

Industrial relations

Representativeness of the European social partner organisations: Inland water transport sector



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Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners (that is, the trade unions and employer organisations) in the field of industrial relations in the inland water transport (IWT) sector, and to show how they relate to the sector's European interest associations representing the employees and the employers. The report is divided into three parts: an overview of the economic specificities and the employment trends in the IWT sector; an analysis of the social partner organisations in all 26 EU Member States where sectoral activities occur; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

This section presents the objectives of the study, along with an introduction to the applied methodology. The context of this study is the European Sectoral Social Dialogue Committee (ESSDC) for the IWT sector, which was established in 1999 following a former joint committee that had been established in 1967.

Objectives of the study

Representativeness studies are conducted for three reasons:

- to identify the representative social partner associations to be consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU)
- representativeness is also a criterion for being eligible for the setting up of an ESSDC, or the participation in one of them
- to analyse the social partner associations' capacity to negotiate agreements that can lead to an implementation by council decision as provided by Article 155 of the TFEU

Representativeness is defined by the Commission Decision on the establishment of European Sectoral Social Dialogue Committees (98/500/EC) (European Commission, 1998). The decision includes the following requirements for a European social partner organisation to be representative.

- to relate to specific sectors or categories and be organised at European level;
- to consist of organisations that are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and are representative of several Member States;
- to have adequate structures to ensure its effective participation in the work of the sectoral social dialogue committees.

To accomplish its aim, this study first identifies the relevant national social partner organisations in the IWT sector before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. This study includes only organisations whose membership domain is classed as IWT 'sector-related'. In terms of territorial coverage, the study includes 26 EU Member States where the sector is present. Greece and Malta were not included in this study.

European Sectoral Social Dialogue Committee for the IWT sector

An ESSDC for the IWT sector was established in 1999. The European Barge Union (EBU) and the European Skippers' Organisation (ESO) for the employers, as well as the European Transport Workers' Federation (ETF) for the employees, participate in the sector's European social dialogue.

Since the 1999 establishment of the ESSDC for the IWT sector, several texts have been agreed upon (see Table 32). The most important achievement is the 2012 European social partner agreement on working time, which has been implemented via a directive. This agreement between ETF, EBU and ESO provides the sector with tailor-made arrangements on working time, taking into account the specificities of this highly mobile sector. Largely, the general working time directive was and is only applicable for onshore employees. The agreement between the social partners concerns nautical crew as well as shipboard personnel, such as hotel and catering personnel. It lays down minimum rules on working time for passenger and freight transport via inland waterways, and it ensures workers' health and safety. The European social partners requested that the European Commission make this agreement generally binding via Council Directive 2014/112/EU (19 December 2014). Directive 2014/112/EU lays down important minimum rules applying to all workers in IWT, such as:

- total working time may not exceed 48 hours per week on average; the average may be calculated within a reference period of 12 months
- total night working time may not exceed 42 hours per week
- the right to at least four weeks' paid annual leave and to paid annual health checks
- the right to at least 10 hours' rest every day (at least six hours must be uninterrupted) and at least 84 hours' rest in total every week

The agreement reflects the regular working schedules in IWT and specifies standards for consecutive working and rest days. Although the normal working day is eight hours, daily working time may be longer, and some weekly rest days may be temporarily postponed, provided that the minimum standards set out above are always respected. The agreement is supposed to support the sector in providing an adapted and attractive framework for the working time of staff. IWT offers huge possibilities and challenges and is a major partner in the entire logistic chain. In the framework of the agreement, an impact assessment study was carried out by Ecorys (2013).

Examples of other texts that have been adopted are the 2018 Joint Social Partners declaration for elimination of violence against women and LGBTQI workers in the workplace, the 2013 Joint position on professional qualifications and training standards for crew members on inland waterways transport vessels, the 2009 Joint sectoral contribution to the Commission's consultation on the future of transport and the 2009 Joint Declaration concerning Social Security Provisions in Inland Waterways Transport.

The IWT sector ESSDC is currently focussing on the establishment of uniform rules on social security legislation, improvements to onboard working and living conditions and access to port-side facilities, recognition of professional qualifications, standardisation and modernisation of crewing requirements, and promoting fair competition (such as establishing recommendations and a social code on fair transport). The ESSDC has also put efforts into ensuring the implementation of Council Directive 2014/112/EU throughout the EU.

Definitions and methodology

The methodology applied in this study is determined by the conditions and criteria indicated in Decision 98/500/EC adopted by the European Commission in 1998: sector-relatedness, membership and organisational capacity. For the purpose of this study, each of these criteria will be defined successively, starting with sector-relatedness and the demarcation of the IWT sector.

For the **demarcation of a specific sector**, reference is made to a number of codes from the statistical classification of economic activities in the European Community (*Nomenclature statistique des activités économiques dans la Communauté européenne – NACE*) (Rev.2). In this study, the IWT sector is defined by NACE codes 50.30, 50.40 and 52.22.

Table 1: Demarcation of the IWT sector with NACE codes

NACE codes	Corresponding economic activity
50.30	Inland passenger water transport
50.40	Inland freight water transport
52.22	Service activities incidental to water transportation

Source: NACE (Rev.2)

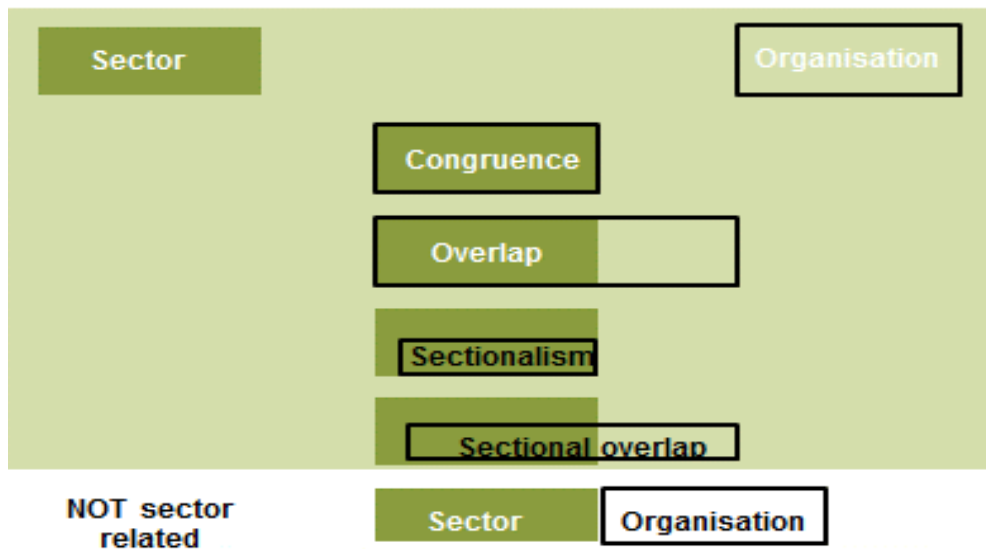
Both Table 2 and Figure 1 present the four different types of sector-relatedness. The membership domains of trade unions and employer organisations can exactly fall together with this demarcation of the sector; this is a type of sector-relatedness called ‘congruence’. If the membership domain of an organisation goes beyond the IWT sector as described here, we call that an ‘overlapping’ organisation. ‘Sectional’ is an organisation that covers part of the IWT sector and nothing else, whereas ‘sectional overlapping’ is an organisation that covers part of the IWT sector and has membership in other sectors.

Table 2: Domain patterns of the members of an organisation

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of a union/employer organisation embrace potentially all employees/companies in the IWT sector?	Does the union/employer organisation also potentially represent employees/companies outside the IWT sector?
Congruence (C)	Yes	No
Overlap (O)		Yes
Sectionalism (S)	No	No
Sectional overlap (SO)		Yes

The figure below presents the four different types of sector-relatedness graphically.

Figure 1: Four different types of sector-relatedness



Membership constitutes another important aspect of representativeness. There are two levels of membership to be looked at: firstly, the geographical coverage of the EU-level organisations (in how many Member States does the EU-level trade union/employer organisation have affiliates?); and secondly, the organisational density of the national affiliates. Another important aspect to be looked at is the question of whether the EU-level players organise most of, or at least the strongest, national-level players, or whether there are major gaps in their membership domain.

Membership to a social partner organisation requires the regular payment of membership fees; however, some organisations are reluctant to inform third parties about such payments. In addition to full membership, ETF statutes provide the possibility of granting trade unions ‘observer’ membership status. On the employers’ side, the ESO’s ‘internal order’ rules allow employer organisations to become full members, as well as the possibility for individual companies to become ‘donor’ members, meaning they do not have the right to participate in meetings or in voting procedures within the organisation. The corporate members of EBU are included in this report in Table 25. For the purpose of this study, different membership statuses are not distinguished; where possible, indirect membership is also taken into account.

The **organisational capacity** of the European social partners is analysed in terms of their ability to participate effectively, to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. For this assessment of the **capacity to negotiate**, the following are considered: the actors, their objectives and the decision-making structures provided in the organisations’ statutes; the outcome in terms of agreed texts; and the processes through which the organisations obtains a mandate, support and approval from their member organisations in the negotiation process.

The **involvement of their members in national-level collective bargaining** is also important as it shows that the affiliates are able to obtain a mandate to negotiate on behalf of their members. Being able to do this allows them to give this mandate to the European-level organisation and to implement agreements or

other jointly agreed texts in an autonomous way. This capacity to act autonomously is important to contributing effectively to European sectoral social dialogue.

Finally, representativeness also depends upon the **structures, resources and capacity of organisations** to mobilise active participation of their members, to aggregate the different interests of member organisations and their possibility to act autonomously at a European level. Effective participation in the ESSDC meetings is assessed in terms of presence at meetings in the two-year period before the year of publication of this report. Internal structures within the European organisations to prepare ESSDC meetings can increase efficiency and ensure that more organisations are represented than the ones that are directly participating in the meetings.

Data collection

The method for conducting this representativeness study combines a top-down and a bottom-up approach to identify national-level sector-related organisations in the IWT sector as defined by NACE codes 50.30, 50.40 and 52.22 (included in Table 1). The top-down approach includes all of the sector-related affiliates of the European associations ETF, EBU and ESO. For EBU and ESO, there are affiliated employer organisations as well as directly affiliated IWT companies. All of these were included in the top-down approach in this study. The bottom-up approach includes all other relevant associations. These are sector-related membership domains involved in sector-related collective bargaining and those sector-related organisations who represent collective interest on behalf of labour and businesses with a significant membership base in the sector. This ensures that relevant interest organisations in countries without (or with only minor) sector-related collective bargaining structures are considered.

The collection of quantitative data, such as those on membership, is essential for investigating the representativeness of the social partner organisations. Unless cited otherwise, this study draws on the country studies provided by the Network of Eurofound correspondents . Where precise quantitative data could not be obtained, estimates are provided rather than leaving a question blank. Thus, the quantitative data may stem from three sources, namely:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the respective organisations (e.g. to calculate the density rates)
- estimates, expert opinions, and assessments made by Eurofound national correspondents or representatives of the respective organisations

Other sources are the European Transport in Figures report issued by the European Commission in 2017; the impact assessment studies from Panteia (2014) regarding the recognition of professional qualifications and training standards in IWT; and a impact assessment study from Ecorys (2013) on the costs and benefits of the implementation of the European Agreement on working time in IWT. (For an overview of European studies regarding IWT, see European Commission (n.d.)).

Quality control measures

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study.

Firstly, combining the top-down with the bottom-up approach, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound correspondents from May to July 2017. Subsequently, Eurofound's research

managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the national correspondents to revise them in the second half of 2017.

An overview of the national contributions was made available to the European social partners to allow their affiliates to double-check and comment. In addition, in April and May 2018, the national members of the Eurofound Governing Board were invited to check the consistency of the information in this report, so as to ensure that the bottom-up approach included all relevant sector-related organisations.

An element of mutual control and recognition has been included in this process by enabling different social partner organisations to see the reported information of other organisations in the same country and, if necessary, to comment on the credibility or correctness of the information of rival organisations.

Draft versions of the overview report were shared with ETF, EBU, ESO and the European Commission for feedback and comments in June 2018. The final report, taking into account these comments, was then evaluated and approved in a September 2018 meeting of Eurofound's Advisory Committee on Industrial Relations, which consists of representatives of both sides of industry, governments and the European Commission, in the presence of the sectoral social partner organisations identified in the report.

Structure of the report

This report consists of four main parts. The first chapter looks into economic developments and the specificities of the IWT sector to better understand industrial relations in the sector. The second chapter takes stock of the national sector-related trade unions and employer organisations in the sector. It will also analyse the extent to which these organisations cover the entire sector and their involvement in collective bargaining or social dialogue. The third chapter includes an assessment of the representativeness of the European social partners participating in the ESSDC of the IWT sector. The fourth chapter draws the conclusions.

Before starting on the pathway of these chapters towards the conclusion, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not reach any definite conclusion on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for admission to the European social dialogue. The reason for this is that defining criteria for deciding upon adequate representativeness is a matter for political decision rather than an issue of research analysis.

1. Economic background and employment trends

IWT depends upon the presence of waterways, rivers, lakes and canals, and their navigability is an important precondition for IWT. In 25 EU Member States there are navigable waterways that can be used for the purpose of transporting freight or passengers.¹

While this is not the case for Cyprus, Greece or Malta, Malta does have companies operating passenger ships under the Maltese flag (Ecorys, 2013, p. 37). Cyprus, on the other hand, has employees in the IWT sector without having waterways or companies operating in the sector. As a result, Cyprus is included in this study, while Greece and Malta are not.

Throughout the EU, there are about 44,500 persons employed in the IWT sector, of which 73% are employees and 27% are self-employed. The number of companies in the sector is slightly less than 10,000, which immediately reveals the rather small number of employees per company. Within IWT, a distinction is made between passenger IWT (NACE 50.30) and freight IWT (NACE 50.40), as well as services to IWT, such as inland waterway dredging and port facilities (NACE 52.22).

In this chapter, the specificities of employment in the IWT sector are analysed in the first section, followed by a section on the characteristics of companies in the sector. The third section considers the national and international aspects of the IWT sector.

Employment in the IWT sector

Employment in the IWT sector can be broken down into different groups. According to their employment status, workers can be distinguished as either self-employed or employees (mobile workers). In this context, a mobile worker is defined as: ‘any worker employed as a member of travelling personnel by an undertaking which operates transport services for passengers or goods by inland waterway’ (Ecorys, 2013, p. 25). Additional employment groups include boat-masters as well as operational staff.

Table 3: Employment groups (self-employed and employees) in the IWT sector

Employment status	Groups	Sub-group
Self-employed	Owner-operators (boat-masters) not registered as employees for social security purposes	
	Crew members and other shipboard personnel that are self-employed according to national definitions	
Employees (mobile workers)	Owner-operators (boat-masters) registered as employees for social security purposes	
	The definition of IWT worker covers any person who undertakes genuine and effective work for which they are paid under the direction of someone else	Workers of a Member State Third-country migrant workers

Source: Ecorys (2013, p. 25)

In most EU Member States, the proportion of self-employed workers in the IWT sector is lower than 20%. Only in seven EU Member States is this not the case: in Belgium, 68% of the employment is taken by the self-employed, while in Slovenia it is 61%. The other EU Member States with a larger proportion of self-

¹ Inland waterways can also be used to transport water (water management, land irrigation) or for recreation.

employed workers in the IWT sector are Italy (48%), the Netherlands (41%), Poland (33%), Austria (28%) and the United Kingdom (UK) (21%). In Austria, there are only self-employed workers in passenger IWT, where it amounts to 36%, and none in freight IWT. In general, however, there are more self-employed workers in freight IWT (31%) than in passenger IWT (19%) Only in Austria, Croatia and Italy are there more self-employed workers in passenger IWT (see Tables A5 and A6 in Annex 1).

Looking at the age of those employed in the IWT sector, most are between 40 and 60 years old. Among the younger age groups, there are more employees/mobile workers and fewer self-employed workers. Among the older age groups, there are more self-employed workers and more boat-masters. For those over 60 years old especially, the proportion of self-employed workers is much higher (Ecorys, 2013, pp. 142–143).

Ecorys noted a modest decrease in the overall employment of employees/mobile workers in the period between 2008 and 2011 (2013, p. 31). This was likely due to the economic crisis at that time, as a result of which operators had less cargo to transport, possibly resulting in a decrease in the demand for nautical personnel. In the same period of time, the number of self-employed workers increased slightly, partly due to an increase in the number of new vessels that were ordered before the economic crisis and that came into service in the years 2008–2011 (Ecorys, 2013, p. 31).

Regarding employment in IWT, there is a hidden reserve of occasional, part-time and temporary workers that is not included in the given numbers (Panteia, 2014, p. 11). This type of employment concerns people with sailing licences who are not active on a regular basis, for instance, family members with a boat-master certificate who can help workers in busy periods, or when someone is ill. This phenomenon appears in France, for example, where there are 5,922 persons with a boat-master certificate, a figure that is much higher than the total number of employees in IWT in France – which totals 3,700 – and certainly much higher than the 790 boat-masters in France (Panteia, 2014, p. 11).

Activities in the IWT sector are largely concentrated in a relatively small number of EU Member States, as shown in the left-hand column of Tables 5 and 6. The Netherlands amounts for 33% of the EU workforce in IWT, Germany for 13% and France for 9%. Together, 55% of the IWT employment in the EU is located in the Netherlands, Germany and France, and in terms of companies, 65% of EU companies in the IWT sector are based in those three countries. These proportions are based on the figures in Tables 5 and 6 from 2010 to 2011. Table 37 in Annex 1 includes more recent data, from 2016, showing that in the Danube area, Romania now has 6,908 employees in the IWT sector, corresponding to 15% of the EU workforce. For 2016, the Netherlands, Germany, France and Romania are the four EU Member States with more than 5,000 employees in the IWT sector. These four countries together have an IWT workforce of almost 35,000, or 77% of the entire EU workforce (see Tables 6).

In both Romania and the Netherlands, IWT activities are mostly in freight, while for France and Germany, it is almost equally balanced between freight and passenger IWT. In the table below, the EU Member States marked in blue are those in which there is more employment in freight IWT; those in green are the EU Member States with more employment in passenger IWT .

Table 4: Relative importance of freight and passenger IWT in different EU Member States

EU Member States with >75% of IWT workforce in freight IWT	NL, LU, BE, RO, SK, HR, LV
Between 55% and 75%	BG, CZ, SI
Between 45% and 55%	DE, FR, PL
Between 25% and 45% (more in passenger IWT than in freight)	UK, HU, DK
25% and lower	IT, SE, ES, FI, AT
Only employment in passenger IWT	PT, LT, EE

Source: Author's own calculations, based on *Ecorys (2013, p. 32)* and Table A5 in Annex 1

The situation is slightly different for freight and for passenger IWT. For the whole of the EU, 61% of the IWT workforce is employed in freight and 39% in passenger IWT. Of the EU workforce in freight IWT, 42% is employed in the Netherlands, 11% in Germany and 10% in Luxembourg. France, Belgium and Romania each employ about 7% of the EU workforce in freight IWT.

Of the EU workforce in passenger IWT, 19% is employed in the Netherlands, 17% in Germany, 12% in France and 12% in Italy. Sweden, the UK and Portugal each employ about 5% of the EU workforce in passenger IWT, followed by Bulgaria and Hungary where this is 4%. A detailed overview for the year 2011, breaking down the total employment in IWT into employees/mobile workers and self-employed workers, and into freight and passenger IWT, can be found in Tables A5 and A6 in Annex 1.

Figure A1 in Annex 1 presents changes in employment figures between 2011 and 2016. In most countries, there has been an increase in the number of employees in the sector. Significant increases are found in Romania and Cyprus, which also corresponds to a significant increase in companies in these two Member States. By definition, the increase in Cyprus implies companies in NACE 52.22, that is, companies providing service activities incidental to water transportation. A significant decrease in employment figures was found in Croatia, Lithuania and Slovakia. Further research would be needed to understand the factors that explain the changes in these numbers.

Interestingly, in Croatia and Slovakia, the number of companies grew while employment dropped. This may be explained by the fact that larger employers have disappeared from the market or dismissed employees while some smaller companies (including one-person companies) emerged.

Companies in the IWT sector

There are about 10,000 companies in the EU operating in the IWT sector. About 52% of these companies only employ one person, and another 45% employ 2–9 workers. There are also IWT companies with more than 10 employees, and even with more than 250, though this relates only to a small number of companies. In many cases, vessels are family-owned and are operated by that family. This type of IWT company can be observed mostly in Belgium, Germany and the Netherlands. The table below shows that 44% of all IWT companies are from the Netherlands.

Table 5: Number of companies in the EU in IWT (in 2011)

EU Member State	Number of companies in 2011	EU Member State	Number of companies in 2011	EU Member State	Number of companies in 2011
NL	4259	LU	132	DK	18
FR	1023	HU	108	LT	15
DE	970	CZ	95	HR	13
IT	926	AT	82	LV	12
PL	535	FI	76	SK	8
SE	487	ES	63	EE	1
BE	304	PT	41	IE	1
UK	246	SI	33		
RO	166	BG	32	TOTAL	9646

Source: Panteia (2014, p. 12)

To demonstrate the context in which companies in the IWT sector operate, this section first illustrates business opportunities in the sector, followed by some challenges and how the EU develops action programmes to deal with both these opportunities and challenges. Finally, this section presents detailed numbers per country to illustrate the relative importance of microenterprises in the sector.

