

'Holy union?' **The sectoral social partners and the Covid-19 crisis in Europe**

Christophe Degryse

Report 2021.04

etui.



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European trade union institute

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Introduction

Nothing can teach the reality of global interdependence better than a pandemic.

Martin Wolf
(FT, 24 March 2021)

The economic and social crisis caused by the Covid-19 pandemic in Europe and around the world is without precedent since World War II if not before. With more than 40 million known cases in Europe in one year, and over 900 000 deaths (March 2020 to March 2021), governments have stepped up their emergency measures to contain the spread of the coronavirus: locking down their populations, closing non-essential businesses, closing offices, factories, schools and places of worship; cancelling cultural events, suspending sports contests and festivals; restricting people's movements, closing or monitoring borders, grounding airlines and more. Since March 2020, measures such as these have brought economic activity to a standstill.

The interdependence of various economic sectors through supply chains, materials and transport for example, together with the fact that the shock hit supply and demand at the same time, mean that the crisis can be described as systemic. No sector has been spared: the entire economic system has taken a hit. The gross domestic product of the European Union shrank by 6.2% in 2020 (6.6% in the euro area),¹ leading to soaring unemployment and temporary unemployment.

The key question this paper attempts to answer is as follows: has European social dialogue played any useful part in this wholly exceptional economic and social situation?² Much research over recent years has attempted to evaluate the usefulness of the discussion and negotiation process between employers' and workers' representatives both within and between sectors. The process is recognised and encouraged in the treaties (TFEU Article 154³), and formalised at European Union level through the establishment of 'social dialogue committees' and in papers on the social partners' representativeness written by Eurofound, the EU Agency with responsibility for researching living and working conditions.⁴

-
1. <https://ec.europa.eu/eurostat/documents/2995521/11562975/2-09032021-AP-EN.pdf/2cf0fd87-a11d-a0eb-ca36-2092f1574f80>
 2. The author thanks Philippe Pochet for his comments on a previous version of this text, and Bianca Luna Fabris for her valuable assistance. All responsibility for the content of this paper lies with the author.
 3. This article of the Treaty provides for compulsory consultation of management and labour by the European Commission in all matters concerning employment and social affairs. During such consultations, the social partners may decide to hold bilateral consultations with a view to reaching an agreement on the matter at hand. Such an agreement may then be made the subject of a directive by the Council acting on a proposal from the Commission, or may be implemented by the national social partners in line with their own practices.
 4. <https://www.eurofound.europa.eu>

Moving beyond formal recognition, observers have expressed some scepticism as to the usefulness in practice of the social dialogue process given structural weaknesses in the implementation of the texts adopted (Keller and Weber 2011; Marginson 2005), in view of the various stakeholder profiles (Léonard *et al.* 2011), their organisational and individual capacities (Bechter *et al.* 2021), because of the outcomes achieved – some of them deemed poor, especially since 2000 (Degryse 2019) – or as a result of political interference that weakened the process (Tricart 2019).

The economic and social shock caused by the pandemic can therefore be viewed as an opportunity to examine the specific role of social dialogue in the very real ‘trial by fire’ that we have all undergone. Did the joint negotiations in 2020 on Covid-19 lend us greater resilience to cope more effectively with the ordeal?

The social partners are not, of course, lone stakeholders in the political landscape: the European institutions have played a key role in managing the systemic shock. They urgently adopted a series of measures related to public health (vaccination strategy, supply of medical equipment, protective equipment, etc.) and support for the economy, businesses and employment. For example, the European Union adopted a number of financial instruments and programmes to support the economy, such as Next Generation (EUR 750 billion), the SURE programme (EUR 100 billion), the European Stability Mechanism (EUR 540 billion) and the Pandemic Emergency Purchase Programme (PEPP) (EUR 1 850 billion), not including action taken by the European Investment Bank (EIB) and the redirection of some structural funds. Europe also temporarily suspended the Stability and Growth Pact and rules prohibiting state aid. All these measures helped to mitigate, to the extent possible, the impact on economic activity and on certain sectors in particular.

But what did the sectoral social partners contribute to the management of the crisis? In order to attempt to respond to this question, the ETUI keeps a regularly updated database of joint social dialogue documents. At January 2021, it contained some 1 016 joint texts that were the outcomes of social dialogue negotiations in 43 sectors of economic activity since 1978.⁵ Some of its input is informed by the European Commission database,⁶ and some of it by ETUI researchers.⁷

The database is a useful tool that makes it possible to analyse the sectoral social partners’ ‘output’. It enables comparisons to be drawn between sectors, their levels of activity, the topics addressed, and even the approach to social dialogue developed

5. Excluding cross-industry social dialogue, which is not discussed as part of this report.

6. <https://ec.europa.eu/social/main.jsp?catId=521&langId=en>

7. As discussed in a previous Working Paper (Degryse 2015), the two databases are similar but differ in the classification criteria used and the selection of texts they contain. As part of the present paper, it should be noted that the Commission accepts only texts signed within the formal setting of the sectoral social dialogue committees (SSDC) that it recognises; whereas the ETUI includes joint texts signed outside that setting. During the Covid-19 crisis, some sectors that were not formally established as SSDCs were nevertheless very active in Europe, for example the social services and travel agency sectors.

by the social partners (whether it is merely an arena for the discussion and pooling of best practice, or a forum for reciprocal undertakings on specific issues, or a vehicle for joint lobbying of the European institutions). Nonetheless, a tool of this kind is, of course, limited: it does not always make for an understanding of the stakeholders' underlying strategies or their internal dynamics. If the database were to help achieve that goal, it would need to be supplemented with qualitative interviews involving trade union and employer stakeholders on matters such as how sectoral priorities were discussed and drawn up, the obstacles encountered, the verdicts of the trade union and employer stakeholders on the outcomes, etc. No database can contain answers to those questions. Given the high number of sectors discussed in this paper (30 sectors and 51 joint texts directly linked to Covid-19; see the section headed 'Quantitative analysis'), it was not possible to conduct as many interviews as there were sectors. However, we collected a scattering of points of view from certain members of European trade union federations that facilitated a better understanding of stakeholder dynamics.⁸

In the following pages, we shall begin by laying out our general analytical framework for sectoral social dialogue and methodology. We shall then tackle the quantitative side, namely the various quantitative aspects of producing joint sectoral texts on Covid-19 in 2020.

Finally, in a rather more qualitative analysis, we shall analyse the sectors and joint texts one by one with a view to answering the following questions: what were the major challenges that the various sectors had to address in the pandemic in 2020; what is the nature of the texts that the social partners in the sector adopted in that regard; and what were their priorities. For each sector, the texts adopted are set out in the form of a table, and their priorities are listed in three columns. The table-based means of grouping priorities in this way was a decision made by the author in an attempt to provide the reader with the most meaningful overview possible for each sector while making for easy comparison with others. This underpinned the next process, namely the compilation of a table that summarises the 30 sectors and the 11-strong set of measures that were most frequently cited in the social dialogue 'Covid' texts.

The 30 sectors covered are those where the European social partners expressly addressed the Covid-19 crisis and negotiated common positions to tackle it. They are presented in chronological order (date of signature), which to some extent indicates the level of urgency that the social partners felt at the time. We note that the paper concerns only 2020 'Covid' texts. As we will see in the quantitative section, the bulk of these documents were adopted in spring 2020, i.e. the first lockdown. This does not mean that the sectoral social partners did not address the crisis in 2021: at the time of writing (end-March 2021), sectors such as maritime fisheries and civil aviation have adopted new joint texts on this matter that are not covered in this paper.

8. We extend our thanks to the following for their sectoral contributions: Rolf Gehrig (Construction, Woodworking, Furniture), Steven Valmik (Banking and Insurance), Estelle Brentnall and Eline Neerinckx (Inland Waterways, Maritime Fisheries, Ports, Road Transport and Civil Aviation).

Can the European social dialogue forums be regarded as joint forums for managing socio-economic challenges as serious as those encountered since March 2020? Apart from its immediate relevance to the concept of the social market economy advocated by the EU,⁹ this question is also pertinent to the other challenges faced by the European economy, in particular climate transition. To what extent can the concept of social democracy be embodied in social dialogue, and, in particular, to what extent can it support the implementation of a zero-carbon economy by 2050? The Covid-19 crisis and the ways in which the social partners are, or are not, involved in its management can act as a real-life test for social democracy, which has itself been described as ‘the art of the compromise’.¹⁰

9. We note, by contrast, that social dialogue and collective bargaining were reduced to their simplest terms during the financial crisis and the euro crisis in 2008-2012.