The potential for increasing the modal share of IWT is significant. Compared to other modes of transport, which are often confronted with congestion and capacity problems, IWT is characterised by its reliability, energy efficiency and major capacity for increased exploitation, making it a competitive alternative to road and rail transport. In particular, it offers an environmentally friendly alternative in terms of both energy consumption and noise emissions. Its energy consumption per km/ton of transported goods is approximately 17% of that of road transport and 50% of that of rail transport. In addition, IWT ensures a high degree of safety, in particular when it comes to the transportation of dangerous goods. Finally, it contributes to decongesting overloaded road networks in densely populated regions wherever the infrastructure enables this solution.

There are, however, also challenges for companies in the IWT sector, related to obstacles for labour mobility and safety issues. Both mobility and safety are hampered by deficits related to professional qualifications, language skills, training and certification of IWT workers (Panteia, 2014, p. 23). To deal with the opportunities and challenges of the IWT, different action programmes have been adopted by the European Commission, including Prospects of inland navigation within the enlarged Europe (PINE) in 2004, and Navigation and Inland Waterway Action and Development in Europe (Naiades) in 2006. In the Naiades II programme, running from 2014 to 2020, actions are considered in the areas of: quality infrastructure, innovation, smooth functioning of the market, environmental quality through low emissions, skilled workforce and quality jobs, and integration of IWT into the multimodal logistics chain (Panteia 2014, p. 23).

The number of companies in Table 5 and the number of employees in Table 6 are based on data from 2011 and 2010. The data collected by the Network of Eurofound correspondents for 2016 have been included in Table A16 in Annex 1. This data does not allow for cross-country comparison as the sector-scope of the data differs between countries. However, calculating the average number of employees per company would show that in IWT in general, companies are small with very few employees. Overall, the sector is made up of smaller enterprises. In Cyprus, however, there are a large number of employees per company, suggesting that a smaller number of larger enterprises make up the sector.

According to the European Transport in Figures report issued by the European Commission in 2017, there were 44,500 persons employed in IWT in 2014, and 9,860 enterprises operating in the sector. Tables 36 and 37 and Figures 6 and 7 below show trends in the number of companies and employment between 2011 and 2016 based on the evidence collected through the Network of Eurofound correspondents.

Looking at the changes in the number of companies throughout Europe, there is an increase in almost all EU Member States (see Figure A2 in Annex 1). The largest increase can be found in Romania, along with significant increases in Estonia, Cyprus² and Slovenia. It should be noted that the IWT sector in Estonia and Slovenia is very small, so a small increase in absolute terms means a large relative increase. It is likely that, in both countries, the sector mainly involves passenger transport. Seven countries witnessed a decrease in the number of companies, with Portugal having the largest decrease.

National and international characteristics of the IWT sector

Tables A3 and A4 in Annex 1 give an overview of the developments in the sector from about 2011 to 2016 for each of the 26 EU Member States (excluding Greece and Malta). These tables present data on the number of companies and employees in the sector, the proportion of female employees and how the sector relates to the national economy for 2011 and 2016. Other data from 2010 provided by Ecorys (2013) illustrate the concentration of IWT employment in the Netherlands and Germany, and the other EU Member States on the left in the table below.

Table 6: Employment in the EU in IWT (in 2010)

EU Member State	Employment in 2010	EU Member State	Employment in 2010	EU Member State	Employment in 2010
NL	13908	UK	1051	AT	208
DE	5589	HU	867	LT	145
FR	3700	PT	853	DK	143
LU	2811	CZ	800	HR	133
IT	2553	PL	616	LV	106
BE	2399	SK	444	EE	61
RO	2329	ES	388	SI	61
BG	1679	IE	285 (**)		
SE	1101	FI	267		

Source: Ecorys (2013, p. 32) and (**) for Ireland, Waterways Ireland (2014)

Making a comparison between countries can be difficult. Theoretically, it is conceivable that a German operator operates in Hungary, has a seat in Luxembourg, flies the Maltese flag and hires Polish mobile workers via a recruitment agency in Cyprus. In this situation, it becomes complicated to determine which law of which country applies for different aspects of the business operations. It may also affect the compliance and enforcement of working time regulations in IWT. The employment of non-nationals in the

² The increase for Cyprus does not, however, include agency workers, which are quite common in the IWT industry, especially in the passenger transport sector. We have indications that a large part of the IWT workforce (1,877 workers) are being employed through agency services in Cyprus. These workers might be employees excluded from the application of the directive, although Cyprus does not have any registered vessels navigating inland waterways. Apart from Cyprus, agency services in the IWT sector are offered regularly from Luxembourg, Liechtenstein (which does not have any inland waterways) and Switzerland (a non-EU member but a Central Commission for Navigation on the Rhine (CCNR) member).

IWT sector applies to migrant workers from countries other than the country of the operator (Ecorys, 2013, p. 25). This includes both migrant workers from other EU Member States and from outside the EU. Data on the proportion of non-national employment in the IWT sector is only available for six EU Member States (see Table 7), but among these is the Member State with the most IWT employees. It can be concluded that, even though this proportion varies from country to country, it is still significant to understanding the characteristics of the sector, the relevance of language skills and international recognition of qualifications for mobility and safety.

Table 7: Proportion of non-national employment in some EU Member States (in 2010)

EU Member State	From other EU Member State	Non-EU
BE	27%	0.01%
DE		23%
HU	1%	10%
LU	100%	
NL	26%	1%
SK	10%	3%

Source: Ecorys (2013)

The international dimension of IWT can also be illustrated by the fact that the backbone of IWT in the EU is made up of two rivers – the Danube and the Rhine – that are interconnected via a canal in Germany, thus making the inland waterway link between the Black Sea (Constanța in Romania) and the North Sea (Rotterdam in the Netherlands). This setting therefore gives a number of EU Member States cross-border interconnected waterways.

Table 8: EU Member States with and without cross-border interconnected waterways

Type of inland waterway	EU Member States
EU Member States with cross-border interconnected waterways	AT, BE, BG, HR, CZ, FR, DE, HU, LU, NL, PL, RO, SK, SI
EU Member States with inland waterways that are not cross-border interconnected	DK, EE, FI, IE, IT, LV, LT, PT, ES, SE, UK
EU Member States without inland waterways	CY, EL, MT ³

Source: Panteia (2014)

The three EU Member States without inland waterways are Cyprus, Greece and Malta. Greece and Malta are not included in this study. Cyprus is included because it has workers in the IWT sector even though it does not have inland waterways. Malta has companies operating on inland waterways in other countries with mainly posted workers from other countries.

About 60% of the employment in IWT is situated in the Rhine Corridor. This Corridor provides the main east–west link between continental European countries, connecting France and Germany, Austria, Slovakia,

³ Social partners draw attention to the situation in countries such as Malta and Cyprus that try to evade European regulations (such as the directive on working time in IWT) on the grounds that they do not have inland waterways, while they do host IWT companies and companies in the service of IWT. ETF considers this as unfair competition, making the European sector social dialogue more difficult.

Hungary, Romania and Bulgaria all along the Main and Danube rivers to the Black Sea. This is mostly important for freight IWT. IWT has a 6.3% share of freight volume in the EU, but this share is considerably higher in countries with good waterway infrastructure. The main contributors to EU IWT performance (in tonne-kilometre, tkm) are by far Germany and the Netherlands. Freight transport on inland waterways between these two countries accounted for more than 70% of the EU IWT performance in 2016 according to Eurostat.

In terms of the regional concentration of the volumes of IWT in Europe, 60% takes place on the Rhine (in and between France, Germany, the Netherlands and Switzerland), 13% on the Danube (in and between Austria, Germany, Hungary, Romania, Bulgaria and Serbia), 8% on the Rhine-Scheldt Canal (the Netherlands and Belgium), 6% on the Seine in France and the remaining 13% on other inland waters elsewhere (CE Delft et al, 2011).

Finally, the transnational dimension of IWT in the EU depends on the fact that several international institutions coexist and regulate certain cross-border aspects of IWT in the EU. Besides the EU,⁴ there are four international organisations dealing with IWT in Europe, each with a different but, to an extent, overlapping regulatory and geographical scope: the Danube Commission, the Central Commission for Navigation on the Rhine (CCNR), the Moselle Commission, and the Sava Commission.

The Danube Commission was established in 1948 and its members from the EU are: Austria, Bulgaria, Croatia, Germany, Hungary, Slovakia and Romania. Further members of the Danube Commission are Moldova, Russia, Ukraine and Serbia. The CCNR has existed since 1815, with Belgium, France, Germany, the Netherlands and Switzerland as Member States. One of the ten committees within the CCNR is its Committee on Social Issues, Employment and Professional Training. The cooperation between the CCNR and the European Commission, the Directorate-General for Mobility and Transport of the European Commission (DG MOVE), is shaped in an administrative arrangement made on 22 May 2013. The Moselle Commission links France, Germany and Luxembourg. The Sava Commission, launched in 2001, includes Bosnia and Herzegovina, Croatia, Serbia and Slovenia.

⁴ EU directives regulating IWT are, for example, 2005/36/EC, 91/672/EEC, 96/50/EC and 2014/112/EC.

1. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the IWT sector. These are the affiliates of ETF, EBU and ESO (top-down data collection), as well all other national trade unions and employer organisations that have members in the sector and that are involved in sector-related collective bargaining (bottom-up data collection).

66 trade unions were identified in 22 of the 26 EU Member States. Regarding the national employer organisations, 36 organisations were identified in 16 of the 26 different EU Member States, of which all 36 were found to be sector-related and are a part of this study, as indicated in Table 9.

Table 9: Number of sector-related organisations per country (2016–2017)

Number of sector-related organisations	EU Member States with respective number of trade unions	EU Member States with respective number of employer organisations
0	CY, LT, PL, SI	BG, HR, CY, EE, IE, LT, LV, SI, SK, ES
1	HR, EE, DE, LV, SK	AT, HU, LU, PL, PT, RO, UK
2	AT, BE, BG, CZ, HU, IE, LU, NL, RO	CZ, DK, FR, NL
3		FI, DE, SE
4	DK, ES, UK	IT
5	FI, FR	
6	IT	
7	SE	
8	PT	BE

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

In 23 EU Member States there is at least one trade union, and in 16 EU Member States there is at least one employer organisation that will be considered as a part of this study. The four EU Member States without a trade union in the IWT sector are Cyprus, Lithuania, Poland⁵ and Slovenia. Table 9 also shows that there are no IWT sector employer organisations included in the study for ten countries (Bulgaria, Croatia, Cyprus, Estonia, Ireland, Latvia, Lithuania,⁶ Slovakia,⁷ Slovenia and Spain).⁸

According to the definitions used in representativeness studies for both trade unions and employer organisations, several organisations were identified that are active in the sector at the national level, but

⁵ For Poland, a trade union was included in the previous 2010 representativeness study for the IWT sector, though this trade union no longer exists. It was the trade union organisation in former Odratrans Co. (currently OT Logistics Co.), which was the Plant Commission of the Independent Self-Governing Trade Union ‘Solidarity’ in Odratrans Co. (Komisja Zakładowa Niezależnego Samorządnego Związku Zawodowego ‘Solidarność w Odratrans Co.), which, as indicated, no longer exists.

⁶ For Lithuania, there is the National River Transport Development Association, which is not involved in collective bargaining, nor affiliated at EU level, and thus also not included in this study.

⁷ In Slovakia, there is an organisation with 19 member companies in the IWT sector, called Unia dopravy, post a telekomunikácii SR (UDPT SR), but as this organisation is not involved in collective bargaining and not affiliated at EU level, it is not included in this study.

⁸ Other national associations were checked for having members in the IWT sector, for example the Spanish Shipowners’ Association (Anave) and the Asociación Nacional de Empresas Estibadoras (Anesco) in Spain, but none had members in the IWT sector or was involved in IWT sector-related collective bargaining. As such, there were no IWT sector-related employers organisations found in 10 EU Member States.

not a member of the three ESSDC members, nor are they active in collective bargaining. In addition, there were organisations that were found not to have members in the sector. These were also excluded from the study.

This study shall be carried out based on 66 trade unions and 36 sector employers organisations.

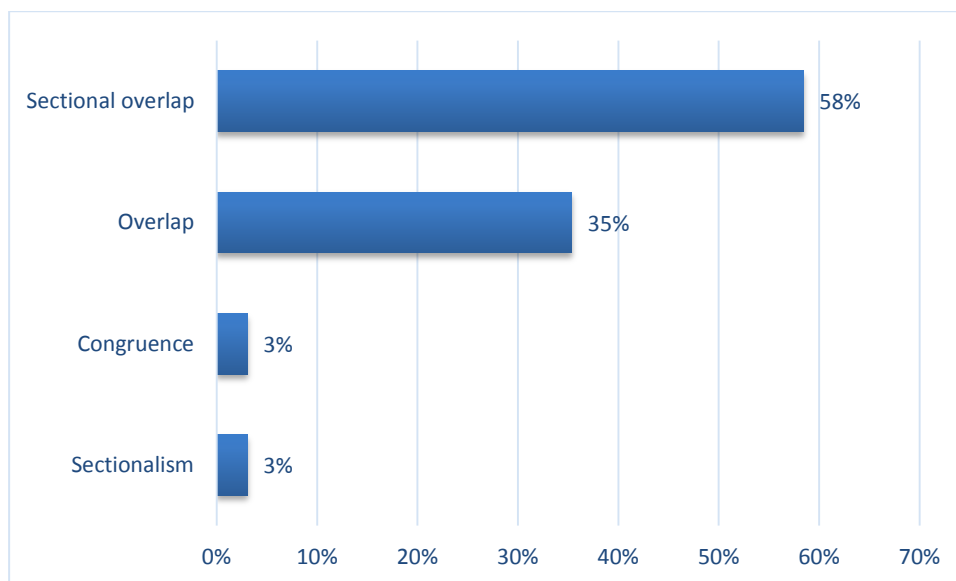
Sector-relatedness, sector coverage and organisational density of trade unions

In this section, trade union membership domains will first be assessed by classifying them according to the four patterns of membership domain sector-relatedness explained in the methodological section.

Information on domain coverage is available for 64 of the 66 trade unions. 25 trade unions from 14 different Member States cover the entire sector. Of those 25, there are two (in Belgium and Slovakia) that have a membership domain congruent with the IWT sector, while the other 23 have an overlapping membership domain.

For 38 of the 66 trade unions (58%), the domain pattern is sectional overlap. Sectional overlap occurs in countries where trade unions represent certain categories of employees (for example, based on employment status or occupation), but cover more than just the IWT sector.

Figure 2: Domain coverage of trade unions in the IWT sector



Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

As mentioned, the domain pattern of overlap exists in 23 cases and is the next most important domain pattern in the IWT sector. Overlap occurs where general unions are the most important pattern of union organisation. In various cases, it arises that some unions cover nearly all sectors of economic activity, such as the Netherlands Trade Union Confederation (FNV) as well as Unite in the UK. Overlap also results from domain demarcations that include further or adjacent domains in addition to the IWT sector, which are, for example, in other transport sectors:

- railway and local public transport sector, such as Federazione Autonoma Italiana Sindacale Autoferrotranvieri (Faisa Cisl) in Italy
- sea passenger and freight transport, such as ŪTAF in Latvia

- the whole transport sector, such as the Swedish Transport Workers' Union (Transport) in Sweden

Table 10: Membership domain patterns of sector-related trade unions in the IWT sector (2016–2017)

EU Member State	Congruence	Sectionalism	Overlap	Sectional overlap
AT			vida	GPA-djp
BE	BTB-UTB'	CSC/ACV-Transcom		
BG			FTTUB	
HR			SPH	
CZ			OSD	OSN
DK				Serviceforbundet, HK/Privat, SL, 3F
EE				
FI		Luotsiliitto	SMU, SLPL	JHL, SKL
FR			FGTE CFDT	FEETS-FO, FNPD CGT, PSCN CFE CGC, UNSA Transport
DE			ver.di	
HU				KDSZSZ, VDSZ
IE				SIPTU, IMPACT
IT			FILT-CGIL, FIT-CISL, UILTRASPORTI	Faisa Cisa, UGL FNA, Federmanager
LV				ŪTAF
LU			OGBL, LCGB	
NL			NINL/Nautilus, CNV Vakmensen	
PT			SIMAMEVIP, STFCMM	SITEMAQ, SEMM, SINCOMAR, SMMCMM, Oficiaismar, SITESE
RO				FSTC, FNSP
SK	OZPVD			
ES			FSC-CCOO, FeSMC- UGT	ELA – Zerbitzuak, SAME
SE				SEKO, Transport, Unionen, SRAT, SBF, Ledarna, Sveriges Ingenjörer
UK			Nautilus International, Unite the Union, Rail, Maritime and Transport Union	UNISON

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016). Information provided for trade unions where data is available and for trade unions that are relevant in the context of the definitions applied in representativeness studies. The colour green in Table 11 (below) indicates that the trade union covers this activity, while red indicates that it is not covered. Most trade unions fully cover the entire IWT sector, as defined by NACE codes 50.30, 50.40 and 52.22 (62%). In 18 different EU Member States there is at least one trade union organising employees in all three different IWT

NACE code activities. For instance, in France, Hungary and Latvia, there are no trade unions that cover the entire sector, therefore, certain sectoral activities are not covered in these countries.

Table 11: Sector coverage of the 66 IWT trade unions

Abbreviation	Trade union	NACE 50.30	NACE 50.40	NACE 52.22
AT	vida	Yes	Yes	Yes
	GPA-djp	No	Yes	Yes
BE	BTB-UTB'	Yes	Yes	Yes
	CSC/ACV-Transcom	Yes	Yes	Yes
BG	FTTUB	Yes	Yes	Yes
	STU*	n/a	n/a	n/a
HR	SPH	Yes	Yes	Yes
CZ	OSD	Yes	Yes	Yes
	OSN	No	No	No
DK	Serviceforbundet	Yes	Yes	Yes
	HK/Privat	Yes	No	Yes
	SL	No	No	Yes
	3F	Yes	No	Yes
EE	EMSA*	n/a	n/a	n/a
FI	SMU	Yes	Yes	Yes
	JHL	Yes	Yes	Yes
	SKL	Yes	Yes	Yes
	SLPL	Yes	Yes	Yes
	Luotsiliitto	No	No	Yes
FR	FGTE CFDT navigation intérieure	Yes	Yes	No
	FEETS-FO	Yes	Yes	No
	FNPD CGT	Yes	Yes	No
	PSCN CFE CGC	Yes	Yes	No
	UNSA Transport	Yes	Yes	No
DE	ver.di	Yes	Yes	Yes
HU	KDSZSZ	Yes	No	Yes
	VDSZ	Yes	No	Yes
IE	SIPTU	Yes	Yes	Yes
	IMPACT	Yes	Yes	Yes
IT	FILT-CGIL	Yes	Yes	Yes
	FIT-CISL	Yes	Yes	Yes
	UILTRASPORTI	Yes	Yes	Yes
	Faisa CisaI	Yes	No	No
	UGL FNA	Yes	No	Yes
	Federmanager	Yes	No	Yes
LV	ŪTAF	No	No	Yes
LU	OGBL	Yes	Yes	Yes
	LCGB	Yes	Yes	Yes
NL	NINL/Nautilus	Yes	Yes	Yes
	CNV Vakmensen	Yes	Yes	Yes
PT	SIMAMEVIP	Yes	Yes	Yes
	STFCMM	Yes	Yes	Yes

	SITEMAQ	Yes	Yes	Yes
	SEMM	Yes	Yes	Yes
	SINCOMAR	Yes	Yes	Yes
	SMMCM	Yes	Yes	No
	Oficiaismar	Yes	Yes	Yes
	SITese	Yes	Yes	Yes
RO	FSTC	No	Yes	Yes
	FNSP	Yes	Yes	Yes
SK	OZPVD	Yes	Yes	Yes
ES	FSC-CCOO	Yes	Yes	Yes
	FeSMC-UGT	Yes	Yes	Yes
	ELA – Zerbitzuak	Yes	Yes	Yes
	SAME	No	Yes	No
SE	SEKO	Yes	Yes	No
	Transport	Yes	Yes	Yes
	Unionen	Yes	Yes	Yes
	SRAT	No	No	Yes
	SBF	Yes	Yes	No
	Ledarna	Yes	Yes	Yes
	Sveriges Ingenjörer	Yes	Yes	Yes
UK	Nautilus International	Yes	Yes	Yes
	UNISON	Yes	Yes	Yes
	Unite the Union	Yes	Yes	Yes
	Rail, Maritime and Transport Union	Yes	Yes	Yes

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*Fact sheet not available

**According to the correspondent, OSN does not cover either sector. According to ETF, there are OSN members in IWT

Of the 66 IWT sector-related trade unions, there are 49 that have members both in passenger and in freight IWT. For passenger IWT, there are 56 trade unions in 19 different EU Member States. Of these 56, there are seven trade unions that have members in passenger IWT, but not in freight. These are HK/Privat and 3F in Denmark, KDSZSZ and VDSZ in Hungary, and three Italian trade unions: Faisal Cisol, UGL FNA and Federmanager.