10. See Noblecourt (2020).

1. General framework and methodology

The European sectoral social dialogue database managed by the ETUI contains some 1 016 joint texts for the period 1978 to 2020. They are documents that were adopted jointly by employers' and workers' representative organisations at European level in the sectors concerned. Currently, there are 43 sectors with formally established 'sectoral social dialogue committees' (SSDCs), some of which have very close ties to EU policies (e.g. agriculture, transport), and some of which are apparently fairly removed from them (e.g. horeca [hospitality] or hairdressing). But, regardless of their proximity to European policy, the social partners in each of these sectors have all been concerned to meet, hold discussions and establish a form of dialogue at European level.

In addition to exchanging information, pooling experience and making national comparisons, one of the major outcomes of social dialogue is the adoption of joint texts. The texts may vary in nature and objectives, and deal with different topics. They may be addressed to a variety of recipients, for example businesses in the sector, national governments, the European Commission, or members of European organisations and federations.

Together with the types of texts adopted, this diversity reflects the extensive range of sectors in terms of the sizes of businesses they represent, the volume of employment, the degree of Europeanisation and stakeholder dynamics. In order to attempt to analyse the situation, it is therefore necessary to construct analytical frameworks. The first such framework concerns the texts adopted. We have classified the texts in six categories depending on their addressees and their function (see Table 1).

It is clear from this table that European sectoral social dialogue is used by the social partners chiefly in an attempt to influence European policy and legislative processes. Over half the texts adopted are 'common positions' addressed to the EU institutions and/or the governments of the Member States and aim to achieve a policy change. This is what we mean by 'joint lobbying'.

Table 1 Nature of the sectoral social partners' 'output'

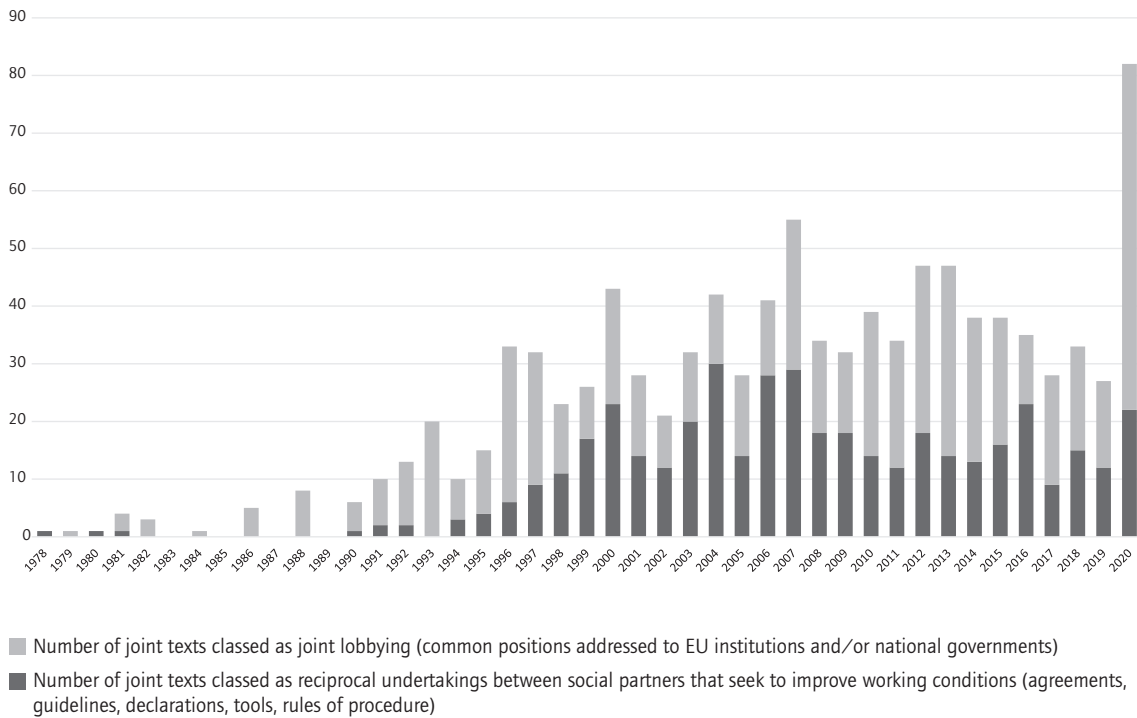
ETUI categories	Definition	Function	Number (and %)
'Common positions'	Texts addressed by the social partners to the EU institutions or to the governments of the Member States.	'Joint lobbying' To influence general policy direction or a piece of draft legislation. For example: <i>Joint Contribution of European Social Dialog in the Postal Sector – Consultation on the Postal Services Directive</i>	585 (57.6%)
'Declarations'	Texts to raise awareness of the social partners' intent in respect of a particular issue; they are not binding in nature and have no provision for monitoring their implementation ('declarations of intent').	'Reciprocal undertakings' To set out the social partners' intentions/undertakings on certain specific matters. For example: <i>Joint Declaration on Artificial Intelligence by the Telecoms social partners</i>	192 (18.9%)
'Tools'	Texts setting out guidance to pursue certain objectives (equality, non-discrimination, accident prevention, etc.).	'Reciprocal undertakings' To help national affiliates to implement certain measures. For example: <i>Joint Practical Guidelines on how to promote effective integration of migrant and refugee learners in the education and socio-economic environment</i>	97 (9.5%)
'Guidelines'	Texts in which the social partners undertake to achieve specific objectives and establish a monitoring procedure to evaluate the outcomes; they are not legally binding.	'Reciprocal undertakings' To lay down the objectives to be achieved by the social partners and their affiliates. For example: <i>Guidelines to drawing up gender equality action plans in local and regional government</i>	74 (7.2%)
'Agreements'	Joint texts to be made the subject of directives or implemented by the national social partners and the Member States in line with their own practices, within the meaning of Article 155 of the Treaty on the Functioning of the European Union (they are legally binding).	'Reciprocal undertakings' Co-legislating with the EU institutions on a sectoral matter. For example: <i>European agreement concerning certain aspects of the organisation of working time in inland waterway transport</i>	17 (1.7%)
'Rules of procedure'	Texts defining the rules governing social dialogue in the sector concerned.	'Reciprocal undertakings' To set out the rules of social dialogue.	51 (5%)

Source: ETUI, devised by the author

The second function of social dialogue is to commit the social partners, in binding or non-binding fashion depending on the nature of the texts involved, to improve working conditions in the sector at issue. This function operates through texts ranging from simple 'declarations' devoid of any legally binding effect, via 'guidelines' and 'tools' to 'agreements' that can be made the subject of directives. It is immediately clear that the enforceability and level of monitoring of these texts is inversely proportional to the number of texts: the greater the enforceability, e.g. agreements, the fewer the number. However, this should not lead to a hasty impression that the quality of sectoral social dialogue should be assessed solely on the basis of the enforceability of the adopted texts.

Armed with this analytical distinction, we can study how sectoral social dialogue (SSD) has developed by noting the proportion of joint lobbying texts to the proportion of reciprocal undertakings (all levels of enforceability included). The chart below shows how these functions have developed: the light grey shows the number of joint lobbying texts; the dark grey the number of reciprocal undertakings (see Figure 1).

Figure 1 Changes in SSD function based on the nature of adopted texts

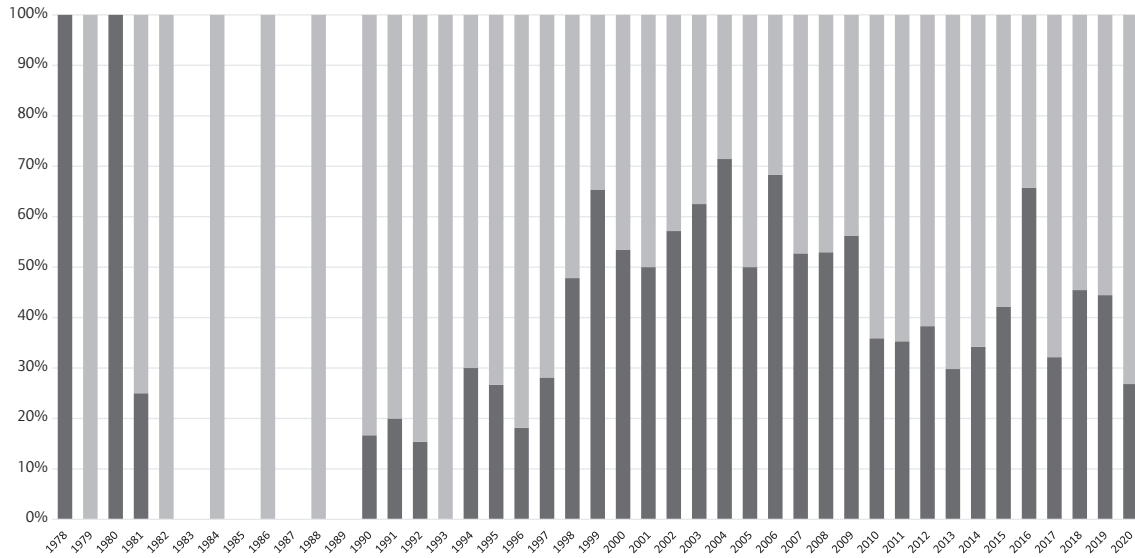


Source: ETUI database

This chart shows that the 'reciprocal undertakings' function rose proportionally throughout the 1990s until 2005-2007, and that the pattern then went into reverse; this is presented in clearer fashion in the chart below, which expresses the same data in percentage form (see Figure 2).

As far as we are concerned in this paper, the chart also shows that, in absolute figures, the year 2020 is far and away the year of the greatest activity between the sectoral social partners. We shall develop this quantitative analysis in the next section.

Figure 2 Changes in SSD function based on the nature of adopted texts, as a percentage



Source: ETUI database

Again on methodological matters, we drew up a topic-based classification for each adopted text based on the area addressed in the text. Each text is placed in one of the 13 categories set out below:

1. **Social aspects of Community policies** (e.g. Joint Resolution on the need of a strong social dimension in the Common Fisheries Policy);
2. **Working conditions** (e.g. EFCI and UNI Europa joint Statement for the European Campaign for Declared Work 2020 – #EU4FairWork, in industrial cleaning);
3. **Sustainable development** (e.g. The circular bioeconomy: an opportunity for Europe’s growth and jobs, in the paper sector);
4. **Social dialogue** (e.g. For a New Decade of Ambitious and Cooperative EU Sectoral Social Dialogue in Road Transport);
5. **Enlargement** (e.g. Strengthening social dialogue and reinforcing capacities of national social partner organizations in the new member states in the performing arts sector);
6. **Employment** (e.g. Joint Declaration on Demographic change in the European Postal Sector);
7. **Training** (e.g. Joint Response to Consultation on Update of the Skills Agenda for Europe, in private security);
8. **Non-discrimination** (e.g. Joint ETUCE/EFEE Statement on Multiculturalism, Democratic Citizenship and Social Inclusion in Education);
9. **Economic and/or sectoral policies** (e.g. A long-term and ambitious EU Raw Materials Strategy, in the mining sector);
10. **Corporate social responsibility** (e.g. Agreement on Corporate Social Responsibility (CSR) in the Contract Catering Sector);

11. **Restructuring** (e.g. policy guidelines, human resources development strategies, better anticipation and management of change in the central government sector);
12. **Health and Safety** (e.g. HOSPEEM-EPSU position in view of the European Commission study supporting the assessment of different options concerning the protection of workers from exposure to hazardous medicinal products, in the hospitals sector);
13. **Working time** (e.g. European agreement concerning certain aspects of the organisation of working time in inland waterway transport).

Of course, any one text may address more than one topic, and therefore the database allows multiple classifications (topic 1, topic 2).

In closing this section on methodology, we note that, in order to be able to contextualise the texts, in other words to place them in the context of a particular matter of interest, we have added a list of tags that make it possible, where relevant, to link the texts to news events or specific issues. In 2020, we added the tag 'Covid-19'. This system of classification cross-referencing by types of text, topics and tags, enables us to identify, with some degree of accuracy, the role that the sectoral social partners set out to play at European level. That is the foundation that will underpin our analysis in the following chapters.

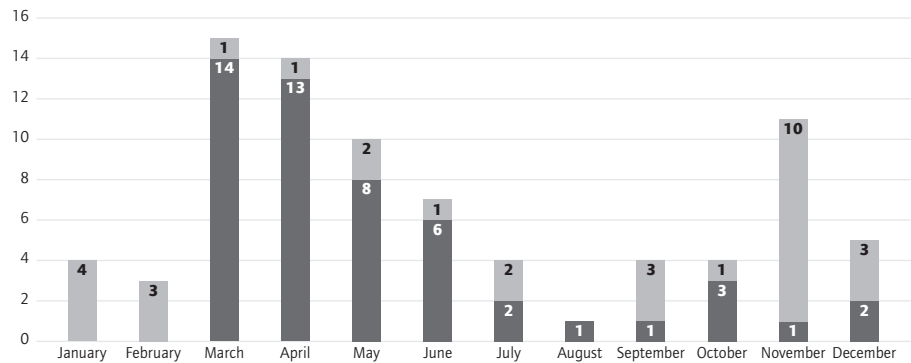
2. The sectoral social partners' role in the Covid-19 crisis

2.1 Quantitative section

Number of texts

In order to analyse the European sectoral social partners' reaction to the Covid-19 crisis, we shall examine the joint texts where the core content is linked to the pandemic.¹¹ Of the 82 texts adopted in 2020, around 51 (or about 62% of the total) directly concern the pandemic, its consequences on the sector and the consequences of the preventive measures taken in the Member States. As Figure 3 shows, the majority of the texts were adopted at the height of the first wave of the pandemic, i.e. between March and June 2020.

Figure 3 Total number of joint texts adopted by the sectoral social partners in 2020



Dark grey: texts concerning the Covid-19 crisis

Source: ETUI database

11. We have excluded texts that refer to Covid-19 but do not have it as their core object. For example, the telecommunications social partners' text on harassment of their employees over 5G (the novel claim that 5G was responsible for the pandemic) (text of 19 May 2020); or the civil aviation social partners text on unruly passengers whose behaviour may be exacerbated by anti-Covid-19 measures (text of 30 November 2020). Covid-19 and the management of the ensuing crisis are not the core object of these texts, and therefore they were not selected for analysis here.

This chart shows that the sectoral social partners wasted no time in addressing the crisis in their negotiating forums. More than half the texts on Covid-19 were adopted in the first two months of the pandemic spreading to Europe.

From June 2020, the first measures to ease lockdowns were taken by the governments of the EU Member States. The summer holidays followed, when shops, hotels, cafes and restaurants were able to reopen their doors. Tourism resumed very gradually, offices began to fill again, and factories gradually resumed production. In July 2020, the European Council adopted the series of measures proposed by the Commission, in particular the EUR 750 billion Next Generation EU economic recovery fund.¹²

Number of sectors

Another feature of this period of intense social dialogue activity was the large number of sectors involved. No fewer than 30 different sectors (out of a total of 43 formally established as SSDCs) adopted one or more joint texts on Covid-19 (see Table 2). All types of economic activities were involved: transport (all forms), fisheries, culture (live performance, audiovisual), horeca, agriculture, metal industry, education, chemical industry, etc. Almost all primary, secondary and tertiary service activities were involved.

Part of the explanation for this high number of sectors could lie in the fact that the public authorities' management of the pandemic was chiefly on a sector-by-sector basis. The authorities' decisions on preventive health measures throughout 2020 (and 2021) effectively opened and closed entire sectors: horeca, schools, commerce, administrations, culture, travel, etc. We could say, therefore, that some sectors, through no fault of their own, became the main adjustment variables in the health crisis. This undoubtedly explains why there was so much activity in sectoral social dialogue.

12. <https://www.consilium.europa.eu/en/press/press-releases/2020/07/21/european-council-conclusions-17-21-july-2020/>

Table 2 Number of joint texts on Covid-19 adopted by sector

Sectors	Number of 'Covid' texts (2020)	Sectors	Number of 'Covid' texts (2020)
Maritime transport	4	Audiovisual	1
Social services*	4	Transport (all forms), logistics*, ports	1
Civil aviation	4	Travel agencies	1
Sea fisheries	3	Agriculture	1
Horeca/tourism	3	Telecommunications	1
Temporary agency work	2	Ports	1
Live performance	2	Road transport	1
Construction	2	Education	1
Food and drink industry	2	Banking and insurance	1
Football	2	Chemical industry	1
Commerce	2	Woodworking, furniture	1
Private security	2	Local and regional government	1
Metal industry	2	Sugar	1
Textile and clothing, tanning and leather, footwear	1	Central government	1
Graphical industry	1	Cleaning	1
Overall total			51

* The social services, personal and household services, tour operators, travel agencies and logistics sectors do not have formally established sectoral social dialogue committees.