As for freight IWT, there are 52 trade unions from 19 EU Member States. There are three trade unions that only have members in freight IWT, and not in passenger IWT; these are GPA-djp in Austria, FSTC in Romania and SAME in Spain. The Hungarian trade unions do not represent workers in freight IWT, only in passenger IWT.

As for service activities related to IWT, there are 53 trade unions from 20 different EU Member States. Four trade unions only cover the workers in these service activities, without having members in passenger or freight IWT. These four trade unions are: SL in Denmark, Luotsiliitto in Finland, ŪTAF in Latvia and SRAT in Sweden. None of the French trade unions covers workers in IWT service activities. Furthermore, there are five other IWT trade unions that do not cover workers in IWT service activities: Faisal Cisol in Italy, SMMCM in Portugal, SAME in Spain, SEKO and SBF in Sweden.

Table 9 shows that in many EU Member States there is more than one trade union. In some cases, these trade unions cover the same membership domain, but with a different ideological or organisational approach. This is considered as pluralism.

In many cases, however, trade unions cover different segments of the sector, for example, only blue- or only white-collar employees, only some activities in the sector, only some types of company or only some parts of the country. This is called fragmentation. Table 12 shows the different types of fragmentation in the IWT sector (for details, see Table A14 in Annex 1).

Table 12: Reasons for the fragmentation of trade unions

Trade unions that only cover white- or blue-collar employees, or a specific professional group of workers	Trade unions that do not cover the entire IWT sector (only part of the NACE codes)	Trade unions that only cover some parts of the country	Trade unions that only cover some types of company or size classes
(AT) GPA-djp (BE) CSC/ACV-Transcom (DK) Serviceforbundet, HK/Privat, SL, 3F (FI) JHL, SKL, Luotsiliitto (IE) SIPTU, IMPACT (IT) Federmanager (PT) SITEMAQ, SEMM, SINCOMAR, SMMCM, Oficiaismar, SITESE (SE) SEKO, Transport, Unionen, SBF, Ledarna, Sveriges Ingenjörer	(AT) GPA-djp (CZ) OSN (DK) HK Privat, SL, 3F (FI) Luotsiliitto (FR) FEETS-FO, FNP, PSCN (HU) KDSZSZ, VDSZ (IT) Faisa Cisa, UGL FNA, Federmanager (LV) ŪTAF (PT) SMMCM (RO) FSTC (ES) SAME (SE) SEKO, SRAT, SBF (UK) UNISON	(RO) FSTC, FN (ES) ELA – Zerbitzuak, SAME (UK) UNISON	(IE) IMPACT (RO) FN (SE) Unionen, SRAT
EU Member States with trade unions covering the same membership domain in a pluralistic way			
AT, HR, CZ, FI, DE, IT, LU, NL, PT, ES, UK			

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

As Table 12 illustrates, sectionalism does not only concern the NACE codes, but also other elements, such as territory and covering both blue- and white-collar workers, for instance. For example in Austria, the GPA-djp union only covers white-collar workers employed by Vienna Harbour (Wiener Hafen). In Denmark, Søfartens Ledere (SL) only covers ship officers, captains, licensed pilots, masters and dual-purpose officers. Fragmentation, and especially pluralism, is much stronger on the side of the trade unions, with an average of about 2.5 trade unions per Member State (insofar as included in this study). On the side of the employer organisations, the average is 1.4 organisations per Member State.

Trade union involvement in collective bargaining or social dialogue

The sector-relatedness of trade unions was considered in the previous section. In this section, their involvement in collective bargaining is analysed. Table 13 shows whether a trade union is involved in multi-employer (MEB) or single-employer collective bargaining (SEB). SEB is, in fact, company-level collective bargaining, while MEB is often at the level of the entire sector or a part of it. The percentage in the fifth column stands for the proportion of employees in the sector that are covered by a collective bargaining agreement. The column at the far right of the table shows the number of employees covered by the

collective bargaining agreements signed by the respective trade unions. Trade unions that are highlighted in pink are those not affiliated to ETF.

Table 13: Collective bargaining involvement of the 66 IWT sector trade unions

EU Member State	Trade union	Engaged in sector-related collective bargaining	MEB	SEB	% covered by collective bargaining agreement	Number of workers covered by collective bargaining agreements in absolute numbers
AT	vida	Yes	x	x	75%	400
	GPA-djp	Yes		x		120
BE	BTB-UTB'	Yes	x	x	100%	800
	CSC/ACV-Transcom	Yes	x	x		
BG	FTTUB	Yes	x	x		206
	STU	No				
HR	SPH	No				
CZ	OSD	Yes		x	1%	27
	OSN	No				
DK	Serviceforbundet	Yes	x		55%	85
	HK/Privat	Yes	x			
	SL	Yes	x			197
	3F	Yes	x			150
EE	EMSA	No				
FI	SMU	Yes	x	x	70%	1650
	JHL	Yes	x	x		850
	SKL	Yes	x			1250
	SLPL	Yes	x			15000

	Luotsiliitto	Yes	x			140
FR	FGTE CFDT navigation intérieure	Yes	x	x	100%	4000
	FEETS-FO	Yes	x	x		4000
	FNPD CGT	Yes	x	x		4000
	PSCN CFE CGC	Yes	x	x		4000
	UNSA Transport	Yes	x	x		4000
DE	ver.di	Yes	x	x	80%	5000
HU	KDSZSZ	Yes		x	39%	418
	VDSZ	Yes		x		320
IE	SIPTU	Yes	x	x	100%	285
	IMPACT	Yes	x	x		285
IT	FILT-CGIL	Yes	x	x	100%	1500
	FIT-CISL	Yes	x	x		1500
	UILTRASPORTI	Yes	x	x		1500
	Faisa Cisa	Yes	x	x		1500
	UGL FNA	Yes	x	x		1500
	Federmanager	Yes	x			16
LV	ŪTAF	No				
LU	OGBL	Yes	x	x	70%	3000
	LCGB	Yes	x	x		3000
NL	NINL/Nautilus (FNV)	Yes	x	x	10%	689
	CNV Vakmensen	Yes		x		689
PT	SIMAMEVIP	Yes	x		100%	356
	STFCMM	Yes	x	x		501
	SITEMAQ	Yes	x	x		1000

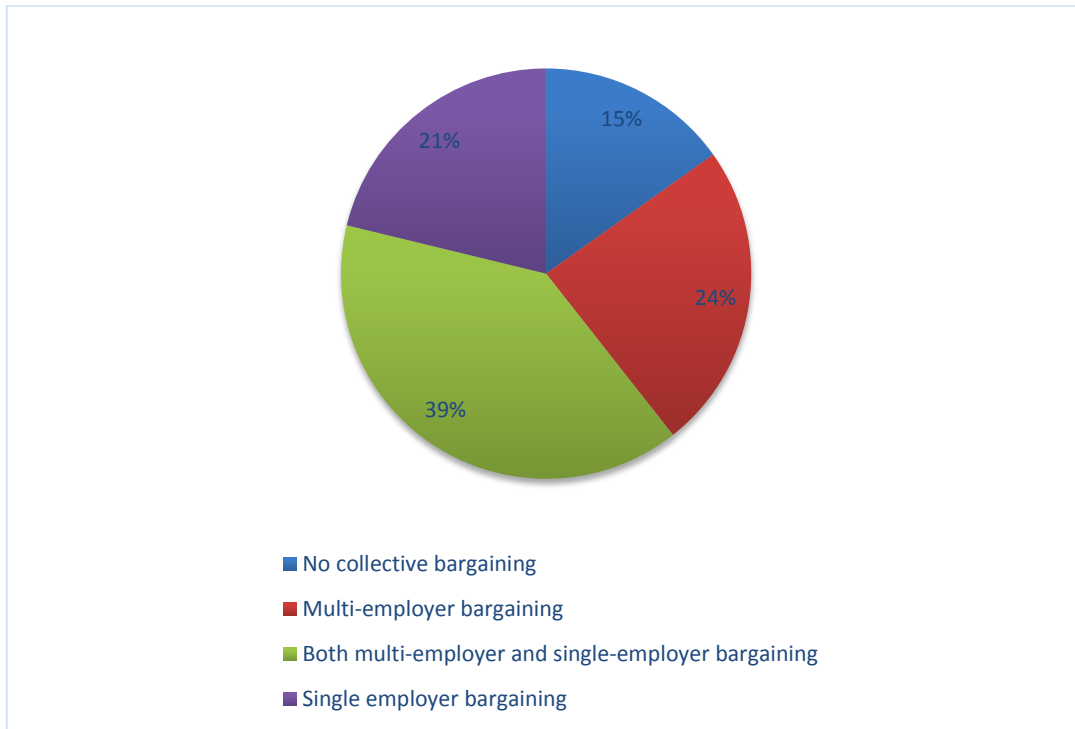
	SEMM	Yes		x		560
	SINCOMAR	Yes	x	x		560
	SMMCM	Yes	x	x		560
	Oficiaismar	No				
	SITSE	Yes	n/a	n/a		488
RO	FSTC (FARUL)	Yes		x		6850
	FNSP	No				
SK	OZPVD	Yes		x	32.1%	225
ES	FSC-CCOO	Yes		x		
	FeSMC-UGT	Yes		x		
	ELA – Zerbitzuak	No				
	SAME	Yes		x		33
SE	SEKO	Yes	x		70%	1000
	Transport	Yes	x			
	Unionen	Yes	x			200
	SRAT	Yes	x			300
	SBF	Yes	x			
	Ledarna	Yes	x			2500
	Sveriges Ingenjörer	Yes	x			
UK	Nautilus International	No		x		421
	UNISON	Yes		x		1800
	Unite the Union	Yes		x		
	Rail, Maritime and Transport Union	Information not available				

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*The trade unions highlighted in pink are affiliated to ETF

Figure 3 shows the proportion of trade unions involved in collective bargaining and the type of bargaining they are involved in. 56 (85%) of the 66 sector-related trade unions for which data is available are involved in collective bargaining. Only 10 trade unions (15%) are not involved in collective bargaining. Of the 66 trade unions in the IWT sector, there are 16 (24%) involved only in multi-level employer bargaining with an employer organisation as counterpart. 14 (21%) are involved only in single-employer bargaining, whereas 26 (39%) are involved in both types of collective bargaining.

Figure 3: Involvement of trade unions in different forms of collective bargaining (% of total)



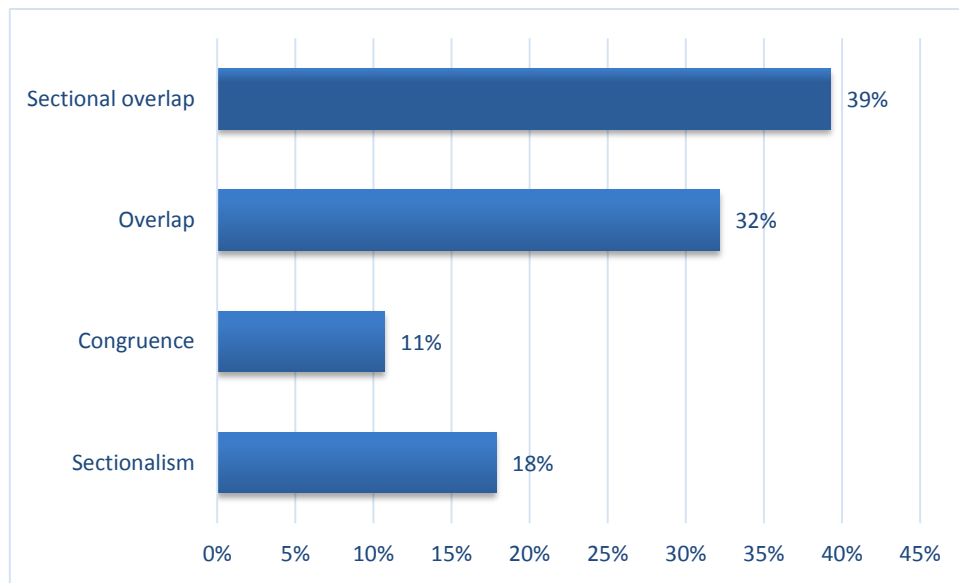
Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

As it is shown in Table 13 above, there are trade unions involved in some form of collective bargaining in the sector in 19 EU Member States. Due to the size of the sector in Croatia, for example, there are only few companies in the sector and hence there is no collective bargaining.

Sector-relatedness, sector coverage and organisational density of employer organisations

The network of Eurofound correspondents identified 36 relevant sector-related employer organisations in 16 Member States; no sector-related employer organisations were identified in Bulgaria, Croatia, Cyprus, Estonia, Ireland, Latvia, Lithuania, Slovakia, Slovenia or Spain. The names and abbreviations of these employer organisations are presented in Table A2 in Annex 1. Detailed data and information on employer organisations, including their membership domains, strength and affiliation to European-level employer organisations, are also presented in Table A2 in Annex 1.

Figure 4: Domain coverage of employer organisations in the IWT sector



Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

For several employer organisations in Belgium and Italy, there is no information about how their membership domain relates to the sector. These organisations are not included in the following analysis, and it therefore refers only to the 28 organisations for which there is complete data. 16 of the 28 employer organisations for which there is available information do not cover the entire IWT sector. For eight EU Member States there is at least one employer organisation covering all three NACE codes.

Sectional overlap occurs with 39% of organisations (11 out of 28 organisations in six countries). This mainly results from domain demarcations of employer organisations excluding certain activities or subsectors within the IWT sector and, at the same time, representing companies of additional or adjacent sectors. In Italy, four employer organisations have the sectional overlap domain pattern.

Overlap is the second most frequent domain pattern of employer organisations in the IWT sector. Overlap occurs in 32% of organisations (nine out of 28 organisations). This is a result of the principle of employer associations organising not only companies of the IWT sector, but also the transport sector in general, or different sectors and activities outside the transport sector. Sectionalism occurs in four countries: France, Luxembourg, Poland and Romania (18% of cases; five out of 28 organisations). In this study's sample, all five of these employer organisations are from countries where a multiple domain pattern does not exist. Two countries have organisations showing a membership domain that is congruent with the sector definition (11% of the cases, three out of the 28 organisations).

This study shows that the two main domain patterns are overlap and sectional overlap. In 12 countries, there exists one obvious domain pattern. In the remaining countries, a pluralistic domain pattern emerges, with several countries following a mix of patterns.

Table 14: Membership domain patterns of sector-related employer organisations in the IWT sector (2016–2017)

EU Member State	Congruence	Sectionalism	Overlap	Sectional overlap
AT			WSKÖ-FVALS	
BE*				WF-FE
CZ			SD ČR	
DK			DI	Danske Rederier
FI			SMLY, PALTA	AVAINTA
FR		CAF, CNBA		
DE	BDB, BDS			VKA
HU			Magyar Vasúti-, Vízi- és Légiközlekedési Szövetség	
IT				ASSTRA, Confetra, Conftrasporto, CNA Fita
LU		Fedil Barging		
NL			CBRB, BLN	
PL		ZPAŚ		
PT*	AATFL			AAMC
RO		A.A.O.P.F.R. Galati		
SE				Sveriges Hamnar, Arbetsgivarverket, Almega Tjänsteföretagen
UK		CBOA		

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*Incomplete information for Belgium

Several employer organisations in the IWT sector do cover all the three NACE codes (50.30, 50.40 and 52.22). In several Member States (Denmark, France, Luxembourg and Poland) parts of the sector as defined by these NACE codes are not covered. Table 15 illustrates the NACE coverage of each employer organisation where information is available.

Table 15: NACE code coverage of employer organisations

EU Member State	Employer organisation	NACE 50.30	NACE 50.40	NACE 52.22
AT	WKÖ-FVALS	Yes	Yes	Yes
BE	Algemeen Aktiecomité der Belgische Binnenvaarts	Yes	Yes	No
	UNIZO (Aequitas)	Yes	Yes	No
	Unie der Continentale Vaart	Yes	Yes	No
	FEB/VBO	No	No	No
	BVE	n/a	n/a	n/a
	VBR	n/a	n/a	n/a
	Ons recht/Notre droit	n/a	n/a	n/a
	WF-FE	No	No	Yes
CZ	SD ČR	Yes	Yes	Yes
	AVP-CZ	n/a	n/a	n/a
DK	DI	Yes	No	No
	Danske Rederier	No	No	Yes
FI	SMLY	Yes	Yes	Yes
	PALTA	Yes	Yes	Yes
	AVAINTA	No	No	Yes
FR	CAF	Yes	Yes	No
	CNBA	No	Yes	No
DE	BDB	Yes	Yes	Yes
	BDS	Yes	Yes	Yes
	VKA	Yes	Yes	Yes
HU	Magyar Vasúti-, Vízi- és Légiközlekedési Szövetség	Yes	Yes	Yes
IT	ASSTRA	Yes	No	No
	Confetra	No	Yes	Yes
	Conftrasporto	No	Yes	Yes
	CNA Fita	n/a	Yes	n/a
LU	Fedil Barging	No	Yes	No
NL	CBRB	Yes	Yes	Yes
	BLN	Yes	Yes	Yes
PL	ZPAŚ	Yes	Yes	No
PT	AATFL	Yes	Yes	Yes
RO	A.A.O.P.F.R. Galati	Yes	Yes	Yes
SE	Sveriges Hamnar	No	No	Yes
	Arbetsgivarverket	No	No	Yes
	Almega Tjänsteföretagen	Yes	Yes	No
UK	CBOA	Yes	Yes	Yes

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Of the 36 IWT employer organisations, 19 include companies affiliated with both passenger and freight IWT. Two employer organisations, DI in Denmark and ASSTRA in Italy, only cover passenger IWT. Five organisations only cover freight IWT; these are CNBA in France, Fedil Barging in Luxembourg and Confetra,

Conftrasporto and CNA Fita in Italy. For five employer organisations there is no information available in regard to which parts of IWT they cover.

There are 20 employer organisations covering IWT service activities. 11 IWT employer organisations do not cover IWT service activities, and for five other organisations, no information in regard to their coverage of IWT service activities was available.

Looking at Table 15 (above) and Table 16 (below), we see that fragmentation on the side of the employers is mostly explained by the fact that some focus only on certain NACE codes. This appears to be the case in Belgium, Denmark, Finland, France, Italy, Luxembourg, Poland, Portugal and Sweden. The fact that different employer organisations cover companies in different segments or economical activities of the IWT sector, appears to contribute to fragmentation in France, Germany, Luxembourg, Poland, Portugal and Romania. In Romania, there is also only one employer organisation, which means that regional limitations are not contributing at all to fragmentation for employer organisations in the IWT sector. Given the relatively low average number of employer organisations, ideological pluralism does not appear to be a relevant factor. All details are available in Table A15 in Annex 1, and summarised in Table 16 below.

Table 16: Reasons for the fragmentation of employer organisations

Employer organisations that do not cover activities outside the sector	Employer organisations that do not cover the entire IWT sector, only part of the NACE codes	Employer organisations that only cover some parts of the country	Employer organisations that only cover some types of company or size classes
(FR) CAF, CNBA (DE) BDB, BDS (LU) Fedil Barging (PL) ZPAŚ (PT) AATFL (RO) A.A.O.P.F.R. Galati (UK) CBOA	(DK) DI, Danske Rederier (FI) AVAINTA (FR) CAF, CNBA (IT) ASSTRA, Confetra, Conftrasporto, CNA Fita (LU) Fedil Barging (PL) ZPAŚ (SE) Sveriges Hamnar, Arbetsgivarverket, Almega Tjänsteföretagen (BE) Segregation between shipping companies (mainly blue-collars) and trade organising companies (mainly white-collars)	(RO) A.A.O.P.F.R. Galati	(FR) CNBA (DE) VKA (IT) Confetra, Conftrasporto, CNA Fita (PT) AAMC (RO) A.A.O.P.F.R. Galati (SE) Arbetsgivarverket
EU Member States with trade unions covering the same membership domain in a pluralistic way			
CZ, FI, HU, NL			

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

IWT employer organisations' involvement in collective bargaining

In the previous section, the sector-relatedness and membership strength of employer organisations was considered, while in this section their involvement in collective bargaining is analysed in Table 17 below. The two columns to the right of the employer organisation names indicate whether the employer organisation is involved in MEB or SEB.

The percentage in the next column stands for the proportion of all companies in the sector in the country that are covered by a collective bargaining agreement. The column on the far right presents the proportion of employees covered by the collective bargaining agreements signed by the respective employer organisation. An overview is provided in Table A2 in Annex 1. Employer organisations that are affiliated to EBU are highlighted in pink, whilst those affiliated to ESO are highlighted in blue.