Source: ETUI database

Missing sectors

The sectors absent from the list include the postal services: the social partners did not adopt documents at European level; instead, there was a joint declaration at international level on 27 March 2020 on protecting postal workers worldwide.¹³ A few major industries are also absent from the list (mining, shipbuilding, electricity, paper). This obviously does not mean that those sectors escaped the crisis,¹⁴ rather that they did not choose to use the European social dialogue forums to that end. More surprisingly, three sectors that have been severely impacted by the pandemic and the containment measures implemented in the Member States are absent from

13. In a joint statement, UNI Global Union and the Universal Postal Union – the UN agency for the postal sector – are urging postal operators and postal unions to put key measures in place to protect the health and safety of postal workers around the world as they continue to serve during the coronavirus health pandemic, 27 March 2020.
14. For example, see: 'Covid-19: Les contrats de construction navale également affectés' (<https://www.journalmarinemarchande.eu/actualite/shipping/Covid-19-les-contrats-de-construction-navale-egalement-affectes>); 'La crise du Covid-19 dans les secteurs de l'énergie et de l'environnement' (<https://www.sia-partners.com/fr/actualites-et-publications/de-nos-experts/la-crise-du-Covid-19-dans-les-secteurs-de-lenergie-et-de>); or the effect of the Covid-19 crisis on the paper sector (<https://www.coface.fr/Etudes-economiques-et-risque-pays/Papier>).

the list: hospitals, personal services (hairdressers) and institutional food services. These three sectors are worthy of specific research as part of a further project.

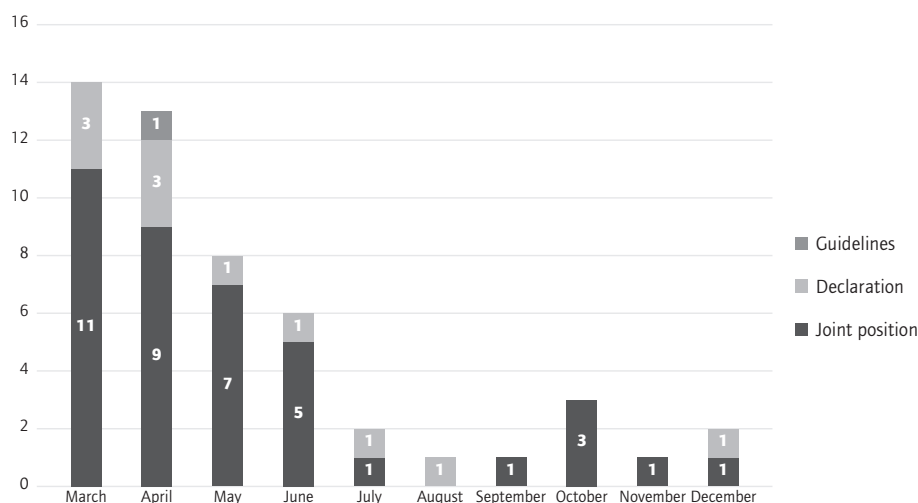
Types of text adopted

It is no surprise that the 51 joint texts on Covid-19 are primarily ‘common positions’ addressed by the social partners to European institutions or national governments (39 common positions, or 76.5%). As we shall see in the qualitative part of this paper, they chiefly involve the social partners calling on the authorities to provide assistance to businesses and workers in their particular sector.

Among the other types of text, there are 11 ‘declarations’ (21.5%) addressed to members of federations or directly to businesses, calling on them to ‘act responsibly’ (horeca) and ‘strictly respect health and safety measures’ (ports), and proposing measures to protect workers’ health (woodworking), etc.

Finally, there is one set of ‘guidelines’ in the food and drink industry setting out the principles that each business should follow in respect of health and safety, ways of working, management of employee sickness, etc. The guidelines include procedures for monitoring and assessing the implementation of the principles.

Figure 4 Classification of 51 ‘Covid’ texts by type and month of adoption

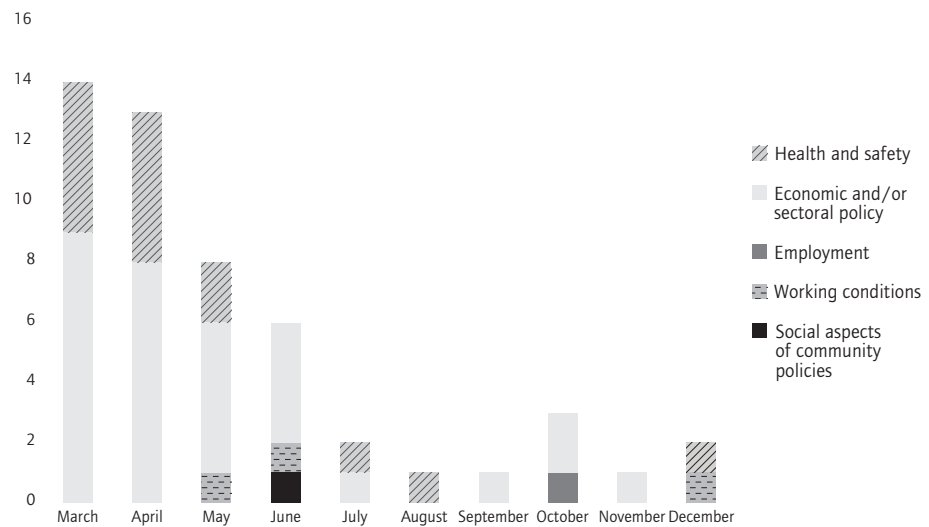


Source: ETUI database

Topics addressed

In terms of the topics most addressed in the texts, it is also no surprise that 'economic and sectoral policies' (such as sectoral containment measures) ranked top among the social partners' concerns in 2020 (31 of the 51 texts, or 61%), followed by issues involving workers' 'health and safety' (15 texts, or 29.4%). Next are three texts on 'working conditions', one on 'employment' and one on 'social aspects of Community policies'.

Figure 5 Topic-based classification of the 51 Covid-19 texts



Source: ETUI database

To conclude this quantitative section, there is merit in comparing the sectoral social partners' reaction to the Covid-19 crisis to their reaction to the financial crisis of 2008 (and its various extensions). In a previous Working Paper (Degryse 2015), we noted that the financial crisis had had a relatively limited dampening effect on sectoral social dialogue activity. We also noted that 'the specific topic of the debt crisis (...) and its consequences is indeed present in the social dialogue, but to a somewhat limited extent (except in the regional and local government sector and, to a lesser extent, the central government sector). In sectors such as banking or insurance, this topic is even totally absent over the period examined' (p. 44). In the Covid-19 crisis, the impact on activity in sectoral social dialogue has not only been extremely high, but is expressly identified in very many sectors. There are therefore two major differences between the two crises.

2.2 Qualitative section

In this section, we will give a brief overview of the main challenges arising during the initial phases of the pandemic in respect of each sector. We shall then study the main points addressed by the social partners for that sector in their joint texts. We subsequently provide a table summarising the texts in the sector, including the key priorities raised, which we have grouped into three columns.

The data reframing the general background and the impact of Covid-19 on each sector have been taken from various sources. We used studies and statistics published by Eurostat¹⁵ as well as a number of sectoral papers (retail trade, industrial production, construction, services).¹⁶ The European Parliament has published studies on a number of sectors that have been particularly affected (culture,¹⁷ aviation,¹⁸ transport and tourism¹⁹). At international level, the ILO has published studies on the sectoral impact of Covid²⁰ on the food and drink industry, construction, care services, passenger transport, media and culture, the forest sector, the public service, road transport, emergency services, the automotive industry, food retail, the textiles, clothing, leather and footwear industries, civil aviation, health, education, maritime transport, tourism and agriculture. The OECD has published many reports on the public policies implemented in industrialised countries and on the impact of the crisis on central and regional government administrations,²¹ education²² and the retail sector.²³

The various sectors are tackled in chronological order of their adoption of joint texts, which may indicate the urgency felt by the social partners and the speed of their reaction.

At the end of the section, we set out several tables summarising the measures that were most called for by the social partners in 11 categories (ranging from, for example, support for business cashflow to harmonised health protocols and access to temporary unemployment schemes for workers, etc.). We use the table to draw conclusions on the role played by the social partners during the pandemic in 2020.