Table 17: Collective bargaining involvement of employer organisations

EU Member State	Employer organisation	Involved in collective bargaining	MEB	SEB	Companies covered	Workforce covered
AT	WKÖ-FVALS	Yes	x	x	80	350
BE	Algemeen Akticomit� der Belgische Binnenvaarts	Yes	x		100	95%
	UNIZO (Aequitas)	Yes	x		100	95%
	Unie der Continentale Vaart	Yes	x		100	95%
	FEB/VBO	Yes	x		100	95%
	BVE	No				
	VBR	No				
	Ons recht/Notre droit	No				
	WF-FE	Yes	x		100	95%
CZ	SD �R	Yes		x	1	27
	AVP-CZ	Yes		x		
DK	DI	Yes	x		2	205
	Danske Rederier	Yes	x		1	145
FI	SMLY	Yes	x		25	600
	PALTA	Yes	x		26	1000
	AVAINTA	Yes	x		15	550
FR	CAF	Yes	x		100	3072
	CNBA	No				
DE	BDB	Yes	x		40	
	BDS	No				
	VKA	Yes	x			
HU	Magyar Vas�ti-, V�zi- �s L�gik�zleked�si Sz�vetség	Yes	x		2	416
IT	ASSTRA	Yes	x	x		1500
	Confetra	Yes	x			

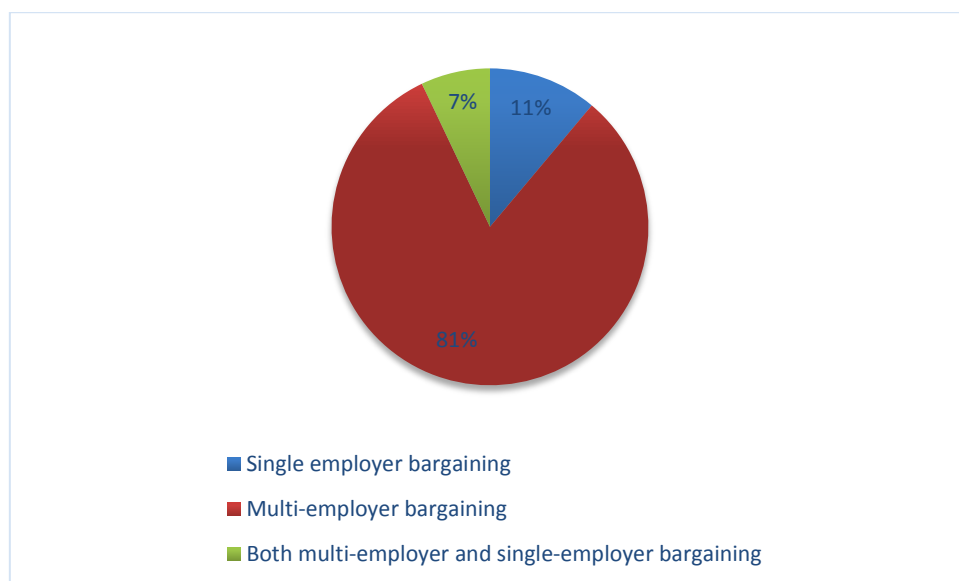
	Conftrasporto	Yes	x			
	CNA Fita	Yes	x			
LU	Fedil Barging	Yes	x		100	3000
NL	CBRB	Yes	x		0	0
	BLN	No			0	0
PL	ZPAŚ	No				
PT	AATFL	Yes	x			8
RO	A.A.O.P.F.R. Galati	No				
SE	Sveriges Hamnar	Yes	x		60	600
	Arbetsgivarverket	Yes		x		987
	Almega Tjänsteföretagen	Yes	x			1250
UK	CBOA	No			0	0

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*The employer organisations highlighted in pink are affiliated to EBU; the ones in blue are affiliated to ESO

27 employer organisations (75%) are involved in sector-related collective bargaining; the other seven employer organisations (25%) are not involved in collective bargaining. Of the 27 employer organisations involved in collective bargaining, 22 (81%) are only involved in MEB, making it by far the most common. Because SEB only relates to an individual company, the company management usually negotiates with trade unions directly, without the involvement of employer organisations. Nevertheless, the table above indicates the involvement of employer organisations in a few SEB cases. Three employer organisations are only involved in SEB and two organisations are involved in both SEB and MEB. Figure 5 illustrates the percentages mentioned.

Figure 5: Involvement of employer organisations in collective bargaining



Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Only one employer organisation was identified for each of Poland, Romania and the UK, none of which is involved in collective bargaining.

Collective bargaining patterns and social dialogue practices

The relevance of European sectoral social dialogue tends to increase with the ability of the national organisations to influence national policies affecting the sector (Perin and Léonard, 2011). For the trade unions where full data is available, 56 of the 66 (85%) are involved in collective bargaining, while this is the case for 27 of 36 employer organisations (75%), for 28 of these 36 there is available information.. Table 18 (below) compares the types of collective bargaining involvement for national IWT sector trade unions and employer organisations.

Table 18: Collective bargaining, absolute figures

	Trade unions		Employer organisations	
No collective bargaining involvement	10	56 CB (85%)	9	27 CB (75%)
SEB	14		3	
MEB	16		22	
Both SEB and MEB	26		2	
Total	64*		28**	

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*Data missing for two trade unions

**Data missing for eight employers organisations

Table 19 (below) presents the collective bargaining information for trade unions on a country-by-country basis, illustrating the different national collective bargaining patterns and collective bargaining coverage. Croatia, Cyprus, Estonia, Latvia, Poland, Slovakia and Slovenia are the countries where sector-related collective bargaining does not exist, as far as the organisations in the study is involved. The table also shows the sole or most prevalent type of collective bargaining per country.

Table 19: Form/level of bargaining per country

Form/level of bargaining	Trade union organisations by country
MEB	BE, DK, DE, IE, SE
Both MEB and SEB	AT, BE, BG, FI, FR, IT, LU, PT
SEB	CZ, HU, LT, NL, ES, UK
No collective bargaining	HR, CY, EE, LV, PL, SK, SI

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

In several other countries, statutory extension provisions allow for the extension of collective agreements to unaffiliated employers only when the signatory trade union and/or employer association represent a certain proportion of the employees within the agreement’s domain, for example, at least 50% of employees in countries such as Finland, Germany, Latvia and Portugal (Eurofound, 2016).

Table 20: Collective bargaining coverage and collective bargaining level

	Collective bargaining coverage				Information not available
	90% or more	50%–80%	25%–50%	1%–25%	
SEB sole level or prevailing level		DK	HU, SK	CZ, LT, NL, BG	ES, UK
MEB sole level or prevailing level	FR, IE, PT, BE	DE, SE, AT			
No collective bargaining					EE, LV, PL, SI, HR, CY

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Tables A10 and A11 in Annex 1 give the information available on collective bargaining within each country, as collected by the Network of Eurofound correspondents. Based on this information, Table 20 provides an overview of the collective bargaining coverage and the type of collective bargaining (SEB, SEB or both SEB and MEB).

Participation in public policy

Apart from the sector-relatedness, organisational and membership strength of social partners and their active involvement in collective bargaining processes, the participation in public policy is also a relevant indicator of the representativeness of national social partner organisations in the IWT sector.

Interest associations may influence public policy in the following two ways.

- They may be consulted by the authorities on matters affecting their members.
- They may be represented on 'corporatist' (tripartite) committees and policy consultation boards.

This study considers only cases of consultation and corporatist participation that relate explicitly to sector-specific matters. Consultation processes can be wide-ranging and, therefore, the organisations consulted by the authorities may vary according to issues and depending on changes in government.

Trade unions or interest representations

A total of 37 out of the 66 trade unions indicated that they were consulted, of which 20 said this was on a regular basis and 17 on an ad hoc basis. For the remaining 19 trade unions, there was no information available.

Employer organisations or business associations

A total of 21 out of the 36 employer organisations reported that they were consulted, while there was no information available in 13 cases. Of these 21, 10 reported that they were consulted regularly and 11 said they were consulted an ad hoc basis.

Table 21: Consultation of employer organisations by country

	Trade unions consulted	No trade union consulted
Employer organisations consulted	AT, CZ, DK , FI , FR , DE, IT, LU , NL, PT, RO, SE, SK , BE , BG , UK	HR, HU, PL
No employer organisation consulted	LV	CY, EE, IE, LT, SI, ES

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Notes: The countries marked in bold are those for which there is a tripartite or bipartite sector-specific board.

Different Belgian small and large employer organisations are consulted by federations (not on their own), often organised together with the state (transport administration). The two key actors are Federation Belgian Inland Shipping (Federatie Belgische Binnenvaart) and Promotion Inland Shipping Flanders (Promotie Binnenvaart Vlaanderen). The different sector-specific employer organisations in Belgium are to a lesser or greater extent represented in these bodies.

Tripartite/bipartite participation

Table 22 (below) identifies sector-related tripartite and/or bipartite bodies along with the participating trade unions and employer organisations. In total, nine countries (marked in bold in Table 21) have sector-related bodies.

Table 22: Tripartite and bipartite sector-specific boards of public policy

	Name	Bipartite/ tripartite	Origin: agreement/ statutory	Trade unions participating	Employer organisations participating
BE	Promotion of Flemish Inland Water Transport*	Tripartite	Statutory	UBT-BTB CSC/ACV-Transcom	UNC/UCV, General Action Committee of the Belgian Inland Navigation Organisations
BG	Sub-sectoral Council for Tripartite Cooperation in Water Transport, Ministry of Transport, Information Technology and Communications (MTITC)	Tripartite	Statutory	FTTUB FTW Podkrepa SSB	Bulgarian Industrial Capital Association (BICA) Bulgarian Industrial Association (BIA) Confederation of Employers and Industrialists in Bulgaria (CEIB) Bulgarian

					Chamber of Commerce and Industry (BCCI) Bulgarian Shipowners Association (BSA)
DK	Uddannelsesrådet for de maritime uddannelser (Danish Maritime Educational Council) Skipper training	Tripartite	Statutory	Danish Metalworkers' Union, Dansk Metal 3F Danish Engineers' Association, MMF SL	Danish Maritime Authority, Søfartsstyrelsen Danish Shipowners' Association, Danmarks Rederiforening Car Ferry Shipowners' Association, Bilfærgernes Rederiforening Shipowners' Association for Smaller Vessels
FI	Merimiesasiain neuvottelukunta (Delegation of seafarers' issues) Deals with social and labour issues of seafarers	Tripartite	Statutory	SMU SKL SLPL	SMLY Finnish Shipowners' Association (Suomen Varustamot)
FR	OPCA Transports et Services Provides professional training	Bipartite	By law and agreement	FNPD CGT/SMMP PSCN CFE CGC FEETS-FO FGTE CFTD CFTC UNSA Transport	Armateurs de France UPF UNIM CAF
IT	Osservatorio Nazionale (National Observatory) Monitoring and research tasks	Bipartite	Agreement	FILT CGIL FIT CISL UILTRASPORTI UGL Trasporti	AGENS/Federtrasporto ASSTRA ANAV ANEP

				Faisa Cisa Fast Mobilità Confisal OR.S.A. Ferrovie	
LU	Follow-up committee Working time, labour-related dispute	Bipartite	Agreement (sectoral agreement on working time)	OGBL LCGB	Fedil Barging
PL	Council for the Promotion of Inland Water Transport Evaluates projects of financial plans regarding managing of the Water Transport Fund and the Reserve Fund	(potentially) Tripartite	Statutory	None	ZPAŚ
SK	Sector tripartite from representatives of the Ministry, employers and employees for water transport issues	Tripartite	Agreement on cooperation in implementing the economic and social partnership	Association of Trade Unions of Transport, Post and Telecommunications	Union of Employers of Transport, Posts & Telecommunications of the SR Union of Building Societies of Slovakia

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*The non-profit organisation financed by the Flemish government stopped its activities at the end of 2017; it is to a large extent succeeded by the Expert Centre Inland shipping. All the employer organisations are members of the board, plus six other professional associations.

3. European level of interest representation

In this chapter, the representativeness of the social partners at European level is assessed in three ways. Firstly, the membership strength of ETF, EBU and ESO is described based on the collective coverage of their national affiliates in each of the EU Member States.

Secondly, the capacity to negotiate of the European social partners is analysed; this is their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. On the one hand, this depends on how the European-level organisations have procedures to obtain a mandate for negotiations and for getting approval from the members to sign texts, and on the other hand, this depends on the number of countries in which the European associations have members involved in collective bargaining.

Finally, every representativeness study also measures the limits of the representativeness of social partners involved in ESSDC by counterweighting the representativeness of other European associations and the national organisations not represented by ETF, EBU or ESO in the ESSDC for the IWT sector.

Membership domain: European Transport Workers' Federation (ETF)

ETF was founded in 1999 as a pan-European trade union organisation that consists of transport trade unions from the EU, the European Economic Area and Central and Eastern European countries. ETF has affiliated unions that organise workers in railways, road transport and logistics, maritime transport, ports and docks, inland waterways, civil aviation, fisheries and tourism services, and is involved in several transport-related ESSDCs. ETF covers all three NACE codes (50.30, 50.40 and 52.22) of the IWT sector. ETF operates both as the European regional organisation of the ITF (The international transport federation is a global trade union organisation). ETF is at the same time affiliated at cross-sector level to the European Trade Union Confederation (ETUC). Overall, ETF represents more than 5 million transport workers from more than 230 transport unions and 42 European countries.

Being affiliated to the ITF at global level or to a national cross-sectoral member organisation of the ETUC are the conditions for a trade union to become member of ETF, besides subscribing to the aims of ETF and paying its affiliation fees. Applications for affiliation to ETF are submitted to its executive, which first consults the unions that are already affiliated from that country. The executive can grant observer status to trade unions with specific rights and obligations, as foreseen in rule II of the ETF statutes.

Of the 66 national IWT sector trade unions that have been included in this study, there are 46 (70%) that are affiliated to ETF. This means that in 20 of the 22 EU Member States where there is a national IWT sector trade union, there is one affiliated to ETF.

Table 23: Sector-related trade unions affiliated to ETF

EU Member State	Trade unions affiliated to ETF			Trade unions not affiliated to ETF	
	Names of trade unions affiliated to the ETF	NACE 50.30	NACE 50.40		NACE 52.22
AT	vida				GPA-djp
BE	BTB-UTB', CSC/ACV-Transcom				
BG	FTTUB, STU				
HR	SPH				
CY					
CZ	OSD, OSN				
DK	Serviceforbundet, HK/Privat, SL, 3F				
EE	EMSA				
FI	SMU, JHL, SKL, SLPL				Luotsiliitto
FR	FEETS-FO, PSCN CFE CGC, UNSA Transport, FGTE CFDT				FNPD CGT
DE	ver.di				
HU					KDSZSZ, VDSZ
IE	SIPTU, IMPACT				
IT	FILT-CGIL, FIT-CISL, UILTRASPORTI				Faisa CisaI, UGL FNA, Federmanager
LV	ŪTAF				
LT					
LU	OGBL, LCGB				
NL	NINL/Nautilus (FNV), CNV Vakmensen				
PL					
PT	Oficiaismar				SIMAMEVIP, STFCMM, SITEMAQ, SEMM, SINCOMAR, SMMCMM, SITESE
RO	FNSP, FSTC				
SI					
SK					
ES	FSC-CCOO, ELA – Zerbitzuak, FeSMC-UGT				SAME
SE	SEKO, Transport, Unionen, SBF, Ledarna				SRAT, Sveriges Ingenjörer
UK	Nautilus International, Rail, Maritime and Transport Union, Unite the Union				UNISON

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

In 12 EU Member States, all the IWT sector-related trade unions are represented in the ESSDC through their affiliation to ETF. This is the case for Belgium, Bulgaria, Croatia, the Czech Republic, Denmark, Estonia, Germany, Ireland, Latvia, Luxembourg, the Netherlands and Romania. In eight EU Member States there are IWT sector-related trade unions affiliated to ETF, while other sector-related trade unions are not affiliated to ETF.

Looking back at Table 11, it can be confirmed that in 17 EU Member States, ETF has an affiliate that covers the entire IWT sector. Table 11 shows the IWT sector trade unions that are members of ETF. It can be seen that 37 of the 66 IWT sector trade unions are involved in collective bargaining and are also members of ETF. Altogether, the ETF has an affiliate that is involved in collective bargaining in the IWT sector in 16 EU Member States, out of the 19 EU Member States in which there is collective bargaining

Membership domain: European Barge Union (EBU)

EBU was established in December 2001. It distinguishes itself from ESO in orienting itself mainly to larger shipping companies and operators, however not excluding independent skippers. In Belgium, two national associations representing single barge owners are affiliated to EBU. In Germany, two cooperatives of independent skippers (MSG and Deutsche Transport-Genossenschaft Binnenschifffahrt eG – DTG) are affiliated to Bundesverband der Deutschen Binnenschifffahrt e. V. (BDB), the German member organisation of EBU. On the EBU website, the organisation claims to be ‘the European employers’ organisation representing the majority of the inland navigation freight and passenger carrying industry on a Pan-European level’.

Its members are the national associations of barge owners and barge operators as well as international associations in the field of inland navigation and related areas. EBU’s official members are the national associations representing barge owners and barge operators. Full membership is open to all national organisations of the European inland shipping trade which, with the exclusion of any economic business activities, are aimed at the defence of the interests of inland shipping enterprises. Corresponding membership can be granted to organisations and companies that are interested in inland navigation transport and related issues. Article 3 of the EBU statutes governs issues regarding EBU membership. The executive of EBU can propose an organisation to become affiliated to the general assembly, which decides upon this with a 75% majority.

Of the 36 IWT sector employer organisations, 10 (28%) are affiliated to EBU. In eight of the 16 EU Member States where an employer organisation was found (50%), EBU has an affiliate. There are eight countries where there is an IWT sector employer organisation, but there are no members that are affiliated to EBU (see Table 24).

Table 24: Sector-related employer organisations affiliated to EBU

EU Member State	50.30 Inland passenger water transport	50.40 Inland freight water transport	52.22 Service activities	Employer organisations affiliated to EBU	Employer organisations not affiliated to EBU
AT				WKÖ-FVALS	
BE				Algemeen Aktiecomité der Belgische Binnenvaarts, UNIZO (Aequitas), Unie der Continentale Vaart	FEB/VBO, BVE, VBR, Ons recht/Notre droit, WF-FE
BG					
HR					
CY					

CZ				AVP-CZ	SD ČR
DK					DI, Danske Rederier
EE					
FI					SMLY, PALTA, AVAINTA
FR				CAF	CNBA
DE				BDB	BDS, VKA
HU					Magyar Vasúti-, Vízi- és Légiközlekedési Szövetség
IE					
IT					ASSTRA, Confetra, Conftrasporto, CNA Fita
LV					
LT					
LU				Fedil Barging	
NL				CBRB	BLN
PL					ZPAŚ
PT					AATFL, AAMC
RO				A.A.O.P.F.R. Galati	
SI					
SK					
ES					
SE					Sveriges Hamnar, Arbetsgivarverket, Almega Tjänsteföretagen
UK					CBOA

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

In Table 17, the IWT employer organisations that are a member of EBU are marked in pink. Nine of the ten employer organisations affiliated to EBU are involved in collective bargaining. These organisations can be found in Austria, the Czech Republic, France, Germany, Luxembourg and the Netherlands. In six of the eight countries where there is an employer organisation affiliated to EBU, there is at least one that is involved in collective bargaining.

EBU has member organisations covering passenger IWT in six EU Member States: Austria, Belgium, the Czech Republic, France, the Netherlands and Romania. For freight IWT, EBU also covers these six EU Member States, plus a seventh: Luxembourg. For the IWT service activities, EBU has members in Austria, the Czech Republic, the Netherlands and Romania.

The membership domain of EBU, based upon the affiliated employer organisations, is extended with corporate members from Austria, the Czech Republic and Ireland. Danu Transport is the corporate member of Austria, and is affiliated to a national employer organisation that is a member of EBU. Of special relevance is the Irish company Waterways Ireland, as it is involved in collective bargaining and EBU does not have an employer organisation as a member in Ireland, and nor has ESO. Therefore, this corporate member adds to the number of EU Member States in which EBU has an affiliate involved in collective bargaining.

Table 25: Corporate members of EBU

	Corporate members of EBU	NACE 24.1	NACE 24.2	NACE 24.3	Number of employees in the country	Employees in other EU Member States	Involvement in collective bargaining	Affiliation to a national employer organisation
AT	Danu Transport	No	Yes	Yes	25	n/a	No	FVALS
CZ	The Waterways Directorate	No	No	No	28	n/a	No	n/a
CZ	Evropská vodní doprava-sped, s. r. o.	Yes	Yes	Yes	57	n/a	n/a	The Transport Union of the Czech Republic
IE	Waterways Ireland	Yes	Yes	Yes	336	n/a	Yes	n/a

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Membership domain: European Skippers' Organisation (ESO)

ESO was founded in 1975 to represent the interests of the European private inland shipping entrepreneurs at the European level. Initially the organisation only represented individual skippers owning and exploiting their own ship. Over the years, the sector has, however, transformed in the sense that some skippers have also expanded to own more than one ship. ESO's Dutch member organisation, Koninklijke BLN-Schuttevaer (BLN), has among its members individual skippers owning or exploiting sometimes up to nine ships. These expansions have especially occurred in inland waterway tanker shipping.

Of the 36 IWT sector employer organisations, 8 (22%) are affiliated to ESO. The ESO council is composed of representatives of Belgian, French, German, Dutch, Polish and British IWT organisations. ESO is heavily involved in discussion with the European Commission (DG-MOVE) and the CCNR, participating in many relevant working groups. Together with EBU, a nautical-technical commission has been formed to advise the European Commission and CCNR.