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15. <https://ec.europa.eu/eurostat/fr/web/Covid-19/overview>
 16. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Impact_of_Covid-19_crisis_on_short-term_statistics
 17. [https://www.europarl.europa.eu/RegData/etudes/STUD/2021/652250/IPOL_STU\(2021\)652250_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2021/652250/IPOL_STU(2021)652250_EN.pdf)
 18. [http://www.europarl.europa.eu/RegData/etudes/BRIE/2021/689346/EPRS_BRI\(2021\)689346_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/BRIE/2021/689346/EPRS_BRI(2021)689346_EN.pdf)
 19. [http://www.europarl.europa.eu/RegData/etudes/STUD/2021/652235/IPOL_STU\(2021\)652235_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2021/652235/IPOL_STU(2021)652235_EN.pdf)
 20. <https://www.ilo.org/global/topics/coronavirus/sectoral/lang--en/index.htm>
 21. <http://www.oecd.org/coronavirus/policy-responses/l-impact-territorial-du-Covid-19-generer-la-crise-entre-niveaux-de-gouvernement-2596466b>
 22. <http://www.oecd.org/coronavirus/policy-responses/education-et-Covid-19-les-repercussions-a-long-terme-de-la-fermeture-des-ecoles-7ab43642>
 23. <http://www.oecd.org/coronavirus/policy-responses/le-Covid-19-et-le-secteur-du-commerce-de-detail-impact-et-mesures-de-politique-publique-affc2e6b>

Covid-19 in cross-sectoral social dialogue

At cross-sectoral level, on 16 March 2020, the social partners (ETUC, BusinessEurope, CEEP, SMEUnited) made a joint statement on the emergency caused by the pandemic. The short text stated its support for the measures announced by the European Commission and the European Central Bank to counter the economic impact of the coronavirus, and urged the Member States to approve and swiftly implement the measures and to involve the social partners at national level.*

* <https://www.etuc.org/fr/node/18798>

Horeca/tourism

At European level, the 'horeca' sector – an acronym for 'hotels, restaurants and cafés' – represents some 2 million businesses (of which 90% are micro-businesses). It was, of course, not only among the first sectors affected by the measures taken by public authorities to combat the pandemic, namely lockdown, curfews and shutdowns, but also one of those affected most directly. Since March, the turnover of businesses in the sector has been falling. During partial easing of lockdowns when businesses reopened subject to conditions, consumer nervousness and travel restrictions and the absence of consumer trust continued to have an impact on businesses. Although the pandemic has affected all EU countries, those most reliant on tourism have suffered the greatest impact: 'Economies which heavily rely on tourism such as Spain, Greece and Malta witnessed drops of more than 90%. While travel slightly resumed over the course of July and August, occupancy rates were still respectively 50% and 32% lower in July and August 2020 compared to the same periods in 2019.'²⁴

The European social partner in this sector on the employers' side is HOTREC (the umbrella Association of Hotels, Restaurants, Bars and Cafés and similar establishments in Europe), representing 44 national associations in 33 European countries. For the workers, the social partner is the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT) which represents 120 national trade unions from 35 European countries.

As early as 11 March 2020, HOTREC and EFFAT adopted a short initial joint text addressed chiefly to hotels, restaurants and cafés as well as national governments. They recommended that horeca members should be scrupulous in implementing the hygiene practices and other preventive measures recommended by the World Health Organization (on the same date, the WHO classified the Covid-19 outbreak as a pandemic). Protecting the health and safety of workers and customers would appear to be the only way of being able to pursue business in the sector. They called on national governments to introduce support measures such as tax reliefs, liquidity loans and temporary short-time work, and urged the European

²⁴ Figures from the Joint HOTREC and EFFAT Statement on Rebuilding the Hospitality Sector, Brussels, 27 November 2020.

authorities to relax competition policy (authorise state aid). The declaration was made a few days before lockdown measures became widespread (in Italy, Spain, France, Belgium and elsewhere).

Table 3 Horeca/tourism – three joint ‘Covid’ texts in 2020

Date text adopted	Title	Priority 1	Priority 2	Priority 3
11/03/2020	<i>Social partners of the European Horeca sector recommend companies and employees to act responsibly, and call upon public authorities for support measures during and after the Covid-19 outbreak</i>	Health recommendations for businesses in the sector for employees and customers.	Call on national governments to provide support measures for the sector (taxation, loans, short-term work).	Call on the EU to facilitate deployment of state aid at national level.
17/03/2020	<i>European tourism sector demands urgent supportive measures to reduce devastating impact of Covid-19 (non-SSDC)</i>	Immediate implementation of measures outlined by the European Council on 13 March* to mitigate the pandemic's socio-economic impact.	Calls on national governments to provide support (state aid, tax reliefs, loans, short-term work, deferment of social security contributions and tax payments).	Ensure a full-speed recovery after the crisis by simplifying visa rules, reducing or waiving travellers' taxes, supporting destinations (promotion, marketing, product development, etc.).
27/11/2020	<i>Joint HOTREC and EFFAT Statement on Rebuilding the Hospitality Sector</i>	<ul style="list-style-type: none"> – swiftly adopt and deploy the EU Recovery Plan; – place hospitality/tourism at the heart of National Recovery and Resilience Plans (NRRPs), involving the social partners; – extend short-time work schemes at least until September 2021; – ensure fair allowances, including for seasonal and temporary workers. 	Short-term measures to: <ul style="list-style-type: none"> – save jobs and support income; – support businesses in the sector and stimulate demand; – restore consumer confidence through health and safety protocols for hospitality venues; – harmonise and relax travel restrictions. 	Long-term measures to rebuild the hospitality sector: <ul style="list-style-type: none"> – national recovery plans; – vocational education and training; – digitalisation and sustainability.

* https://ec.europa.eu/commission/presscorner/detail/en/ip_20_459: The Commission presents an immediate response to mitigate the socio-economic impact of the Covid-19 outbreak, centred on a European coordinated response: State Aid Framework Flexibility, European Fiscal Framework Flexibility, Ensuring solidarity in the Single Market to ensure adequate supply of protective equipment and medicines, Mobilising the EU budget to bring immediate relief to hard-hit SMEs, Alleviating the impact on employment, Coronavirus Response Investment Initiative (EUR 37 billion under cohesion policy), Mobilising the European Globalisation Adjustment Fund, the EU Solidarity Fund, the EIB (source: Timeline Covid, ETUI).

On 17 March, an ad hoc alliance of 56 organisations, associations, employers' federations and trade unions in the tourism sector was formed,²⁵ including horeca and tourist agencies as well as airlines, cruise companies, festival organisers, youth hostels, associations for spas, etc. On the trade union side, EFFAT was joined by UNI Europa, which represents workers in service industries. Together, the organisations launched a Tourism Manifesto urging the public authorities to adopt emergency measures to reduce the pandemic's devastating impact on the sector, noting that millions of jobs were at stake as well as the survival of thousands of small and medium-sized enterprises (SMEs). The text was addressed to governments and the European Commission, and calls on them to authorise

25. The text of 17 March 2020 was not formally negotiated in the context of the SSDC.

state aid, facilitate access to liquidity loans, provide tax relief, give workers access to partial and temporary unemployment measures, and simplify certain rules (particularly in relation to visas).

A third text was adopted on 27 November by HOTREC and EFFAT when the second wave of the pandemic looked likely to be taking hold in Europe. In it, they called for the rapid deployment of the EU Recovery Plan adopted by the European Council in July. They called for hospitality and tourism to be placed at the heart of National Recovery and Resilience Plans (NRRPs). Finally, they called for an extension of all emergency measures (such as short-time work schemes) at least until September 2021, including for seasonal and temporary workers.

Live performance

The second sector to take urgent action was live performance. The sudden closure of places of entertainment and the cancellation of concerts, exhibitions and various events hit the sector in a unique and exceptional fashion, as was the case for the horeca sector. However, the difference was that live performance is very much a moveable feast that crosses borders, and so, in addition to the economic impact, difficulties were caused by the lack of coordination between Member States of national measures.

As early as 12 March 2020, the social partners in the sector issued a distress call to governments, urging them to adopt rapid emergency funding measures to address the situation and protect the security and livelihoods of workers in the cultural sector. The European association for the sector's employers, 'PEARLE* – Live Performance Europe' (theatres, orchestras, concert organisers, dance companies, festivals, etc.), represents over 10 000 organisations, while the workers are represented by the EAEA – European Arts and Entertainment Alliance – a federation of some 150 trade unions, guilds and associations and over 600 000 artists, technicians and staff in the music, performing arts and live sector.

They said that the bans on large gatherings and the cancellation of events and tours should be accompanied by support measures because workers, whether employed or freelance, faced a sudden, dramatic loss of income. The Coronavirus Response Investment Initiative (CRII) outlined by the European Commission should benefit 'the live performance sector in proportion to the unprecedented challenge that it is currently facing and all workers, regardless of their contractual status'.

In a second text adopted on 14 October, i.e. after the first wave but just as the second wave was about to strike, the social partners raised the matter of how unsuitable existing European instruments were when dealing with the specific circumstances of their sector. The live performance sector had a high number of SMEs, independent and freelance workers who are 'very vulnerable and often face limited access to, or overall exclusion from, cross-sector financial and economic relief programmes or social support schemes that mitigate the impact of the crisis'. For that reason, they insisted that the EU recovery plan and the existing measures and policies should explicitly instruct the Member States to provide sector-specific support.

They also criticise the lack of coordination among Member States with regard to travel and safety measures. This makes cross-border mobility difficult for artists, cultural professionals and organisations who need to be able to tour to make a living. It constituted another barrier to the recovery of activity in the sector. Finally, they called on the European institutions and national governments to adopt, as a matter of urgency, a ‘coordinated approach including short-term support measures and long-term investment to save the European cultural sector’.

Table 4 Live performance – two joint ‘Covid’ texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
12/03/2020	<i>Covid-19: State of emergency in the live performance sector!</i>	Calls on governments to take emergency measures to enable the sector to cope with the ban on gatherings; protect cultural workers' safety and their livelihoods.	Rapid emergency finance measures to cope with loss of income.	At European level, ensure that the Coronavirus Response Investment Initiative also benefits the cultural sector commensurate with the losses suffered.
14/10/2020	<i>European Social Partners of the Live Performance Sector call for a coordinated action plan to secure the recovery and sustainability of the European cultural sector</i>	Ensure access for the cultural sector to cross-sector instruments such as the REACT EU assistance scheme, the Digital Europe programme or the Creative Europe Programme.	Ensure genuine coordination between the Member States on travel and safety measures and exemptions for artists, cultural professionals and organisations that are highly dependent on cross-border mobility.	Provide a long-term investment commitment to secure the sustainability of the European cultural sector. Routinely include the live performance sector in investment programmes and adopt sector-specific measures addressing the sector's specific needs.

Football

In March 2020, during the first wave of Covid-19, Europe suspended the vast majority of its football competitions. From 13 March, UEFA club matches were postponed, whether Champions League, Europa League or Youth League. On 17 March, UEFA postponed EURO 2020 for a year, which had been due to be played in 12 cities in Europe between 12 June and 12 July 2020, and put all competitions and matches (including friendlies) for clubs and national teams on hold ‘until further notice’. The postponements and suspensions linked to bans on gatherings had an impact not only on players but also on all clubs, supporters, officials (referees) and staff (trainers, medical staff, etc.). The economic cost was ‘huge’, to quote Aleksander Čeferin, the President of UEFA.²⁶

A peculiar feature of professional football – one that it shares to some degree with live performance – is that it is highly international. Competitions often involve a lot of international travel, which ‘significantly increases the exposure of football players to specific risks related to Covid-19. The dynamic development of the global pandemic means that players might travel to, through and within destinations with a high risk classification as defined by public authorities’ (joint text of 21 August 2020).

²⁶. <https://fr.uefa.com/insideuefa/about-uefa/news/025b-of8e76b38b88-eof4a514842d-1000--1-uefa-reporte-1-euro-2020-de-12-mois>

On 17 March, the Union of European Football Associations (UEFA), as the governing body of European football and the umbrella organisation for 55 European national associations, held a meeting with representatives of the European Club Association (ECA) which represents 246 football clubs, the Association of European Professional Football Leagues (European Leagues, EL), which represents club football employers from around 1 000 clubs in Europe, and FIFPRO Europe, the players' trade union in 31 European countries.

This meeting coordinated and facilitated the unanimous adoption by the stakeholders present of the emergency plan to suspend matches for the 2019-2020 season in the competitions for men's and women's national teams, under-21s (Euro U21) and in national club competitions. The meeting of 17 March also led to the decision to establish a working group as a matter of urgency (UEFA, leagues and clubs) to coordinate scheduling matters and find sensible solutions to resume and end the season. Another working group that included the players' union (FIFPRO Europe) was established to assess the economic, financial and regulatory impact of the Covid-19 epidemic and propose measures to help mitigate the pandemic's consequences.

In a second joint text adopted in August 2020, the ECA and FIFPRO set out specific guidelines for the sector to protect players' health and safety. Eight areas were addressed: players' health and safety; off-season breaks; retraining and injury prevention; additional holidays if required including in-season breaks necessary for the protection of players' health; management of friendly matches; workload management; guidelines to prevent scheduling clashes; and, finally, future drafting of standards and best practice for off-season breaks, in-season breaks, retraining periods and player load management (e.g. minimum rest periods between matches).

We can see, therefore, that the social partners in the professional football sector managed the impact of the pandemic through negotiation and mutual, reciprocal undertakings, without addressing a single request to the European institutions or national governments.

Table 5 Football – two joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
17/03/2020	<i>Resolution of the European football family on a coordinated response to the impact of the Covid-19 on competitions</i>	Decision to suspend football competitions at all levels until further notice, and postponement of major competitions (Euro 2020).	Establishment of working groups to coordinate scheduling matters and the end of the football season.	Establishment of a working group to assess the impact of the pandemic in terms of economic, financial and regulatory costs, and propose measures to mitigate that impact.
21/08/2020	<i>International guidelines on player health under the 'Emergency International Match Calendar – Period 2020 to 2023'</i>	Coordinate sector stakeholders (players, clubs, leagues and federations) to protect players' health and well-being during the pandemic.	Find solutions to holding and scheduling competitions through dialogue involving all parties.	Jointly draw up guidelines to protect player's health and well-being, including player load management, injury prevention, etc.

Transport

The transport sector (all forms) is behind 10 joint texts on the management of the pandemic, making it one of the most active sectors with close to 20% of all Covid-19 texts in 2020. This is, of course, related to the exceptional impact that measures to counter the pandemic have had on the movement of people and goods: for example, lockdowns, travel restrictions or bans and border closures. Ironically, transport has a crucial role to play in a pandemic in supplying food, goods and essential products, including drugs and medical devices to overcome the crisis.

The social partners in the maritime transport sector were the first in transport to react to the crisis and did so on 18 March (see below). A few days later, on 23 March, 33 associations and federations representing all modes of transport and all stakeholders in the sector — airlines, railways, road hauliers, inland waterways, shipping brokers and agents, logistics, shipowners, captains, etc.²⁷ adopted a joint declaration, which to our knowledge is unprecedented in the history of European social dialogue in the transport sector.

Associations, employers and workers representing the entire EU transport sector highlight in the text that, since transport infrastructures are critical, there must be continuity of transport services. To that end, the Member States should 'enable smooth border crossings for freight transport, both intra-EU and with third countries, in this respect fully support the establishment of green freight lanes in coordination with the concerned transport stakeholders'. In what would become a recurrent theme in the transport sector during the pandemic, they also highlight the need for the Member States to coordinate their response to the crisis and to follow the European Commission's guidelines on border management.

Where the sector's workers are concerned, they call on the Member States to facilitate their mobility (including repatriation where necessary), while driving

27. **A4E** – Airlines for Europe; **AIM** – European Brands Association; the European Technology Platform **ALICE**; **BPO** – Baltic Ports Organisation; **ARDAN** – Solutions for innovation; **CER** – Community of European Railway and Infrastructure Companies; **CLECAT** – European Association for Forwarding, Transport, Logistics and Customs Services; **COCERAL** – European association of trade in cereals, rice, feedstuffs, oilseeds, olive oil, oils and fats, animal feed and agrosupply; **EBU** – European Barge Union; **ECASBA** – European Community Association of Shipbrokers and Agents; **ECSA** – European Community Shipowners' Associations; **EFIP** – European Federation of Inland Ports; **EIM** – European Rail Infrastructure Managers; **EMPA** – European Maritime Pilots' Association; **ERFA** – European Rail Freight Association; **ESC** – European Shippers' Council; **ESO** – European Skippers' Organisation; **ESPO** – European Sea Ports Organisation; **ETF** – European Transport Workers' Federation; **EuDA** – European Dredging Association; **FEPOR** – Federation of Private Port Operators and Terminals; **FERRMED** – Association to improve Railfreight Transportation; **Logistics UK** – formerly the Freight Transport Association (**FTA**); **INE** – Inland Navigation Europe; **IWI** – Inland Waterways International; **IWT** – European Inland Waterway Transport Platform; **POLIS** – European Cities and Regions Networking for Innovative Transport Solutions; **SEA EUROPE** – the voice of civil and naval (maritime technology) industries in Europe; **UETR** – European Road Haulers Association; **UIP** – International Union of Wagon Keepers; **UIRR** – International Union for Road-Rail Combined Transport; **UNIFE** – Association of the European Rail Supply Industry; **Unistock Europe** – European association of professional portside storekeepers for agribulk commodities.

home the need to protect their health and safety through personal protective equipment, as well as access to washing and toileting facilities, and food in Covid-safe conditions. Finally, the signatories urge the public authorities to assist the sector in its recovery.

Table 6 Transport (all modes) – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
23/03/2020	<i>Covid-19 Transport keeps us going</i>	Ensure smooth border crossings for freight transport. Coordinate national measures and follow European guidelines on border management.	Provide workers with personal protective equipment, as well as access to washing and toileting facilities, food and drinks.	Provide public assistance to the sector in its recovery.