It is Article 3 of the statutes of ESO that determines which organisations can become members and how. Requirements for membership are that national organisations represent individual skippers, that they adhere the ESO objectives, and pay a contribution fee. To become member, a request is to be issued to the ESO secretariat, after which the founding members need to agree with a 75% majority.

Table 26: Sector-related employer organisations affiliated to ESO

EU Member State	50.30 Inland passenger water transport	50.40 Inland freight water transport	52.22 Service activities	Employer organisations affiliated to ESO	Employer organisations not affiliated to ESO
AT					WKÖ-FVALS
BE				BVE, VBR, Ons recht/Notre droit,	Algemeen Akticomit� der Belgische Binnenvaarts, UNIZO (Aequitas), Unie der Continentale Vaart, FEB/VBO, WF-FE
BG					
HR					
CY					

CZ					SD ČR, AVP-CZ
DK					DI, Danske Rederier
EE					
FI					SMLY, PALTA, AVAINTA
FR				CNBA	CAF
DE				BDS	BDB, VKA
HU					Magyar Vasúti-, Vízi- és Légiközlekedési Szövetség
IE					
IT					ASSTRA, Confetra, Conftrasporto, CNA Fita
LV					
LT					
LU					Fedil Barging
NL				BLN	CBRB
PL				ZPAŚ	
PT					AATFL
RO					A.A.O.P.F.R. Galati
SI					
SK					
ES					
SE					Sveriges Hamnar, Arbetsgivarverket, Almega Tjänsteföretagen
UK				CBOA	

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

ESO has member organisations covering both passenger and freight IWT in five EU Member States: Germany, France, the Netherlands, Poland and the UK. In Belgium, the ESO affiliates only cover freight IWT activities. As for IWT services, ESO has member organisations in the Netherlands and the UK covering those IWT services.

In Table 17, the IWT employer organisations that are a member of ESO are marked in blue. It can be seen there that none of the employer organisations that are affiliated to ESO are involved in collective bargaining. According to the data collected from the national correspondents, there are no corporate members of ESO that can be considered as part of this study.

In summary, there are six EU Member States in which there can be found an employer organisation that is involved in collective bargaining, without being affiliated to either EBU or ESO. These countries are Denmark, Finland, Hungary, Italy, Portugal and Sweden.

IWT sector representativeness of ETF, EBU and ESO

Table 27 (below) summarises the IWT sector representativeness of ETF, EBU and ESO with their respective affiliated trade unions and employers organisations. There are 66 IWT sector trade unions in 22 EU Member States, of which 46 trade unions (70%) from 20 EU Member States are a member of ETF. From the 56 IWT sector trade unions involved in collective bargaining, 37 (66%) are affiliated. ETF has a member involved in collective bargaining in 16 EU Member States.

As for the IWT sector employer organisations, there are 36 organisations in 16 EU Member States, of which 18 (47%) are affiliated to either EBU or ESO in 10 different Member States. Of the 27 employer organisations involved in collective bargaining, there are nine (33%) that are affiliated to EBU, and as such

represented in the IWT sector ESSDC. There is no collective bargaining taking place in any of the affiliates of ESO. EBU has a member organisation in eight of the 16 EU Member States where there is an employer organisation and, in seven EU Member States, EBU has an employer organisation member that is involved in collective bargaining. In addition, two corporate members are involved in collective bargaining. ESO has members in six Member States.

Table 27: Membership structure of ETF, EBU and ESO*

	Number of organisations	Number of Member States with organisation(s)	Number of organisations involved in collective bargaining	Number of Member States with organisation(s) involved in collective bargaining
All sector-related trade unions	66	22	56	19
Affiliates of ETF Europe	46	20	37	16
% affiliated	70%	91%	66%	84%
	Number of organisations	Number of Member States with organisation(s)	Number of organisations involved in collective bargaining	Number of Member States with organisation(s) involved in collective bargaining
All sector-related employer organisations	36	16	27	13
Employer organisations affiliated to EBU (direct and indirect)	10	8	9	7
Employer organisations affiliated to ESO (direct and indirect)	8	6	0	0
Combined total of ESO and EBU	18	10	9	7
% affiliated	50%	62%	33%	54%
Corporate members EBU	4	3	2	2
Additional impact corporate members EBU				1

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*Based upon information on the trade unions and employer organisations that have been included as a part of this study (for more information, see Chapter 2)

Table 28: Affiliations in EU Member States

		At least one trade union affiliated to ETF	At least one ETF affiliate involved in collective bargaining	At least one employer organisation affiliated to EBU or ESO	EBU or ESO affiliate involved in collective bargaining
EU Member States with cross-border interconnected inland waterways	AT	Yes	Yes	Yes	Yes
	BE	Yes	Yes	Yes	Yes
	BG	Yes	Yes	No	No
	HR	Yes	No	No	No
	CZ	Yes	Yes	Yes	Yes
	FR	Yes	Yes	Yes	Yes
	DE	Yes	Yes	Yes	Yes
	HU	No	No	No	No
	LU	No	No	Yes	Yes
	NL	Yes	Yes	Yes	Yes
	PL	No	No	Yes	No
	RO	Yes	Yes	Yes	No
	SK	No	No	No	No
	SI	No	No	No	No
EU Member States with inland waterways that are not cross-border interconnected	DK	Yes	Yes	No	No
	EE	Yes	No	No	No
	ES	Yes	Yes	No	No
	FI	Yes	Yes	No	No
	IE	Yes	Yes	Corporate member	Corporate member
	IT	Yes	Yes	No	No
	LT	No	No	No	No
	PT	Yes	No	No	No
	SE	Yes	Yes	No	No
	UK	Yes	Yes	Yes	No
EU Member States without inland waterways	CY	No	No	No	No
	LV	Yes	No	No	No

Other European trade union associations

The representativeness of ETF is limited in a two ways. First, there are EU Member States where ETF does not have an affiliated trade union. The second limitation is the other European trade union associations to which the sector-related trade unions are affiliated. These are listed in green in Table 29 (below) for each of the EU Member States. This leads us to the conclusion that ETF Europe is the only European trade union association that is IWT sector-related.

Table 29: Sector-related trade unions affiliated to other European associations

EU Member State	Trade unions affiliated to ETF	Trade Unions not affiliated to ETF	Other European trade union associations	National trade unions affiliated to other associations
AT	vida	GPA-djp	EFFAT	vida, GPA-djp
			EPSU	vida, GPA-djp
			UNI	vida
			ETUC	vida
			IndustriALL	GPA-djp
BE	UBT-BTB, CSC/ACV-Transcom		ETUC	CSC/ACV-Transcom
BG	FTTUB, STU			
CZ	OSD, OSN			
DE	ver.di			
DK	Serviceforbundet, HK/Privat, SL, 3F		UNI Europa	Serviceforbundet HK/Privat 3F
			EFFAT	3F
			IndustriALL	3F
EE				
ES	FSC–CCOO, ELA – Zerbitzuak, FeSMC-UGT	SAME	ETUC	FeSMC-UGT
FI	SMU, JHL, SKL, SLPL	Luotsiliitto	European Boatmen's Association	SMU
			EMPA	Luotsiliitto
FR	FEETS-FO, PSCN CFE CGC, UNSA Transport	FNPD CGT		
HR				
HU	VDSZ	IndustriALL Europe	VDSZ	IndustriALL Europe
IE	SIPTU, IMPACT			
IT	FILT-CGIL, FIT-CISL, UILTRASPORTI	Faisa CisaI, UGL FNA, Federmanager	FICT	Federmanager
			CEC	Federmanager
LT				
LU	OGBL, LCGB			
LV	ŪTAF			
MT				
NL	NINL/Nautilus, CNV Vakmensen			
PL				
PT	Oficiaismar	SIMAMEVIP, STFCMM, SITEMAQ, SEMM, SINCOMAR, SMMCM, SITESE	CESMA	SINCOMAR
			UNI Europa	SITese

RO	FNSP	FSTC		
SE	SEKO, Transport, Unionen, SBF, Ledarna	SRAT, Sveriges Ingenjörer	EMPA	SRAT
SI				
SK				
UK	Nautilus International, Rail, Maritime and Transport Union, Unite the Union	UNISON		

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Other European employer organisations and EU business associations

A similar twofold assessment of the limitations of the representativeness of EBU and ESO can be made. Firstly, by considering the EU Member States in which EBU and ESO do not have an affiliated employer organisation as well as those where there are sector-related employer organisations involved in collective bargaining that are not affiliated to EBU and ESO. Secondly, by considering the representativeness of other IWT sector-related European employer organisations or EU business associations.

Although not recognised as a European employer organisation, Inland Navigation Europe (INE) is another organisation of interest within the IWT sector. The goal of INE is to promote waterway transport in Europe, along with the EU policy of doubling the waterway's transport share and improving the economics and sustainability of transport in Europe, which occurs through practical projects, concerted promotion and coherent advocacy within the EU. Through their work, INE has been involved in the creation of a dedicated EU waterway transport action plan (Naiades), the integration of waterways in the Trans-European Transport Network (TEN-T), increasing the EU budget for waterways and the deployment of River Information Services (RIS), and the extension of de minimis to IWT. INE has 11 full members in Austria, Belgium, France, Italy, Luxembourg, the Netherlands, Poland, Portugal and Slovakia. Membership consists of relevant government ministries/agencies, river associations and port authorities. The Dutch employment organisation BLN is also listed as a member of INE.

Table 30: Other related employer organisations

EU Member State	Employer organisations affiliated to EBU or ESO	Employer organisations not affiliated to EBU or ESO	Other European employer associations	National employer associations affiliated to these associations
AT	WKÖ-FVALS			
BE	Algemeen Aktiecomité der Belgische binnenvaart, Unie der Continentale vaart, UNIZO (Aequitas), BVE,	FEB/VBO WF-FE		

	VBR, Ons recht/Notre droit			
BG				
CY				
CZ	AVP-CZ	SD ČR		
DE	BDB, BDS	VKA		
DK		DI, Danske Rederier	BusinessEurope ESCA	DI Danske Rederier
EE				
ES				
FI		SMLY, PALTA, AVAINTA		
FR	CAF, CNBA			
HR		CEA	BusinessEurope	CEA
HU		Magyar Vasúti-, Vízi- és Légitársasági Szövetség		
IE				
IT		ASSTRA, Confetra, Conftrasporto, CNA Fita	CEEL CLECAT ESCLA UEAPME	Confetra Confetra Confetra CNA Fita
LV				
LT				
LU	Fedil Barging			
NL	CBRB, BLN		INE	BLN
PL	ZPAŚ			
PT		AATFL	ESCA	AAMC
RO	A.A.O.P.F.R. Galati		P.D.I	A.A.O.P.F.R. Galati
SE		Sveriges Hamnar, Arbetsgivarverket,	ESPO European Rail	Sveriges Hamnar Arbetsgivarverket

		Almega Tjänsteförretagen	Infrastructure Managers	
			CEEP	Arbetsgivarverket
			EUPAN	Arbetsgivarverket
			EFEE	Arbetsgivarverket
SI				
SK		UDPT SR		
UK				

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

The second limitation to the representativeness of EBU and ESO comes from the other EU employer organisations and EU business associations to which national employer organisations are affiliated. These are marked in blue in the table above. Several other EU employer associations and business associations appear here from the analysis in the table below.

Table 31: Other EU associations with IWT sector national employer organisations as members

Other EU employer organisation/EU business association		Number of EU Member States with a sector-related employer organisation involved in collective bargaining (according to our bottom-up data collection)	Number of EU Member States with an affiliate organisation according to their website	IWT sector-related
Abbreviation	Full name			
BusinessEurope	BusinessEurope	2	All EU Member States	No
CEEL		1		
CLECAT	European Association for Forwarding, Transport, Logistics and Customs Services	1	PT, UK, BE, ES, DE, IT, NL, FI, SI, HR, BG, PL, SE, FR, SK, AT	Yes
CEEP	European Centre of Employers and Enterprises providing Public Services	1	AT, NL, BE, LU, BG, CY, DK, FI, FR, DE, HR, IT, MT, PT, ES, SE, UK	No
ECSA	European Community Shipowners' Associations	2	BE, HR, CY, DK, EE, FI, FR, DE, GR, IE, IT, LT, LU, MT, NL, PT, SI, ES, SE, UK	Yes

ESCLA		1		
EFEE	European Federation of Education Employers	1	BE, BG, HR, CY, FI, DE, HU, IE, IT, LV, MT, NL, PT, RO, SK, SI, SE, UK	No
EUPAN	European Public Administration Network	1	n/a	No
EIM	European Rail Infrastructure Managers	1	ES, DK, BE, PT, UK, PO, NL, FR, FI, SE	No
UEAPME	European Association of Craft and Small and Medium-sized Enterprises	1	All EU Member States (except from the UK)	No

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

What is clear from the above table is that there are very few sector-related employer organisations that are represented within the IWT sector. Several employer organisations are related to more general non-sector-related organisations, such as UEAPME and BusinessEurope. More sector-related is ESCA, which is a trade association representing the national shipowners' associations of the EU and Norway. ECSA promotes the interests of European shipping so that the industry can best serve European and international trade in a competitive and liberal business environment. However, only two employer organisations are affiliated with ECSA.

Capacity to negotiate of ETF, EBU and ESO

Over the years, ETF, EBU and ESO have agreed on a number of texts, one of which was the February 2012 agreement that is being implemented via Directive 2014/112/EU. With this, the social partners have, in practice, proven their capacity to negotiate and agree upon binding agreements.

Table 32: Agreed texts by ETF, EBU and ESO Europe

26-07-2016	Joint letter to European Commission (DG Move) concerning the 'legislative framework for inland navigation'
27-08-2015	Joint letter to the CCNR's Committee on social issues, employment and vocational training (STF) concerning the position of the European Social Partners with regard to a practical test on a simulator or onboard
04-07-2015	Joint letter to the STF Committee of the CCNR concerning a joint proposal regarding adaptations of the regulations for Rhine navigation personnel (RNP)
16-09-2013	Joint position on professional qualifications and training standards for crew members on IWT vessels
15-02-2012	European agreement concerning certain aspects of the organisation of working time in inland water transport (2012) see Council Directive 2014/112/EU (11 December 2014)
30-11-2009	Joint sectoral contribution to the Commission's consultation on the future of transport
14-08-2009	Joint declaration concerning social security provisions in IWT
09-06-2005	Rules of Procedure for the ESSDC for the IWT sector
21-01-1998	Joint conclusion of the working party 'living and working conditions' in the IWT sector
15-10-1997	Joint opinion on the question of opening up the EU to operators from outside the EU
02-12-1994	Resolution concerning the economic situation in the IWT sector in Germany, France and the Benelux countries, and measures to organise the transport market and to monitor the equality of social treatment

04-03-1993	Joint opinion concerning a European market organisation system of the IWT sector
01-02-1993	Proposal to the European Commission for a regulation applicable to passenger and goods vessels plying the Community's inland waterways with the exception of the Rhine

Under the ETF Constitution, the Inland Waterways Section represents the interests of inland waterways workers in Europe. All affiliated trade unions who declare members in the Inland Waterways Section shall have, in accordance with the ETF Constitution, a mandate within the Section and may appoint one full member. ETF has as governing bodies its Congress, its Executive Committee and its Management Committee. The Executive Committee meets at least twice per year and is, as such, the governing body of ETF between Congresses. It decides on political decisions necessary for the implementation of the general strategy and on positions to be taken in relation to the European institutions. While the ETF Management Committee also meets twice per year, it operates within the mandate given by the Executive Committee. It can thus be assumed that IWT social partner positions are approved within the ETF executive.

The Section elects one chair and three vice-chairs from among its members: one as a representative of female workers, one as a representative for young workers and one as chair of the Sectoral Social Dialogue Committee. The Steering Committee deals with the everyday affairs of the Section and is entitled to issue position papers at short notice on behalf of the Section. The Steering Committee of the Inland Waterways Section consist of the chair and the three vice-chairs. The President of the ITF Inland Waterways Section, in the case that they are from Europe (otherwise a European vice-president), is an associated member of the Steering Committee. Each affiliated trade union is entitled to one vote. Decisions and elections adopted by the Section are carried out on the basis of a simple majority of votes. In exceptional and duly justified cases, a membership vote among members declared to the Section may be held on request and notified to the Secretariat in advance, at least two weeks prior to the election. The Steering Committee and the Secretariat nevertheless have the duty to explore all other solutions likely to result in a compromise.

According to the statutes of 1992, ESO has as governing bodies its General Assembly and an Executive Committee. Normally decisions are taken with three-quarters majorities, though each country has a veto on matters concerning only that country. The ESO statutes do not specify the procedure: for example, how a mandate is given and how decisions are made within ESO on joint texts or agreements.

EBU was founded in 2001–2002 and established as an association under Belgian law. Its statutory bodies are its General Assembly (Art 5), its Executive Committee (Art 7), its Board of Management (Art 6), its commissions and working groups (Art 8), and its Secretariat (Art 9). According to the articles of association, the committees are entitled to establish positions within the framework of their specific area. These positions are submitted to the Board of Management for formal approval. The Board of Management used to take decisions by consensus and, in line with the articles, by simple majority. This was equally the procedure followed when adopting the 2012 agreement.

Effective participation of organisations in the IWT sector ESSDC

Looking at the effective participation in the ESSDC for the IWT sector over the years 2016 and 2017, there were representatives involved from trade unions from EU Member States and from employer organisations from 14 EU Member States.

Table 33: Effective participation in the ESSDC for the IWT sector

Trade union participation in the ESSDC for the IWT sector in 2016–2017 from the following EU Member States	BE, BG, CZ, DE, FR, HR, NL, RO, UK
Employer organisations' participation in the ESSDC for the IWT sector in 2016–2017 from the following EU Member States	BE, DE, FR, NL

Source: Eurofound and European Commission

There are 11 EU Member States where ETF has an IWT sector-related trade union as a member organisation but that did not participate in meetings of the ESSDC in 2016 or 2017. As for the employer organisations, there are six EU Member States where EBU or ESO have a member organisation, but that did not participate in meetings of the ESSDC in 2016 or 2017. From Table 33 (above) it appears that in 2016 and 2017 there were only participants from Rhine countries, and not from Danube countries.

Member organisations that were not directly represented in meetings of the ESSDC are normally kept informed about developments in the ESSDC via their participation in the meetings of statutory bodies of their European organisation, or via its intranet or website.

4. Conclusions

The inland water transport (IWT) sector has a workforce of about 45,500 employees in the EU. The employment in the IWT sector is concentrated in a relatively small number of EU Member States. There are only four EU Member States with more than 5,000 employees in the IWT sector: France, Germany, the Netherlands and Romania. These four countries together have an IWT workforce of almost 35,000 (77%) of the entire EU workforce (see Tables 5 and A5). Of the 24 EU Member States that have inland waterways in their territory, there are 14 with cross-border interconnected inland waterways. There are, however, also EU Member States without inland waterways that do have companies employing workers in IWT in other EU Member States (see Tables 7 and 8).

The European Sectoral Social Dialogue Committee (ESSDC) for the IWT sector was established in 1999. It is made up of the European Transport Workers' Federation (ETF), the European Barge Union (EBU) and the European Skippers' Organisation (ESO). The major achievement of the IWT European social partners is their agreement of February 2012 that has been transposed via Directive 2014/112/EU. With this, ETF, EBU and ESO are mutually recognised sectoral social partners at European level in the IWT ESSDC.

In this study, 66 IWT sector-related trade unions were identified in 20 EU Member States. ETF has 46 affiliated trade unions in 20 EU Member States where there is a national IWT sector trade union and, in 18 EU Member States, ETF has an affiliate that covers the entire IWT sector. Of the 46 affiliated trade unions, 37 are involved in IWT sector-related collective bargaining in 16 EU Member States.

There are 9 EU Member States where there are IWT sector trade unions not affiliated to ETF (see Table 29). In seven of these EU Member States, some other trade unions are affiliated to ETF, and it remains unclear whether the most representative IWT sector trade unions in those eight countries are therefore in fact represented via ETF in the ESSDC. For France, for example, information has been provided indicating that most of the representative unions are members of ETF. It is also worth mentioning that in Belgium, Germany and the Netherlands, all trade unions are affiliated to ETF. Among the EU member states with the largest IWT workforce, it is thus only in Italy and Romania where it is not clear how representative the trade unions are that are not affiliated to ETF.

As for other European associations with affiliated trade unions in the IWT sector, none of them are IWT sector-related.

This leads to the conclusion that **ETF is the only and thus the most representative European trade union organisation in the IWT sector** with a proven capacity to negotiate and participate effectively in the ESSDC.

This study identified 36 IWT sector-related employer organisations in 16 EU Member States, 27 of which are involved in collective bargaining in 13 EU Member States.

EBU has 10 affiliated employer organisations in eight EU Member States. Nine of these 10 employer organisations are involved in collective bargaining. These organisations can be found in Austria, Belgium, the Czech Republic, France, Germany, Luxembourg and the Netherlands. With the sole exception of Romania, in all the countries where there is an employer organisation affiliated to EBU, there is at least one that is involved in collective bargaining. Furthermore, in Ireland, EBU has a corporate member that is involved in collective bargaining.