Maritime transport

The social partners in the maritime transport sector reacted to the crisis at a very early stage. The sector is one of the lynchpins of both EU external trade, 76% of which is transported by sea, and carriage of goods within the EU, where it has a share of 32%. It is therefore an essential sector in many supply chains (energy, foodstuffs, drugs and other essential goods). Many of the measures taken to combat the pandemic had a significant impact on global shipping operations, e.g. a complete halt to maritime traffic between specific places, operational restrictions on calls at port, a lack of cargo and non-availability of crews.²⁸ Among other things, this led to a shortage of mechanical and electronic parts for vessels and a rise in the number of vessels out of service. Moreover, cruise ships were not authorised to dock in ports in certain countries and had to return to their home ports in Europe.

In view of this disruption to activity in the sector, on 18 March 2020, the social partners ECSA (European Community Shipowners' Associations, representing 20 national associations), and the ETF (European Transport Workers' Federation, representing more than 270 000 seafarers²⁹), adopted an initial joint text in the form of an open letter to EU Transport Ministers. The letter addresses three aspects of the pandemic specific to economic activity in the maritime transport sector:

1. Social aspect:

- impact on seafarers and movement of ships' crews (ability to join and leave ships), measures restricting free movement of people, and port closures; the social partners call for seafarers to be exempted from national travel bans, and to be treated pragmatically when returning home from their ships (recognition of seafarers' key worker status);
- maximum period of service: apply a pragmatic approach to rules on time spent on board ships and permit crew members to remain on board at

²⁸. At the time of writing (March 2021), the issues that beset global maritime transport are far from being resolved. See: *NYTimes*, 6 March 2021: 'I've Never Seen Anything Like This': Chaos Strikes Global Shipping.

²⁹. According to the European Commission (2020b), around the world roughly 600 000 seafarers of all nationalities serve on board vessels in which the EU has an interest.

their own request or in view of the implications of the pandemic, longer than specified in their employment agreements or under applicable national laws applying the Maritime Labour Convention (one of the sensitive areas of negotiation between the social partners);

- seafarers' certificates: where seafarers are unable to do the necessary training required for an extension of their certificate(s) (and their certificate(s) may expire), the social partners call for the validity of the certificates to be extended by at least three months;
- redundancies affecting on board and onshore staff: put in place special assistance measures to safeguard jobs in view of necessary adjustments to operations and costs (specific social protection measures for seafarers or coverage of a percentage of wages);
- on board inspections: address the issues encountered by inspectors when accessing vessels and conducting legally required inspections (relating to safety, the environment and training).

2. Operational aspect:

- supply lines: keep supply lines open and authorise vessels to dock where necessary so that products and supplies can reach the ships;
- certification of ships: extend the validity of the current ships' certificates by at least three months given that it is becoming increasingly difficult for ships to dry dock in time (if renewal of the certificate requires dry-docking);
- consistent measures: in view of different national approaches to docking, cruise ships require assurances that they will be able to enter ports, berth and disembark passengers and crew, permitting repatriation.

3. Economic aspect:

- financial aid: in view of the prospect of a decline in global shipping and demand for tonnage (because of the recession), the Commission and Member States should help the banks to resolve shipowners' immediate liquidity issues;
- the measures announced by the ECB³⁰ should be implemented without delay in order to enable banks to continue to finance the maritime transport sector;
- state aid: given the special circumstances, the EU and the Member States should be flexible when applying competition rules to state aid.

Despite this appeal to EU Transport Ministers and the worsening pandemic and economic situation, the sector continued to face serious issues associated with national restrictions and unilateral decisions to close borders, hampering travel by seafarers seeking to rejoin their ships, or exercising their right to shore leave and repatriation at the end of their tours of duty. On 8 April, the European Commission published a Communication entitled 'Guidelines on protection of health, repatriation and travel arrangements for seafarers, passengers and other persons on board ships'.³¹ In a letter of 14 April to the Transport Commissioner, Ms Adina

³⁰. https://www.ecb.europa.eu/press/pr/date/2020/html/ecb.pr200312_2~06c32dabd1.en.html

³¹. European Commission (2020b).

Vălean, the social partners called on her to take coordinated action to facilitate crew changes. In particular, they called for a proposal to be made to the Council for a political agreement regarding designated ports for crew disembarkation and crew changes, having regard to geographical spread, capacity, proximity to health facilities and international airports.³² They also called on the European External Action Service (EEAS) to assist in repatriating European seafarers stranded in third countries or on vessels that have not obtained permission to dock, as well as third-country seafarers stranded in the EU.

A third text was adopted on 12 May, again in the form of a letter to the Transport Commissioner, Ms Adina Vălean. The text notes that seafarers were still encountering difficulties in travelling, embarkation and disembarkation, and therefore called for a consistent plan for all transport activities and services (maritime, aviation and land transport). A plan of this kind would ensure a uniform approach across the Member States and secure the continuation of services necessary to the transport sector (health, accommodation for overnight stays, police, border controls, visas, etc.). The social partners also note the importance of cooperation at international level with the International Maritime Organization (IMO) given the global nature of maritime transport: coordination at this level is required in order to facilitate seafarer travel, crew changes and to better address the restrictions introduced by many countries. Finally, the social partners reiterate the need to comply with pre-boarding requirements in third countries, including medical tests and visa applications (third-country seafarers should be able to obtain Schengen visas in their home countries).

A fourth Covid-19 text was published on 22 May 2020 by the social partners ECSA, the ETF and the European Maritime Pilots' Association (EMPA), which represents around 4 500 marine pilots from 19 European countries (EU and non-EU³³). The text concerns protective measures to minimise health risks between vessels' crews and external workers visiting the vessel, including pilots. In the Communication referred to above,³⁴ the European Commission noted that 'Contact between crew and port workers, including pilots, should be reduced to an absolute minimum to protect all persons from risk of transmission of Covid-19. For any necessary contact, personal protective equipment (PPE) should be worn and social distancing measures put in place.' However, the social partners note that the governments of the Member States have adopted their own national guidance regarding the use of PPE and social distancing which has led to diverging guidance from the port and flag states. Those on board were concerned that shore-based personnel boarding a ship might bring the coronavirus onto the vessel because they do not observe the safety protocols in the same way. Therefore, the signatories called on the Member States to adopt a common approach in ports ensuring the use of PPE, social distancing of at least 1.5 m and temperature testing.

32. In its Communication, the European Commission recommends: '(...) Member States should, in coordination among themselves, designate several ports in the Union for fast-track crew changes. The ports should be geographically dispersed so as to cover the Union and should be connected to operational airports and rail stations.'

33. In the Baltic Sea, the North Sea, the Atlantic Ocean, the Mediterranean and the Black Sea.

34. European Commission (2020b).

Table 7 Maritime transport – four joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
18/03/2020	<i>Joint letter to EU Ministers of Transport 'The shipping industry urgently needs special regulatory measures and actions to prevent a total collapse of seaborne trade to and from the EU' – Covid-19</i>	Social aspect: movement of seafarers, movement of crews, period of service on board, certificates, redundancies, inspections.	Operational aspect: open supply lines, extend the validity of vessels' certification, ensure consistent measures for EU ports.	Economic aspect: provide financial aid to the sector (shipowners' liquidity), ensure that banks will continue to finance the sector, authorise state aid.
14/04/2020	<i>Facilitation of crew changes – Social partners' call for coordinated EU action – Covid-19</i>	Coordinated action to facilitate crew changes, political agreement regarding designated ports.	Repatriation of EU seafarers stranded in third countries.	Repatriation of third country seafarers stranded in the EU.
12/05/2020	<i>Request for coordination on EU level implementing IMO Framework of Protocols for ensuring safe ship crew changes and travel during the coronavirus (Covid-19) pandemic</i>	Coordination and uniform approach to national measures to secure the continuation of services necessary to the transport sector.	International cooperation to facilitate travel by seafarers, crew changes, and to address the restrictions introduced by many countries.	Compliance with pre-embarkation requirements in third countries (visas, medical checks).
22/05/2020	<i>Joint statement on protective measures to minimise risks between crew and shore based personnel boarding a ship (Covid-19)</i>	Common approach by the Member States to health and safety protocols regarding contact between crews and port workers, including pilots.	-	-

Civil aviation

Civil aviation is one of the sectors that has been hit most severely by the Covid-19 pandemic, in terms of both airline activity, activity at airports and the activity of suppliers of air navigation services. Travel restrictions, lockdowns and restrictions on movement grounded a high proportion of the air fleet and aircrew. The International Civil Aviation Organization (ICAO) has published data on the operational impact (number of flights, number of seats), the economic impact (income of air carriers, airports and service providers) and the use of aircraft.³⁵ It is clear from those data that there was a drop of more than 52% in air traffic in Europe compared to 2019. Aviation accounts for around 5 million jobs in the EU and contributes up to EUR 300 billion to European GDP, or 2.1%, according to the Commission.³⁶

The social partners in European civil aviation first tackled this issue on 27 March, when they first called for the EU institutions and the Member States to take urgent action. It should be noted that European social dialogue in the civil aviation sector involves a number of stakeholders, from airlines, pilots, ground and air cargo handling services (such as ground operations, cleaning, refuelling and baggage handling), air traffic controllers and other subsectors. This is reflected in a wide range of employer and employee organisations (see box) that sometimes leads to difficulties concerning the responsibilities assumed by each of them – airlines,

³⁵. <https://data.icao.int/Covid-19/operational.htm>

³⁶. https://ec.europa.eu/transport/modes/air_en

airports, etc., including in relation to personal protective equipment and Covid test procedures.