ESO has eight affiliated employer organisations in six EU Member States (Belgium, Denmark, France, the Netherlands, Poland, and the UK). None of the employer organisations that are affiliated to ESO are involved in collective bargaining.

There are nine EU Member States in which there can be found an employer organisation that is involved in collective bargaining but that is not affiliated to either EBU or ESO (see Table 30). These countries are Belgium, the Czech Republic, Denmark, Finland, Germany, Hungary, Italy, Portugal and Sweden. Only in Sweden and Portugal do neither EBU nor ESO have an affiliate involved in collective bargaining.

As for other European associations with affiliated employer organisations in the IWT sector, there are very few that are represented within the IWT sector. Several employer organisations are related to more general non-sector-related organisations, such as European Association of Craft and Small and Medium-sized Enterprises (UEAPME) and BusinessEurope. More sector-related is the European Community Shipowners' Association (ECSA), a trade association representing the national shipowners' associations of the EU and Norway. ECSA promotes the interests of European shipping so that the industry can best serve European and international trade in a competitive and liberal, free business environment. However, only two employer organisations are affiliated with ECSA.

This leads to the conclusion that **ESO and EBU are the most representative European employer organisation in the IWT sector** with a proven capacity to negotiate and participate effectively in the ESSDC.

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All Eurofound publications are available at www.eurofound.europa.eu

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Annex 1: Details of individual organisations

Table 34: Names and abbreviations of IWT trade unions

EU Member State	Abbreviation in English	Full name in English	Full name in original language
AT	vida	vida (comprising three sections: transport; social, personal and health services; and private services)	vida
AT	GPA-djp	Union of Salaried Private Sector Employees, Graphical Workers and Journalists	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier
BE	BTB-UTB	Belgian Transport Union	Belgische Transportbond
BE	CSC/ACV-Transcom	Transcom	Transcom
BG	FTTUB	Federation of Transport Trade Unions in Bulgaria	Съюз на транспортните синдикати в България (СТСБ)
BG	STU	Seafarers' Trade Union	Бъл-гар-ски моряшки про-фе-си-о-на-лен съюз
HR	SPH	Seafarers' Union of Croatia	Sindikata pomoraca Hrvatske
CY			
CZ	OSD	Transport Workers' Union	Odborový svaz dopravy
CZ	OSN	Czech Trade Union of Seafarers	Odborový svaz námořníků
DK	Serviceforbundet	National Federation of Trade Unions in the Service Sector	Serviceforbundet
DK	HK/Privat	HK Private (part of HK Danmark)	HK/Privat
DK	SL	Danish Maritime Officers	Søfartens Ledere
DK	3F	United Federation of Danish Workers	Fagligt Fælles Forbund
EE	EMSA	Estonian Seamen's Independent Union	Eesti Mermeeste Sõltumatu Ametiühing
FI	SMU	Finnish Seafarers' Union (FSU)	Suomen Merimies-Unioni
FI	JHL	Trade Union for the Public and Welfare Sectors	Julkisten ja hyvinvointialojen liitto
FI	SKL	Finnish Engineers' Association	Suomen Konepäällystöliitto

FI	SLPL	Finnish Ship's Officers' Union	Suomen Laivanpäällystöliitto
FI	Luotsiliitto	Finnish Maritime Pilots' Association	Luotsiliitto
FR	FEETS-FO	Federation Equipment, Transport, Services (merchant navy division)	Fédération de l'Équipement, des Transports et des Services (secteur marine marchande)
FR	FNPD CGT	National Union of Ports and Dockers	Fédération Nationale des Ports et Docks
FR	PSCN CFE CGC	National union of onshore managers of the maritime sector - French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff – Transport Federation	Syndicat national de l'encadrement des personnels sédentaires des compagnies de navigation – Confédération Générale de l'Encadrement – Confédération générale des cadre – federation Transport
FR	UNSA Transport		Union nationale des syndicats autonome – Transport
FR	FGTE CFDT navigation intérieure	General Federation of Transports and Equipment – French Democratic Confederation of Labour	Fédération Générale des Transports et de l'Équipement – Confédération Française Démocratique Travail
DE	ver.di	United Services Union	Vereinte Dienstleistungsgewerkschaft
HU	KDSZSZ	Association of Transport Workers Trade Unions	Közlekedési Dolgozók Szakszervezeteinek Szövetsége
HU	VDSZ	Federation of the Chemical, Energy and General Workers' Union	Magyar Vegyipari, Energiaipari és Rokonszakmákban Dolgozók Szakszervezeti Szövetsége
IE	SIPTU	Services, Industrial, Professional and Technical Union	
IE	IMPACT	Irish Municipal, Public and Civil Trade Union	
IT	FILT-CGIL	Italian Transport Workers' Federation	Federazione Italiana Lavoratori dei Trasporti – CGIL
IT	FIT-CISL	Italian Transport Federation	Federazione Italiana Trasporti
IT	UILTRASPORTI	Italian Transport Workers' Union	Unione Italiana dei Lavoratori dei Trasporti
IT	Faisa Cisl	Italian Autonomous Federation of Public	Federazione Autonoma Italiana Sindacale Autoferrotranvieri

		Transport Workers	
IT	UGL FNA	UGL – Public Local Transport Union	UGL Federazione Autoferrotranvieri
IT	Federmanager	Federmanager	Federazione Nazionale Dirigenti e dei Quadri Apicali di Aziende Industriali
LV	ŪTAF	Water Transport Trade Union Federation	Latvijas Ūdens transporta arodbiedrību federācija
LT			
LU	OGBL	Trade Union Confederation of Luxembourg	Onofhängege Gewerkschaftsbond Lëtzebuerg,
LU	LCGB	Confederation of Christian Unions in Luxembourg	Lëtzebuerger Chrëschtliche Gewerkschafts-Bond
NL	NINL/ Nautilus (FNV)	Nautilus International Netherlands	Nautilus International Nederland
NL	CNV Vakmensen	Christian National Union Federation Professionals	Christelijk Nationaal Vakverbond Vakmensen
PT	SIMAMEVIP	Union of Workers of the Merchant Marine, Travel Agencies, Forwarders and Fishery	Sindicato dos Trabalhadores da Marinha Mercante, Agências de Viagens, Transitários e Pesca)
PT	STFCMM	Union of River and Coastal Transports and Merchant Marine	Sindicato dos Transportes Fluviais, Costeiros e da Marinha Mercante
PT	SITEMAQ	Union of Seamanship at the Merchant Marine, Energy and Stokers Onshore	Sindicato da Mestrança e Marinhagem da Marinha Mercante, Energia e Fogueiros de Terra
PT	SEMM	Union of the Engineers of the Merchant Marine	Sindicato dos Engenheiros da Marinha Mercante
PT	SINCOMAR	Union of Captains and Officers of the Merchant Marine	Sindicato de Capitães e Oficiais da Marinha Mercante
PT	SMMCMM	Union of Seamanship – Ratings and Catering Staff	Sindicato da Mestrança e Marinhagem de Câmaras da Marinha Mercante
PT	Oficiaismar	Union of Captains, Officers, Pilots, Commissioners and Engineers of the Merchant Marine	Sindicato dos Capitães, Oficiais, Pilotos, Comissários e Engenheiros da Marinha Mercante
PT	SITese	Union of Workers and Technical Staff in Services, Commerce, Restaurants and Tourism	Sindicato dos Trabalhadores e Técnicos de Serviços, Comércio, Restauração e Turismo

RO	FSTC	Federation of Trade Unions 'TRANS-CONEX'	Federația Sindicatelor 'TRANS-CONEX'
RO	FNSP	National Federation of Port Workers' Unions	Federația Natională a Sindicatelor Portuare
SK	OZPVD	Union of Water Transport Workers	Odborový zväz pracovníkov vodnej dopravy
ES	FSC-CCOO	Federation of Citizen Services – Workers' Commissions	Federación de Servicios a la Ciudadanía
ES	FeSMC-UGT	Service for the Mobility of the General Workers' Union	Federación de Servicios para la Movilidad y al Consumo de UGT
ES	ELA – Zerbitzuak	Services Federation of the Basque Solidarity Workers	
ES	SAME	Trade Union of Sea Activities	Sindicato de Actividades del Mar
SE	SEKO	Union for Service and Communications Employees	Facket för Service och Kommunikation
SE	Transport	The Transport Workers' Union	Transportarbetareförbundet
SE	Unionen	Unionen	Unionen
SE	SRAT	Swedish union for professionals with a college degree, specialists and managers in the fields of health, communication and management	SRAT
SE	SBF	Maritime Officers' Association	Sjöbefälsföreningen
SE	Ledarna	Ledarna	Ledarna
SE	Sveriges Ingenjörer	Swedish Association of Graduate Engineers	Sveriges Ingenjörer
UK	Nautilus International		
UK	UNISON		
UK	Unite the Union	Unite	Unite the Union
UK	Rail, Maritime and Transport Union	RMT	

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Table 35: Names and abbreviations of IWT employer organisations

EU Member State	Abbreviation in English	Full name in English	Full name in original language
AT	WKÖ-FVALS	Association of Bus, Aviation and Shipping Companies	Fachverband Autobus-, Luftfahrt- und Schifffahrtunternehmungen
BE	Algemeen Akticomit� der Belgische Binnenvaarts	General Action Committee of the Belgian Inland Navigation Organisations	Algemeen Akticomit� der Belgische Binnenvaart
BE	UNIZO (Aequitas)		
BE	Unie der Continentale Vaart	Union of Continental Navigation	Unie der Continentale Vaart
BE	FEB/VBO	Federation of Belgian Companies	F�d�ration des Entreprises de Belgique
BE	BVE	Union of Self-shippers	Bond van Eigenschippers
BE	VBR	Belgian shipping companies Rhine and IWT	Vereniging Belgische Reders Rijn- en Binnenvaart
BE	Ons recht/Notre droit	Our Right	Ons Recht – Notre Droit
BE	WF-FE	Employers’ federation international trade, transport and logistics	Werkgeversfederatie
CZ	SD �R	The Transport Union of the Czech Republic – Water Transport Section	Svaz dopravy �esk� republiky – sekce vodn� dopravy
CZ	AVP-CZ*		
DK	DI	Confederation of Danish Industry	Dansk Industri
DK	Danske Rederier	Danish Shipping	Danske Rederier
FI	SMLY	Finnish Passenger Ship Association	Suomen Matkustajalaivayhdistys
FI	PALTA	Service Sector Employers	Palvelualojen ty�nantajat PALTA
FI	AVAINTA	Key Employers AVAINTA	Avainty�nantajat
FR	CAF	Committee of Inland Navigation Ship-owners	Comit� des Armateurs Fluviaux
FR	CNBA	National Chamber of Self-Employed Inland Shipping Entrepreneurs	Chambre Nationale de la Batellerie Artisanale
DE	BDB	German Association for inland water transport	Bundesverband der Deutschen Binnenschifffahrt
DE	BDS	German Association for the Self-Employed, Department Inland Water Transport	Bund der Selbst�ndigen Abteilung Binnenschifffahrt
DE	VKA	Confederation of Municipal Employers’ Associations	Vereinigung der kommunalen Arbeitgeberverb�nde
	Magyar	Hungarian Federation for Rail, Water,	Magyar Vas�ti-, V�zi- �s

	Vasúti-, Vízi- és Légiközlek edési Szövetség	and Air Transportation	Légiközlekedési Szövetség
IT	ASSTRA	Transport Association	Associazione Trasporti
IT	Confetra	Italian General Confederation of Transport and Logistics	Confederazione Generale Italiana dei Trasporti e della Logistica
IT	Confrasp orto	Confederation of Transport, Logistics and Shipping	Confederazione del Trasporto, della Logistica e della Spedizione
IT	CNA Fita	National Confederation of Craftsmanship and Small and Medium Enterprises – National Union of Transportation Enterprises	Confederazione Nazionale dell’Artigianato e delle Piccole e Medie Imprese – Unione Nazionale Imprese di Trasporto
LU	Fedil Barging	Fedil Barging	Fedil Barging
NL	CBRB	Central Office for Rhine and Inland Waterways	Centraal Bureau voor Rijn en Binnenvaart
NL	BLN	Royal Inland Waterways Logistics Netherlands Schuttevaer	Koninklijke Binnenvaart Logistiek Nederland Schuttevaer
PL	ZPAŚ	Polish Inland Shipowners Association	Związek Polskich Armatorów Śródlądowych
PT	AATFL	Association of Shipowners in River and Local Transport	Associação dos Armadores de Tráfego Fluvial e Local
RO	A.A.O.P.F.R . Galati	Romanian River Ship Owners and Port Operators Association	Asociatia Armatorilor si Operatorilor Portuari – Fluviali din Romania
SE	Sveriges Hamnar	Ports of Sweden	Sveriges Hamnar
SE	Arbetsgiva rverket	The Swedish Agency for Government Employers	Arbetsgivarverket
SE	Almega Tjänsteför etagen	Almega Service Associations	Almega Tjänsteföretagen
UK	CBOA	Commercial Boat Owners Association	Commercial Boat Owners Association

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*No fact sheet available

**Table 36: Total companies and employment in the IWT sector, 2011–2016
(approximately)**

EU Member State	Year	Number of companies	Total employment	Female employment	Female employment (as % of total employment)	Total sectoral employment (as % of total employment in economy)
AT	2011	95	527	134	25%	0.0%
	2016	114	634	191	30%	0.0%
BE	2011	167				0.1%
	2016	151	2451	690	28%	0.1%
BG	2011	251	2469	494	20%	0.1%

Representativeness of the European social partner organisations: Inland water transport sector

	2016	215	2190	452	20%	0.1%
HR	2011	17	171			
	2016	21	62			
CY	2011	4	725			0.2%
	2016	7	1811			0.2%
CZ	2011		2500			0.1%
	2016		2500			0.1%
DK	2011	128	904	96	11%	0.0%
	2016	172	884	133	15%	0.0%
EE	2011	2				
	2016	4				
FI	2011	145	1499			0.1%
	2016	190	1687			0.1%
FR	2011	1452				
	2016	1663				
DE	2011	914				
	2016	869				
HU	2011		927			0.1%
	2016		1048			0.1%
IE	2011	1				
	2016	1	285			
IT	2011	947	2425	163	7%	0.0%
	2016	1008	2594	160	6%	0.0%
LV	2011	15	106	16	15%	0.0%
	2016	19	179	14	8%	0.0%
LT	2011	33	796			0.0%
	2016	32	555			0.0%
LU	2011					
	2016	139	3000			
NL	2011	4820	12000	2880	24%	0.1%
	2016	5260	13485			0.2%
PL	2011	590	2695			0.0%
	2016	717	3376			0.0%
PT	2011	180				
	2016	115	3056			0.0%
RO	2011	136	2941			0.1%
	2016	464	6699			0.2%
SK	2011	171	1400	300	21%	0.1%
	2016	193	900			0.0%
SI	2011	34	287	33	11%	0.0%
	2016	58	332	79	24%	0.0%
ES	2011	72	769			0.0%
	2016	60	900			0.0%
SE	2011	744				
	2016	692				

UK	2011	258			
	2016	261			

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Table 37: Total employees in the IWT sector (2011–2016)

EU Member State	Year	Total employees	Female employees	Female employees as % of total employees	Total sectoral employees as % of total employment
AT	2011	466	123	26%	0%
	2016	531	173	33%	0%
BE	2011	812	37	5%	
	2016	703	38	5%	0.1%
BG	2011	2330	483	20%	0.1%
	2016	2084	443	21%	0.1%
HR	2011	158			0.02%
	2016	48			0.02%
CY	2011				
	2016				
CZ	2011	2500			0.05%
	2016	2500			0.05%
DK	2011	829	93	11%	0.03%
	2016	803	130	16%	0.03%
EE	2011				
	2016				
FI	2011				
	2016				
FR	2011	15144			
	2016	15322			
DE	2011				
	2016				
HU	2011	927			0.1%
	2016	1048			0.1%
IE	2011				
	2016	285			
IT	2011	1402	140	10%	0%
	2016	1545	151	10%	0%
LV	2011	105	15	14%	0.02%
	2016	168	14	8%	0.03%
LT	2011	791			0%
	2016	555			0%
LU	2011	3969			
	2016	3640			
NL	2011				
	2016	6608			

PL	2011	2109			0.02%
	2016	2592			0.02%
PT	2011				
	2016				
RO	2011	2941			0.06%
	2016	6908			0.17%
SK	2011	1400	300	21%	0.07%
	2016	700			0.03%
SI	2011	262	32	12%	0%
	2016	287	69	24%	0.004%
ES	2011	574			0%
	2016	633			0%
SE	2011	3008			0%
	2016	3034			0%
UK	2011				
	2016				

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Table 38: Employment in freight IWT and in passenger IWT in 2011

	Freight					Passenger					Total
	SE	W	Total	% W	% in freight	SE	W	Total	% W	% in passenger IWT	
NL	4908	5912	10820	55%	42%	731	2357	3088	76%	19%	13908
DE	577	2197	2774	79%	11%	288	2527	2815	90%	17%	5589
FR	577	1096	1673	66%	7%	60	1967	2027	97%	12%	3700
LU	180	2375	2555	93%	10%	13	238	251	95%	2%	2806
IT	231	403	634	64%	2%	993	926	1919	48%	12%	2553
BE	1294	557	1851	30%	7%	326	222	548	41%	3%	2399
RO	14	2067	2081	99%	8%	18	230	248	93%	2%	2329
BG	22	957	979	98%	4%	6	694	700	99%	4%	1679
SE	14	104	118	88%	0%	191	792	983	81%	6%	1101
UK	60	239	299	80%	1%	162	590	752	78%	5%	1051
HU	9	258	267	97%	1%	25	575	600	96%	4%	867
PT	0	0	0		0%	13	840	853	98%	5%	853
CZ	43	474	517	92%	2%	58	225	283	80%	2%	800
PL	98	215	313	69%	1%	103	200	303	66%	2%	616
SK	1	412	413	100%	2%	0	31	31	100%	0%	444
ES	6	38	44	86%	0%	20	324	344	94%	2%	388
FI	1	38	39	97%	0%	28	200	228	88%	1%	267
AT	1	50	51	98%	0%	57	100	157	64%	1%	208
LT	0	0	0		0%	4	141	145	97%	1%	145

DK	8	42	50	84%	0%	12	83	95	87%	1%	145
HR	7	114	121	94%	0%	6	6	12	50%	0%	133
LV	0	88	88	100%	0%	0	17	17	100%	0%	105
EE	0	0	0		0%	1	60	61	98%	0%	61
SI	24	16	40	40%	0%	13	8	21	38%	0%	61
I											
	8075	1765 2	2572 7	69%		3128	13353	1648 1	81%		42208

Source: Ecorys (2013, p. 32). Note: SE = self-employed; W = workers

Table 39: Numbers of employees and self-employed workers in IWT in 2011

	Total no. employed in IWT in 2011	No. of mobile workers	No. of self-employed	% workers	% self-employed	Boat-master	Operational IWT staff	% of boat-masters
NL	13908	8269	5639	59%	41%	6053	7855	44%
DE	5589	4724	865	85%	15%	1337	4252	24%
FR	3700	3063	637	83%	17%	790	2910	21%
LU	2806	2613	193	93%	7%	668	2143	24%
IT	2553	1329	1224	52%	48%	1290	1263	51%
BE	2399	779	1620	32%	68%	1659	740	69%
RO	2329	2297	32	99%	1%	491	1838	21%
BG	1679	1651	28	98%	2%	911	768	54%
SE	1101	896	205	81%	19%	250	851	23%
UK	1051	829	222	79%	21%	263	788	25%
HU	867	833	34	96%	4%	201	666	23%
PT	853	840	13	98%	2%	55	798	6%
CZ	800	699	101	87%	13%	135	665	17%
PL	616	415	201	67%	33%	284	332	46%
SK	444	443	1	100%	0%	89	355	20%
ES	388	362	26	93%	7%	62	326	16%
FI	267	238	29	89%	11%	41	226	15%
AT	208	150	58	72%	28%	88	120	42%
LT	145	141	4	97%	3%	11	134	8%
DK	145	125	20	86%	14%	24	119	17%
HR	133	120	13	90%	10%	20	113	15%
LV	105	105	0	100%	0%	5	101	5%
EE	61	60	1	98%	2%	7	54	11%
SI	61	24	37	39%	61%	38	23	62%
	42208	31005	11203	73%	27%	14772	27440	35%

Source: Ecorys (2013) and Panteia (2014)

Table 40: EU Member States with the highest IWT sector employment*

EU Member State	Total employment	Total sectoral employment as % of total employment in economy	Number of employees	Proportion of employees as % of total employees in national economy
FR	n/a	n/a	15322	n/a
NL	13485	0.2%	6608	n/a
RO	6699	0.2%	6908	0.2%
DE	n/a	n/a	5888	n/a
PL	3376	0.0%	2592	0.0%
PT	3056	0.0%	n/a	n/a
LU	n/a	n/a	3640	n/a
IT	2594	0.0%	1545	0.0%
CZ	2500	0.1%	2500	0.1%
BE	2451	0.1%	703	0.1%
BG	2190	0.1%	2084	0.1%
CY	1811	0.2%	n/a	n/a
FI	1687	0.1%	n/a	n/a
HU	1048	0.1%	1048	0.1%

Source: based on contributions from the Network of Eurofound Correspondents (2016–2017).

*Some information unavailable for Germany, Estonia, France, Sweden and the UK. Employee figures for Germany pertain only to freight and passenger transport

Table 41: Collective bargaining, consultation and affiliations of trade unions in the IWT sector (2015–2017)

	Trade union	Collective bargaining	Collective bargaining coverage	Consultation / frequency	National and European affiliations
AT	vida	Both single- and multi-employer bargaining	400	On an ad-hoc basis	ETF, EFFAT, EPSU, UNI Europa, ETUC, OGB
	GPA-djp	Single-employer bargaining	120	On an ad-hoc basis	IndustriALL, EPSU, EFFAT, EFJ, UNI Europa, ETUC, OGB
BE	BTB-UTB	Both single- and multi-employer bargaining	800	On a regular/institutionalised basis	ETF, ETUC
	CSC/ACV-Transcom	Both single- and multi-employer bargaining		On a regular/institutionalised basis	ETF, ETUC, UNI
BG	FTTUB	Both single- and multi-employer bargaining	206	On a regular/institutionalised basis	ETF, CITUB, ETUC

	STU	No			ETF
HR	SPH	No			ETF, Nautilus Federation, The Union of Autonomous Trade Unions of Croatia
CY					
CZ	OSD	Single-employer bargaining	27	On a regular/institutionalised basis	ETF, ETUC
	OSN	Single-employer bargaining			ETF
DK	Serviceforbundet	Multi-employer bargaining	85		ETF, UNI Europa, Danish Confederation of Trade Unions, LO
	HK/Privat	Multi-employer bargaining			ETF IWT, UNI Europa, Danish Confederation of Trade Unions (LO)
	SL	Multi-employer bargaining	197	On an ad-hoc basis	ETF
	3F	Multi-employer bargaining	150	On an ad-hoc basis	ETF, UNI Europa, IndustriALL, EFFAT, Danish Confederation of Trade Unions (LO)
EE	EMSA*	No			
FI	SMU	Both single- and multi-employer bargaining	1650	On a regular/institutionalised basis	ETF, European Boatmen's Association, SAK, KAF
	JHL	Both single- and multi-employer bargaining	850		ETF, SAK, KAF
	SKL	Multi-employer bargaining	1250	On a regular/institutionalised basis	ETF, STTK, KAF, TP
	SLPL	Multi-employer bargaining	15000	On a regular/institutionalised basis	ETF, STTK, YTY
	Luotsiliitto	Multi-employer bargaining	140	On a regular/institutionalised basis	European Maritime Pilots Association
FR	FEETS-FO	Both single- and multi-employer bargaining	4000	On an ad-hoc basis	ETF, CGT-FO
	FNPD CGT	Both single- and multi-employer bargaining	4000	On an ad-hoc basis	General Confederation of Labour
	PSCN CFE CGC	Both single- and multi-employer bargaining	4000	On an ad-hoc basis	ETF, General Confederation of Labour
	UNSA Transport	Both single- and multi-employer bargaining	4000		ETF, UNSA
	FGTE CFTD	Both single- and	4000	On an ad-hoc	ETF

	navigation intérieure	multi-employer bargaining		basis	
DE	ver.di	Both single- and multi-employer bargaining	5000	On a regular/ institutionalised basis	UNI-ETF, EPSU, DGB
HU	KDSZSZ	Single-employer bargaining	418		Hungarian Trade Union Confederation
	VDSZ	Single-employer bargaining	320		IndustriALL-Europe, Hungarian Trade Union Confederation
IE	SIPTU	Both single- and multi-employer bargaining	285	Information not available	ETF-Europe
	IMPACT	Both single- and multi-employer bargaining	285	Information not available	ETF-Europe, ICTU
IT	FILT-CGIL	Both single- and multi-employer bargaining	1500	On an ad-hoc basis	ETF , CGIL
	FIT-CISL	Both single- and multi-employer bargaining	1500	On an ad-hoc basis	ETF, CISL
	UILTRASPORTI	Both single- and multi-employer bargaining	1500	On an ad-hoc basis	ETF, UIL
	Faisa Cisa	Both single- and multi-employer bargaining	1500	Information not available	CISAL
	UGL FNA	Both single- and multi-employer bargaining	1500	Information not available	UGL
	Federmanager	Multi-employer bargaining	16	On an ad-hoc basis	CEC – European Managers FICT – European Managers in the Transport Industry, CIDA
LV	ŪTAF		0	On an ad-hoc basis	ETF, LBAS
LU	OGBL	Both single- and multi-employer bargaining	3000	On an ad-hoc basis	ETF
	LCGB	Both single- and multi-employer bargaining	3000	On an ad-hoc basis	None (for the Inland Waterway Transport, but ETF for other transport activities)
NL	NINL/ Nautilus int (FNV)	Both single- and multi-employer bargaining	689	On an ad-hoc basis	ETF, FNV
	CNV Vakmensen	Single-employer bargaining	689	On an ad-hoc basis	ETF, CNV
PL					

PT	SIMAMEVIP	Multi-employer bargaining	356	Information not available	FECTRANS, Federation of Unions in the Fishing Sector, General Confederation of Portuguese Worker
	STFCMM	Both single- and multi-employer bargaining	501	Information not available	FECTRANS, Federation of Unions in the Fishing Sector, General Confederation of Portuguese Worker
	SITEMAQ	Both single- and multi-employer bargaining	1000	Information not available	UGT – General Union of Workers
	SEMM	Single-employer bargaining	560	Information not available	SEMM states on its site that it is affiliated to ETF, but SEMM is not mentioned as member in the list provided by the ETF. UGT – General Union of Workers
	SINCOMAR	Both single- and multi-employer bargaining	560	Information not available	CESMA – Confederation of European Shipmasters' Associations, UGT – General Union of Workers
	SMMCMM	Both single- and multi-employer bargaining	560	Information not available	UGT – General Union of Workers
	Oficiaismar			Information not available	ITF, FECTRANS, Federation of Unions in the Fishing Sector, General Confederation of Portuguese Worker
	SITese		488	Information not available	UNI Europa, UGT – General Union of Workers
RO	FSTC	Information not available	9000	On a regular/institutionalised basis	C.N.. Cartel ALFA
	FNSP			On a regular/institutionalised basis	ETF, BNS
SK	OZPVD	Single-employer bargaining	225	On a regular/institutionalised basis	Confederation of Trade Unions of Slovak republic
ES	FSC–CCOO	Single-employer bargaining			ETF, CCOO
	FeSMC-UGT	Single-employer bargaining			ETUC, UGT
	ELA – Zerbitzuak	Information not available		Information not available	ETF
	SAME	Single-employer bargaining	33	Information not available	
SE	SEKO	Multi-employer bargaining	1000	On a regular/institutionalised basis	ETF, LO
	Transport	Multi-employer bargaining		On a regular/institutionalised basis	ETF, LO

				sed basis	
	Unionen	Multi-employer bargaining	200	Information not available	ETF, TCO
	SRAT	Multi-employer bargaining	300	On an ad-hoc basis	European Maritime Pilots' Association (EMPA) via the Swedish Pilotage Association (Lotsförbundet), SACO
	SBF	Multi-employer bargaining		On a regular/institutionalised basis	ETF, SACO
	Ledarna	Multi-employer bargaining	2500	Information not available	CEC European Managers, ETF
	Sveriges Ingenjörer	Multi-employer bargaining		Information not available	SACO
UK	Nautilus International	Single-employer bargaining	421	On a regular/institutionalised basis	ETF, Trades Union Congress General Federation of Trade Unions Unions
	UNISON	Single-employer bargaining	1800	On a regular/institutionalised basis	
	Unite the Union	Single-employer bargaining		On an ad-hoc basis	
	Rail, Maritime and Transport Union	Information not available		On an ad-hoc basis	ETF, TUC

Source: Panteia, based on national contributions by the Network of Eurofound Correspondents (2016)

*No fact sheet available

Table 42: Domain coverage and membership of employer organisations

	Employer organisation	Domain coverage	Membership				
			Type	Companies	Companies in sector	Employees	Employees in sector
AT	WKÖ-FVALS	O	Compulsory	375	80	600	350
BE	Algemeen Akticomit� der Belgische Binnenvaarts**						
BE	UNIZO (Aequitas)**						
BE	Unie der Continentale Vaart**						
BE	FEB/VBO**						
BE	BVE**						
BE	VBR**						
BE	Ons recht/Notre droit**						
BE	WF-FE**	SO	Voluntary				
CZ	SD �R	O	Voluntary	106	11	90000	

CZ	AVP-CZ*						
DK	DI	O	Voluntary	10000	2	1000000	205
DK	Danske Rederier	SO	Voluntary		1		145
FI	SMLY	O	Voluntary	20	20	500	500
FI	PALTA	O	Voluntary	1725	26	150000	850
FI	AVAINTA	SO	Voluntary	650	15	37000	550
FR	CAF	S	Voluntary	100	50	2500	2008
FR	CNBA	S	Compulsory	642	642	749	749
DE	BDB	C	Voluntary	96	96		
DE	BDS	C	Voluntary	130	130		
DE	VKA	SO	Voluntary	10000		2100000	
HU	Magyar Vasúti-, Vízi- és Légiközlekedési Szövetség	O	Voluntary	34	10	51000	500
IT	ASSTRA	SO	Voluntary	135	5	50000	2319
IT	Confetra	SO	Voluntary				
IT	Conftrasporto	SO	Voluntary				
IT	CNA Fita	SO	Voluntary	24475			
LU	Fedil Barging	S	Voluntary	9	9	1430	1430
NL	CBRB	O	Voluntary	164	121	4000	2000
NL	BLN	O	Voluntary	31	138		2500
PL	ZPAŚ	S	Voluntary	55	55	1750	900
PT	AATFL	C	Voluntary	8	10	850	850
RO	A.A.O.P.F.R. Galati	S	Voluntary	22	20	5000	2000
SE	Sveriges Hamnar	SO	Voluntary	60		4000	600
SE	Arbetsgivarverket	SO		250		250000	987
SE	Almega Tjänsteföretagen	SO	Voluntary	2500		75000	1250
UK	CBOA	O	Voluntary	29	27		500

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*No fact sheet available

**No information received

Table 43: Collective bargaining, consultation and affiliations of employer/business organisations in IWT

	Employer organisation	Collective bargaining	Collective bargaining coverage		Consultation/ frequency	National and European affiliations
			Companies	Employees		
AT	WKÖ-FVALS	Both single- and multi-employer bargaining	80	350	On a regular/ institutionalised basis	EBU, WKÖ
BE	Algemeen Akticomit� der Belgische	Multi-employer bargaining	100	650		EBU

	Binnenvaarts					
	UNIZO (Aequitas)	Multi-employer bargaining	100	650		EBU
	Unie der Continentale Vaart	Multi-employer bargaining	100	650		EBU
	FEB/VBO	Multi-employer bargaining	100	650		
	BVE**					ESO
	VBR**					ESO
	Ons recht/Notre droit**					ESO
	WF-FE**	Multi-employer bargaining	100	650		
CZ	SD ČR	Single-employer bargaining	1	27	On a regular/institutionalised basis	BusinessEurope, Confederation of Industry of the Czech Republic
	AVP-CZ*					
DK	DI	Multi-employer bargaining	2	205	On an ad-hoc basis	BusinessEurope, Confederation of Danish Employers (DA)
	Danske Rederier	Multi-employer bargaining	1	145	On an ad-hoc basis	ECS, Confederation of Danish Employers (DA)
FI	SMLY	Multi-employer bargaining	25	600	On an ad-hoc basis	BusinessEurope, PALTA, EK
	PALTA	Multi-employer bargaining	26	1000	On an ad-hoc basis	BusinessEurope through EK, eEK
	AVAINTA	Multi-employer bargaining	15	550	On an ad-hoc basis	None
FR	CAF	Multi-employer bargaining	1100	3072	On an ad-hoc basis	EBU, Confederation of Small and Medium-sized employers' organisation, representing small and medium-sized enterprises (SMEs)
	CNBA				On a regular/institutionalised basis	ESO
DE	BDB	Multi-employer bargaining	40		On a regular/institutionalised basis	EBU, VBW, DST
	BDS				On a regular/institutionalised	ESO, Federal association of the Self-Employed

	VKA	Multi-employer bargaining			basis	Not in this sector
HU	Magyar Vasúti-, Vízi- és Légiközlekedési Szövetség	Single-employer bargaining	2	416	On a regular/ institutionalised basis	BusinessEurope, Confederation of Hungarian Employers and Industrialists
IT	ASSTRA	Both single- and multi-employer bargaining		1500	Both	CEEP, Confservizi Confindustria - Confederazione Generale dell'Industria Italiana
	Confetra	Multi-employer bargaining			Information not available	CEEL, CLECAT, ECSLA, EFA, FEDEMAC, FEPORT, GETC UNISTOCK
	Conftrasporto	Multi-employer bargaining			Information not available	Confcommercio
	CNA Fita	Multi-employer bargaining			Information not available	UEAPME, CNA
LU	Fedil Barging	Multi-employer bargaining	100	3000	On an ad-hoc basis	EBU, BusinessEurope, Business Luxembourg Federation
NL	CBRB	Multi-employer bargaining	0	0	On an ad-hoc basis	EBU, VNO-NCW
	BLN	Information not available	0	0	On an ad-hoc basis	ESO, MKB-Nederland
PL	ZPAŚ				On an ad-hoc basis	ESO
PT	AATFL	Multi-employer bargaining		8	Information not available	Information not obtained
RO	A.A.O.P.F.R. Galati				On a regular/ institutionalised basis	EBU PDI, CNPR
SE	Sveriges Hamnar	Multi-employer bargaining	60	600	On a regular/ institutionalised basis	ESPO, Confederation of Swedish Enterprise
	Arbetsgivarverket	Single-employer bargaining		987		European Public Administrations Network, European Centre of Employers and Enterprises providing Public services, European Federation of Education Employers, European Rail Infrastructure

						Managers
	Almega Tjänsteföretagen	Multi- employer bargaining		1250	On a regular/ institutionalised basis	Confederation of Swedish Enterprise
UK	CBOA*				On a regular/ institutional basis	ERSTU, National Inland Navigation Forum, Inland Waterways Association

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*No fact sheet available

**No information received

Table 44: The system of sectoral collective bargaining

EU Member State	Collective bargaining coverage (estimates)	Share of multi-employer agreements in total collective bargaining coverage (estimates)	Practice of extending multi-employer agreements to employers who are not affiliated to the signatory employer organisations in the sector
AT	75%	Of all sectoral employees covered by collective agreements (c.70–80%), the vast majority (around 80–90%) are covered by the multi-employer agreement, and the rest (10–20%) by the two single-employer agreements of the Wiener Hafen.	No
BE	100%	Multi-employer bargaining is the main method of bargaining. In 2011, only one company was known for bargaining at the company level, namely the towing company USR. I am not aware of other companies bargaining at this level.	Yes. The joint sector committee deposits its collective agreements for this purpose at the Federal Administration Employment, Work and Social Dialogue (SPF Emploi/FOD Werkgelegenheid). According to the Belgian Collective Bargaining Law of 1968, the agreements are subsequently approved and extended by royal decree.
BG		n/a	The collective decisions of the national sector-related Council for Tripartite Collaboration are taken into account for the Ministry of Transport's legislative provisions and so they are relevant for the whole sector.

HR	0%	No	No
CY		n/a	n/a
CZ	1%	Not relevant. There is no higher-level collective agreement in the sector.	Not relevant. There is no higher-level collective agreement in the sector to be extended.
DK	55%	No	No
EE		According to the available information, there are no collective agreements concluded in the sector.	According to the available information there are no collective agreements concluded in the sector.
FI	70%	We have identified two single-employer agreements and approximately six multi-employer agreements (one of which is divided into three).	Yes
FR	100%	There is no data available. While 100% of the employees within the sector are covered by a sectoral agreement, fewer are covered by a company-level agreement. According to interviews with social partners, coverage by company-level agreements is quite low. Company-level agreements exist in the largest company, CFT, which employs about 650 people. It can be estimated that the coverage rate through single-employer agreements is about 15%. According to the employer organisation CAF, 3% of the companies have concluded a company-level agreement. There is no form of pattern bargaining;	Yes. The practice of extension consists to declare the collective agreement compulsory for all employees and employers included in the scope of a branch, the disposals of a collective agreement negotiated between the representative organisations within the branch. To extend a collective agreement, social partners have to ask the Labour ministry to take a ministerial order. This practice exists in the IWT sector.

		the collective bargaining agreement in the largest company in the sector has an influence on the working conditions of the entire sector.	
DE	80%	Company agreements play a minor role compared to the sectoral agreements concluded by BDB and VKA. The ver.di-BDB agreement serves as pattern.	No
HU	39%	Not relevant as there are no multi-employer agreements or bargaining.	Not relevant since collective bargaining is only conducted at company level.
IE	100%	Waterways Ireland is subject to the public service agreements, which is technically a multi-employer agreement system, since 2010.	
IT	100%	Multi-employer agreements apply to all sector employees . Data about the application of single-employer agreements are not available. However, firm-level agreements are in place at the largest sectoral companies, complementing provisions on terms and conditions of employment and pay entailed by the relevant NCBA.	Yes
LV	0%	Not important	Multi-employer agreements are not concluded in the sector. Were such agreements concluded, their expansion to employers who are not affiliated to the signatory employer organisation would be possible, if the agreement were

			to be qualified as a general (sector-level) agreement, and parties who have signed the agreement meet representativeness requirements prescribed in the Labour law (Section 18, para 3).
LT	17%	There is only one company-level collective agreement in the sector.	No
LU	70%	It is estimated that the only existing sectoral agreement concerning certain aspects of the organisation of working time in inland water transport covers about 70% of the workforce. Company-level agreements exist in the largest companies. According to LCGB, about six companies with an estimated workforce of 600 employees are covered by such agreements (about 20% of the total sectoral workforce).	Yes
NL	100%	Since there is no one large company that influences collective bargaining in other companies, a sectoral agreement is non-existent. Single-company agreements are at present the only concluded agreements at around 10 companies, meaning that 100% of employees covered in the sector fall under single-employer agreements.	No, not at present. The practice of extending collective agreements to a sector was practised until 2014; the 2013 agreement was not extended. In this situation, companies can circumvent the agreement.
PL	0%	n/a	n/a
PT	100%	For a long period, the agreements signed by	In 2010, the branch agreement CCT AATFL-SIMAMEVIP was

		<p>SIMAMEVIP and STFCMM, the branch agreement CCT AATFL-SIMAMEVIP, and the company agreements at Transtejo e Soflusa and Atlantic Ferries were clearly dominant in the sector.</p> <p>However, the growth of the company Douro Azul since 2011 has increased the importance of the agreement signed by this company and the trade union federation FESMAR. Thus, FESMAR has gained a more important role as an actor in collective bargaining.</p>	<p>extended to the rest of the sector (with the exception of those companies who sign their own agreements).</p>
RO	0%	n/a	No
SK	32%	<p>There is only one company collective agreement within sector, which as signed in the largest enterprise.</p>	No
SI		n/a	n/a
ES			<p>Yes. But this does not apply to the IWT sector because there is no multi-employer agreement in force.</p>
SE	70%	100	Yes
UK		<p>Multi-employer bargaining is now extremely rare in the UK, existing only in parts of the construction industry and furniture manufacturing. Most agreements exist at plant/site-level, conducted between management at that level and recognised unions. In large employing organisations</p>	n/a

		operating across multiple sites, there may be single-employer, national-level bargaining. For this sector, this is the case in the public regulatory body, the Environment Agency, and in the Canal & River Trust, which was formerly the public sector body, British Waterways.	
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Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Table 45: Bipartite and tripartite sector-specific boards of public policy

	Name	Bipartite/ tripartite	Origin: agreement/ statutory	Trade unions participating	Employer organisations participating
BE	Promotion of Flemish Inland Water Transport	Tripartite	Statutory	BTB-UBT CSC/ACV-Transcom	UNC/UCV, General Action Committee of the Belgian Inland Navigation Organisations
BG	Sub-sectoral Council for Tripartite Cooperation in Waterborne Transport, Ministry of Transport, Information Technology and Communications (MTITC)	Tripartite	Statutory	FTTUB FTW Podkrepa SSB	Association of Industrial Capital in Bulgaria (BICA) Bulgarian Industrial Association (BIA) Confederation of Employers and Industrialists in Bulgaria (CEIB) Bulgarian Chamber of Commerce and Industry (BCCI) Bulgarian Shipowners' Association (BSA)
DK	Uddannelsesrådet for de maritime uddannelser (Danish Maritime Educational Council)	Tripartite	Statutory	Danish Metalworkers' Union, Dansk Metal 3F Danish Engineers'	Danish Maritime Authority, Søfartsstyrelsen Danish Shipowners' Association, Danmarks

	Skipper training			Association, MMF Danish Maritime Officers SL	Rederiforening Car Ferry Shipowners' Association Bilfærgernes Rederiforening Shipowners' Association for Smaller Vessels
FI	Merimiesasiain neuvottelukunta (Delegation of seafarers' issues)	Tripartite	Statutory	SMU SKL SLPL	SMLY Finnish Shipowners' Association (Suomen Varustamot)
FR	OPCA Transports et Services	Bipartite	By law and agreement	FNPD CGT/SMMP PSCN CFE CGC FEETS-FO FGTE CFDT CFTC UNSA Transport	Armateurs de France UPF UNIM CAF
IT	Osservatorio Nazionale (National Observatory)	Bipartite	Agreement	FILT CGIL FIT CISL UILTRASPORTI UGL Trasporti Faisa Cisa Fast Mobilità Confsal OR.S.A. Ferrovie	AGENS/Federtrasporto ASSTRA ANAV ANEP
LU	Follow-up committee	Bipartite	Agreement (sectoral agreement on working time)	OGBL LCGB	Fedil Barging
PL	Council for the Promotion of Inland Water Transport	(potentially) tripartite	Statutory	None	ZPAŚ
SK	Tripartite body for water	Tripartite	Cooperation agreement	Association of Trade Unions of	Union of Employers of Transport, Posts &

transport issues including representatives of the Ministry, employers and unions		on implementing economic and social partnership	Transport, Post and Telecommunications	Telecommunications of the SR Union of Building Societies of Slovakia
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Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Table 46: ETF membership 2017

EU Member State	Membership
AT	vida
BE	BTB-UBT, CSC/ACV-Transcom
BG	FTTUB, STU
HR	SPH
CY	
CZ	OSD, OSN
DE	ver.di
DK	Serviceforbundet, HK/Privat, SL, 3F
EE	EMSA
FI	SMU, JHL, SKL, SLPL
FR	FEETS-FO, PSCN CFE CGC, UNSA Transport, FGTE CFDT navigation intérieure
GR	
HU	
IE	SIPTU, IMPACT
IT	FILT-CGIL, FIT-CISL, UILTRASPORTI
LT	ŪTAF
LU	OGBL, LCGB
LV	
NL	NINL/Nautilus (FNV), CNV Vakmensen
PL	
PT	Oficiaismar
RO	FNSP
SI	
SK	
ES	FSC-CCOO, ELA – Zerbitzuak, FeSMC-UGT
SE	SEKO, Transport, Unionen, SBF, Ledarna
UK	Nautilus International, Rail Maritime and Transport Union, Unite the Union

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Table 47: Reasons for the fragmentation of trade unions

EU Member State	Trade union	Reasons for fragmentation of trade unions				
		Employees outside the sector	All legal forms/size classes	The whole sector (NACE codes)	All regions of the country	Cover all occupations within the sector among both blue- and white collar workers
AT	vida	Yes	Yes	Yes	Yes	Yes
	GPA-djp	Yes	Yes	No	Yes	No
BE	BTB-UTB'	No	Yes	Yes	Yes	Yes
	CSC/ACV-Transcom	No	Yes	Yes	Yes	No
BG	FTTUB	Yes	Yes	Yes	Yes	Yes
	STU*					
HR	SPH	Yes	Yes	Yes	Yes	Yes
CZ	OSD	Yes	Yes	Yes	Yes	Yes
	OSN	Yes	Yes	No	Yes	Yes
DK	Serviceforbundet	Yes	Yes	Yes	Yes	No
	HK/Privat	Yes	Yes	No	Yes	No
	SL	Yes	Yes	No	Yes	No
	3F	Yes	Yes	No	Yes	No
EE	ESMA*					
FI	SMU	Yes	Yes	Yes	Yes	Yes
	JHL	Yes	Yes	Yes	Yes	No
	SKL	Yes	Yes	Yes	Yes	No
	SLPL	Yes	Yes	Yes	Yes	Yes
	Luotsiliitto	No	Yes	No	Yes	No
FR	FEETS-FO	Yes	Yes	No	Yes	Yes
	FNPD CGT	Yes	Yes	No	Yes	Yes
	PSCN CFE CGC	Yes	Yes	No	Yes	Yes
	UNSA Transports	Yes	Yes	No	Yes	Yes
	FGTE CFDT	Yes	Yes	Yes	Yes	Yes
DE	ver.di	Yes	Yes	Yes	Yes	Yes
HU	KDSZSZ	Yes	Yes	No	Yes	Yes
	VDSZ	Yes	Yes	No	Yes	Yes
IE	SIPTU	Yes	Yes	Yes	Yes	No
	IMPACT	Yes	Just Waterways Ireland	Yes	Yes	No
IT	FILT-CGIL	Yes	Yes	Yes	Yes	Yes
	FIT-CISL	Yes	Yes	Yes	Yes	Yes

	UILTRASPORTI	Yes	Yes	Yes	Yes	Yes
	Faisa Cisol	Yes	Yes	No	Yes	Yes
	UGL FNA	Yes	Yes	No	Yes	Yes
	Federmanager	Yes	Yes	No	Yes	No
LV	ŪTAF	Yes	Yes	No	Yes	Yes
LU	OGBL	Yes	Yes	Yes	Yes	Yes
	LCGB	Yes	Yes	Yes	Yes	Yes
NL	NINL/Nautilus (FNV)	Yes	Yes	Yes	Yes	Yes
	CNV Vakmensen	Yes	Yes	Yes	Yes	Yes
PT	SIMAMEVIP	Yes	Yes	Yes	Yes	Yes
	STFCMM	Yes	Yes	Yes	Yes	Yes
	SITEMAQ	Yes	Yes	Yes	Yes	No
	SEMM	Yes	Yes	Yes	Yes	No
	SINCOMAR	Yes	Yes	Yes	Yes	No
	SMMCMM	Yes	Yes	No	Yes	No
	Oficiaismar	Yes	Yes	Yes	Yes	No
	SITese	Yes	Yes	Yes	Yes	No
RO	FSTC	Yes	Yes	No	No	Yes
	FNSP	Yes	No	Yes	No	Yes
SK	OZPVD	No	Yes	Yes	Yes	Yes
ES	FSC-CCOO	Yes	Yes	Yes	Yes	Yes
	FeSMC-UGT	Yes	Yes	Yes	Yes	Yes
	ELA – Zerbitzuak	Yes	Yes	Yes	No	Yes
	SAME	Yes	Yes	No	No	Yes
SE	SEKO	Yes	Yes	No	Yes	No
	Transport	Yes	Yes	Yes	Yes	No
	Unionen	Yes	No	Yes	Yes	No
	SRAT	Yes	No	No	Yes	Yes
	SBF	Yes	Yes	No	Yes	No
	Ledarna	Yes	Yes	Yes	Yes	No
	Sveriges Ingenjörer	Yes	Yes	Yes	Yes	No
UK	Nautilus International	Yes	Yes	Yes	Yes	Yes
	UNISON	Yes	Yes	No	No	Yes
	Unite the Union	Yes	Yes	Yes	Yes	Yes
	Rail, Maritime and Transport Union	Yes	Yes	Yes	Yes	Yes

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

*No fact sheet available

Table 48: Reasons for the fragmentation of employer organisations

EU Member State	Employer organisations	Reasons for fragmentation of employer organisations			
		The whole sector (NACE codes)	All legal forms/size classes	All regions of the country	Companies/business activities outside the sector
AT	WKÖ-FVALS	Yes	Yes	Yes	Yes: the employer organisation also covers aviation and bus companies.
BE	Algemeen Akticomité der Belgische Binnenvaarts	No	n/a	n/a	n/a
BE	UNIZO (Aequitas)	No	n/a	n/a	n/a
BE	Unie der Continentale Vaart	No	n/a	n/a	n/a
BE	FEB/VBO	No	n/a	n/a	n/a
BE	BVE	No	n/a	n/a	n/a
BE	VBR	No	n/a	n/a	n/a
BE	Ons recht/Notre droit	No	n/a	n/a	n/a
BE	WF-FE	No	n/a	n/a	n/a
CZ	SD ČR	Yes	Yes	Yes	Yes
CZ	AVP-CZ*				
DE	BDB	Yes	Yes	Yes	No
DE	BDS	Yes	Yes	Yes	No
DE	VKA	Yes	No, only public municipalities	Yes	Yes
DK	DI	No	Yes	Yes	Yes: DI is the largest employer organisation in Denmark. DI has manufacturing and industrial companies as members.
DK	Danske Rederier	No	Yes: Danish Shipping/Danske Rederier is the	Yes	Yes

			former Danish Shipowners' Association which, in May 2017, changed its name to Danish Shipping.		
FI	SMLY	Yes	Yes	Yes	Yes
FI	PALTA	Yes	Yes	Yes	Yes: PALTA covers companies in different service sectors: logistics services, communications, cultural and technical services, finance services and other specialist services.
FI	AVAINTA	No	Yes	Yes	Yes
FR	CAF	No	Yes	Yes	No
FR	CNBA	No	No: only companies with up to six employees.	Yes	No
HU	Magyar Vasúti-, Vízi- és Légiközlekedési Szövetség	Yes	Yes	Yes	Yes: rail and air transport
IT	ASSTRA	No	Yes	Yes	Yes: ASSTRA covers local and suburban public transport companies.
IT	Confetra	No	No: Confetra does not cover public companies.	Yes	Yes: Confetra also covers the logistics and the freight transport sectors.
IT	Conftrasporto	No	No: Conftrasporto does not cover public companies.	Yes	Yes, Conftrasporto covers the whole transport sector.
IT	CNA Fita	No	No: CNA Fita only covers small and medium-sized enterprises and artisan companies.	Yes	Yes: CNA Fita covers the whole freight and passenger transport sector.

LU	Fedil Barging	No	Yes	Yes	No
NL	CBRB	Yes	Yes	Yes	Yes: some member companies also engage in activities such as warehousing and logistic services that are incidental to transport over land.
NL	BLN	Yes	Yes	Yes	Yes: BLN also has members who supply goods or services to the sector (e.g. gas, oil, insurance), municipalities, and municipal ports.
PL	ZPAŚ	No	Yes	Yes	No
PT	AATFL	Yes	Yes	Yes	No
RO	A.A.O.P.F.R. Galati	Yes	No: the federation has no 'public property' members.	No: coverage is only for the Danube sector and Constanta (there are non-affiliated potential members in other regions, such as on lakes and inland waterways)	No
SE	Sveriges Hamnar	No	Yes	Yes	Yes: cargo handling services are also covered.
SE	Arbetsgivarverket	No	No: only government employers.	Yes	Yes, Arbetsgivarverket is the government's own employer organisation, involved in all of its collective bargaining.

SE	Almega Tjänsteföretagen	No	Yes	Yes	Yes: the organisation has a wide membership in the service sector.
UK	CBOA	Yes	Yes	Yes	No

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

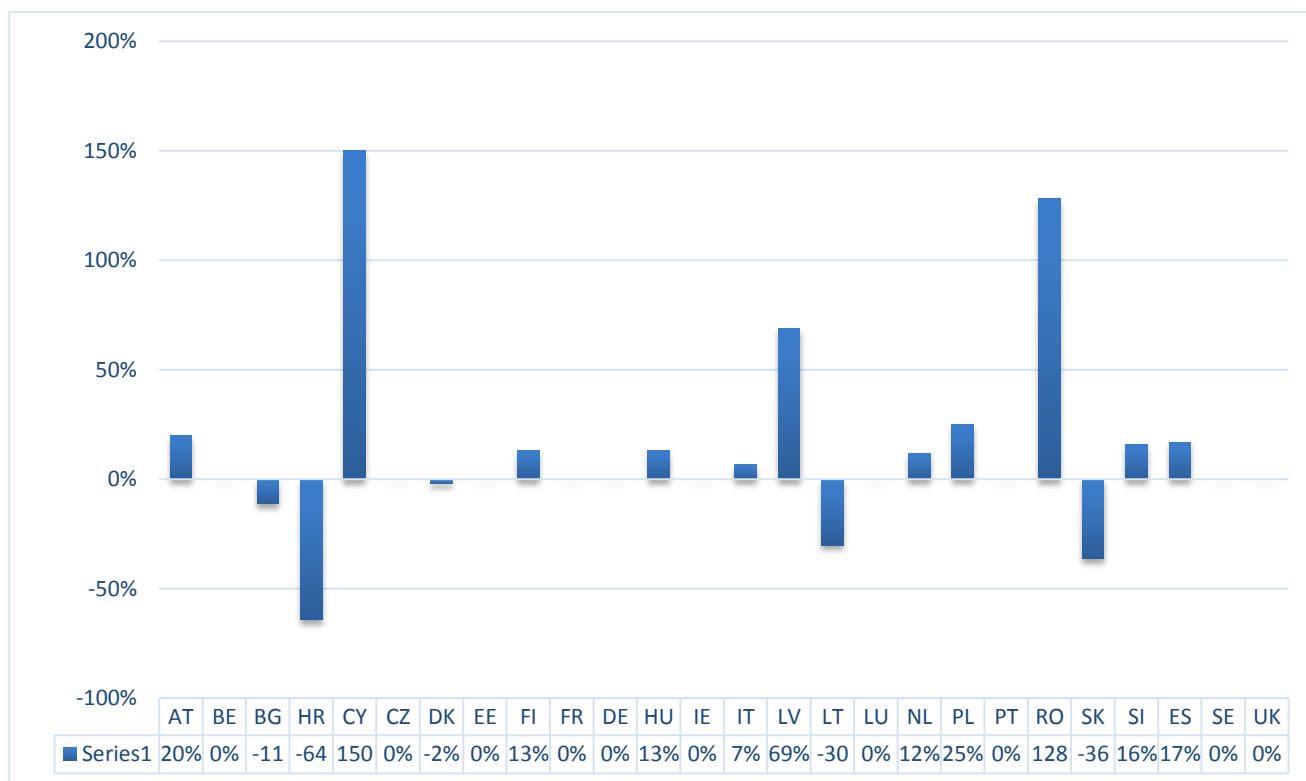
Table 49: Employment characteristics in the IWT sector in the EU28, 2016

EU Member State	Number of companies	Total employment	Average employment per company
AT	114	634	5.6
BE	151	2451	16.2
BG	215	2190	10.2
HR	21	62	2.9
CY	7	1811	258.7
CZ	n/a	2500	n/a
DK	172	884	5.1
EE	4	n/a	n/a
FI	190	1687	8.9
FR	1663	n/a	n/a
DE	869	n/a	n/a
EL*	n/a	n/a	n/a
HU	n/a	1048	n/a
IE	1	285	285.0
IT	1008	2594	2.6
LV	19	179	9.4
LT	32	555	17.3
LU	139	3600	21.6
NL	5260	13485	2.6
MT*	n/a	n/a	n/a
PL	717	3376	4.7
PT	115	3056	26.6
RO	464	6699	14.4
SK	193	900	4.7
SI	58	332	5.7
ES	60	900	15.0
SE	692	n/a	n/a
UK	261	n/a	n/a

Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016).

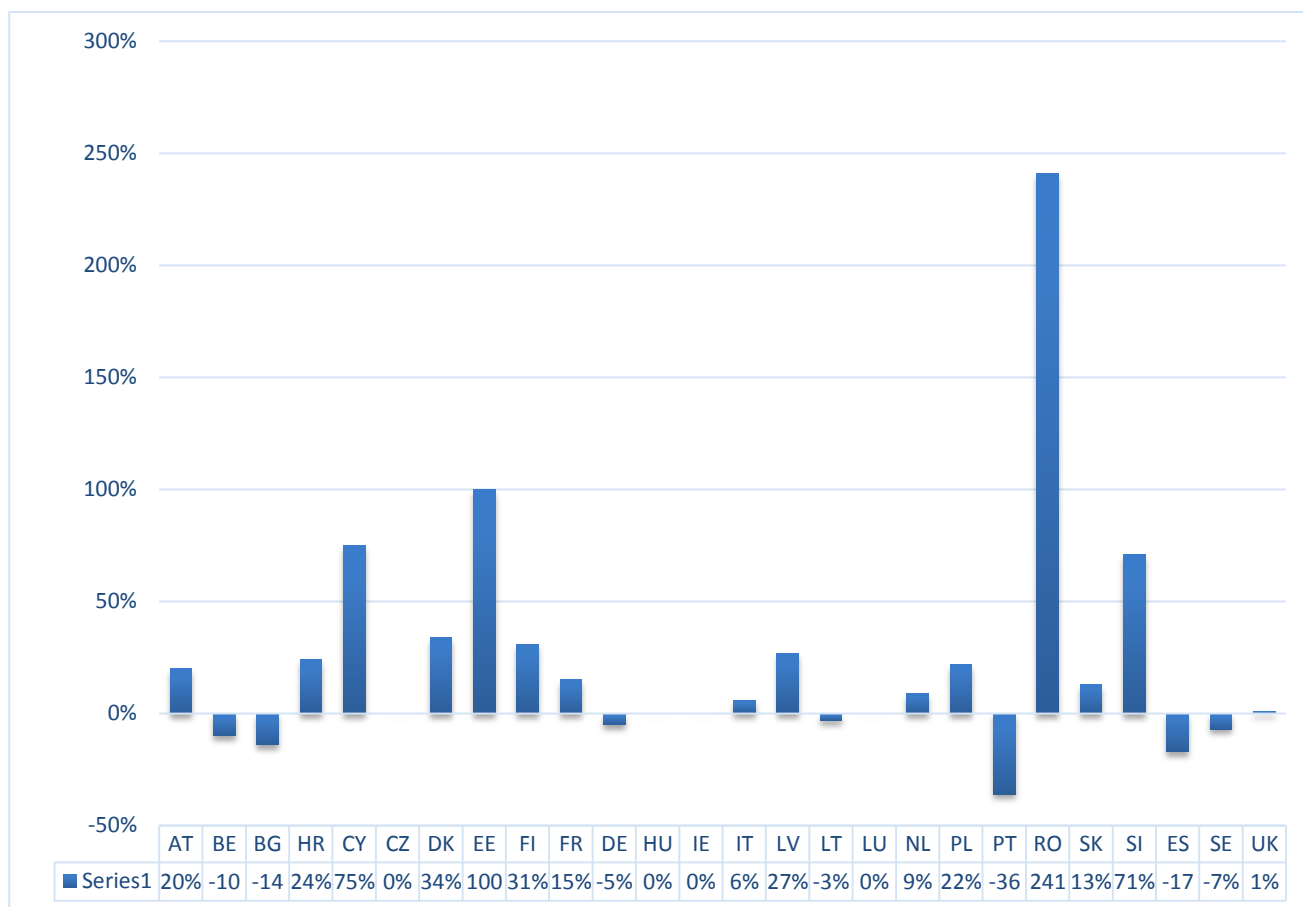
Note: Some figures concern 2015 or 2017 (depending on availability). Due to the small numbers, figures can be defined differently and are unreliable. Employment includes self-employed.

Figure 6: Change in % employment (2011–2016)



Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Figure 7: Change in % of companies (2011–2016)



Source: Panteia, based on national contributions by the Network of Eurofound correspondents (2016)

Annex 2: Network of Eurofound Correspondents

Correspondents who contributed to the study

Country	Name	Organisation
AT	Bernadette Allinger	FORBA
BE	Guy Van Gyes	HIVA – KU Leuven
BG	Gabriela Yordanova	Bulgarian Academy of Sciences
CY	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
CZ	Petr Pojer	Research Institute for Labour and Social Affairs
DE	Sandra Vogel	Cologne Institute for Economic Research
DK	Carsten Jorgensen	FAOS, University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Elena Kousta Penny Georgiadou	Labour Institute of GSEE
ES	Pablo Sanz	Notus
FI	Anna Savolainen	Oxford Research
FR	Frederic Turlan	IR Share
HR	Predrag Bejaković	Institute of Public Finance
HU	Annamaria Kunert	Policy Agenda
IE	Andy Prendergast	IRN Publishing
IT	Anna Arca Sedda	Fondazione Giacomo Brodolini
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Frederic Turlan	IR Share
LV	Kriss Karnitis	EPC Ltd
MT	Luke Fiorini	Centre for Labour Studies, University of Malta
NL	Noelle Payton	University of Amsterdam
PL	Dominik Owczarek	Institute of Public Affairs
PT	Reinhard Naumann	

Representativeness of the European social partner organisations: Inland water transport sector

RO	Nicoleta Stoiciu	European Institute of Romania
SE	Anna Savolainen Anna-Karin Gustafsson	Oxford Research AB
SI	Barbara Luzar	Faculty of Social Sciences, University of Ljubljana
SK	Rastislav Bednarik	Institute for Labour and Family Research
UK	Mark Carley	

This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the inland water transport sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements. The aim of Eurofound's representativeness studies is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identified European Barge Union (EBU) and European Skipper's Organisation (ESO) (representing employers) and European Transport Workers' Federation (ETF) (representing employees) as the most representative European level social partner organisations in the inland water transport sector.

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency whose role is to provide knowledge in the area of social, employment and work-related policies. Eurofound was established in 1975 by Council Regulation (EEC) No. 1365/75 to contribute to the planning and design of better living and working conditions in Europe.