European social partners in the civil aviation sector

- **Air traffic controllers** and air traffic safety personnel (Air Traffic Controllers European Unions Coordination, ATCEUC): the voice of 32 professional and autonomous trade unions representing more than 14 000 air traffic controllers (ATCOs) and air traffic safety electronic personnel (ATSEPs) throughout Europe;
- **Airlines and constructors** (Airlines for Dialogue, A4D): represents 16 airlines covering more than 70% of European air traffic as well as global constructors (Airbus, Boeing, Embraer, GE and Thales);
- **Airlines** (Airline Coordination Platform, ACP): a lobbying platform that is the voice of around 10 airlines (1 300 aircraft) and represents the airline employers in social dialogue;
- **Airports** (Airports Council International Europe, ACI Europe): represents more than 500 airports in 46 European countries;
- **Airport services** (Airport Services Association, ASA): represents the independent ground and air cargo handling industry, acts as an umbrella for 51 ground support service companies;
- **Air traffic management** (Civil Air Navigation Services Organisation – Europe, CANSO Europe): umbrella organisation for providers of air navigation services, the air traffic management industry and specialists;
- **Aircraft pilots** (European Cockpit Association, ECA): represents more than 40 000 European pilots from the national pilot associations in 33 European states;
- **Transport workers** (European Transport Workers' Federation, ETF): represents 386 000 workers in the civil aviation industry, ground staff, cabin crew, air traffic management.

In September 2020, they were joined by two organisations:

- **Regional airlines** (European Regions Airline Association, ERAA): represents around 60 regional airlines and 150 associate members;
- **International representation** in Europe of airlines (Airlines International Representation in Europe, AIRE).

In their text of 27 March, the eight organisations jointly called on the European institutions and the national governments to take urgent measures in four areas:

- **health and safety of staff and passengers:** the European Air Safety Agency played a key role in publicising operational measures to be taken in the sector to prevent the spread of the coronavirus.³⁷ These were welcomed by the social partners who insisted on the need for a coordinated approach by the Member States and on the establishment of coordinated hygiene protocols for aviation-related activities;

37. See <https://www.easa.europa.eu/easa-Covid-19-resources>

- **air connectivity:** the signatories called for airspace in the European Union to remain open subject to Covid-related requirements to enable minimum connectivity, emergency services and repatriation flights;
- **economic support and protection of workers:** in this area, they call for a flexible approach to state aid and the fiscal framework, the abolition of European and national aviation taxes, the protection of workers from unemployment and loss of income (including the self-employed and those in insecure jobs);
- **slots:** immediate relaxation of slot allocation rules under which air carriers must use at least 80% of their allocated slots within a given scheduling period on penalty of losing them.

The signatories also recall the importance of social dialogue in managing the crisis and providing aid to the sector.

In a second text adopted on 13 May 2020, three of the organisations in the sector focus on one matter in particular: the validity of ground handling licences. The three organisations in question are those representing airports, air service providers and workers in the sector (ACI Europe, ASA and the ETF respectively). Their joint request to MEPs who were due to make a determination on the proposal for a European directive on ground handling services³⁸ concerned a three-year extension of the validity of ground handling licences and the possibility of granting temporary licences. According to the three social partners, the extension was crucial to protect jobs and secure operational continuity of airport operations across Europe.³⁹

On 21 September, the eight organisations in the European Regions Airline Association (ERA, which represents some 60 regional airlines and 150 associate members), and Airlines International Representation in Europe (AIRE) expressed their ‘deep concern over the current patchwork of closed or open borders within the Union, resulting from widely different policies in Member States as to how to limit the spread of the Covid-19 virus’. Noting that 80% of countries across the globe were restricting entry to their territories or had a complete ban on flights, they criticised the European patchwork of measures that made it impossible for airlines, service providers, clients, suppliers and travellers to plan ahead. The signatories also regretted that many Member States were not applying the recommendation of the EU Council of 30 June 2020 on the temporary restriction on non-essential travel into the EU and the possible lifting of such restrictions⁴⁰ (the recommendation stated that, as from 1 July, the Member States should begin to lift

38. The Commission’s proposal was regarded as insufficient to ensure the financial and operational continuity of ground handlers and their staff in these exceptional circumstances. European Commission (2020d).

39. Parliament’s position (adopted on 15 May with 641 votes in favour, 29 against and 17 abstentions) provides that carriers may retain their operating permits for a period of one year and that ground handlers are able to extend their contracts until 2021, or even do so again until 2022 (Agence Europe).

40. https://data.consilium.europa.eu/doc/document/ST-9208-2020-INIT/en/pdf?utm_source=dsms-auto&utm_medium=email&utm_campaign=Council+agrees+to+start+lifting+travel+restrictions+for+residents+of+some+third+countries

the travel restrictions at external borders for the residents of 15 third countries). The text therefore calls for the harmonisation of national measures and practices to make it possible to plan operations with confidence, which would help activity to recover. The Member States should use the 'effective coordination' between ICAO and IATA, supported by the WHO on the one side, and the European bodies EASA and the Commission, supported by the European Centre for Disease Prevention and Control (ECDC) on the other side, to put measures in place to ensure that conditions on board and on the ground comply with public health measures, and thereby regain trust. They urged the Member States to adopt the Commission's proposal for a recommendation on a coordinated approach to the restriction of free movement published on 4 September,⁴¹ reiterating the need to 'cooperate (...) to make sure borders are re opened in a harmonised and coordinated manner to facilitate and contribute to the economic recovery of the Union and sustain employment'. Finally, the social partners call on the Commission and the Member States to define criteria for a risk-based consideration of third countries and the lifting of associated entry bans.

The final text adopted in 2020 by civil aviation stakeholders concerns payroll support schemes for aviation in response to the pandemic. During the first wave of the pandemic in Europe, most Member States put payroll support schemes in place. The schemes kept thousands of workers in civil aviation in employment at a time when European airlines were set to lose almost EUR 18 billion over the year. When the first wave appeared to be over and a quick recovery looked in prospect, some Member States began to abolish some of the support schemes. The joint position, adopted on 22 October by the 10 organisations involved, called instead for the public authorities to continue their payroll support schemes, through sector-specific arrangements where appropriate. The best case scenario, they wrote, is 'likely a 3 – 5 year phased return to pre Covid-19 travel demand, against the backdrop of a global recession.'⁴²

The early autumn also saw a resurgence of the virus in some Member States (this would result in the second wave over autumn-winter 2020-2021). Another argument was put forward: maintaining sufficient capacity throughout the whole aviation ecosystem and workers in possession of valid licences who were ready to return to their jobs to transport vaccines when they were ready, would be the 'largest single transport challenge in history requiring the equivalent of over 8 000 747 cargo aircraft'.⁴³ Hence the 10 signatory organisations called on the Member States not to abolish or reduce their payroll support schemes, as doing so would endanger employment and the European transport infrastructure.

41. European Commission (2020c).

42. <https://www.aci-europe.org/press-release/273-airports-applaud-ec-coordination-framework-as-stalled-recovery-figures-are-released.html>

43. 'Just providing a single dose to 7.8 billion people would fill 8,000 747 cargo aircraft', according to IATA (<https://www.iata.org/en/pressroom/pr/2020-09-09-01>).

Table 8 Civil aviation – four joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
27/03/2020	<i>Effects of Covid-19 and need for action in European aviation. Joint appeal to the EU institutions and the Member States</i>	In addition to the EASA safety directives, draw up new, coordinated hygiene protocols for staff and passengers.	Ensure a minimum level of connectivity and keep European airspace open; use travel bans only as a last resort.	Support the sector and jobs: state aid, abolition of aviation taxes, protection of workers against unemployment and loss of income, relaxation of slot allocation rules.
13/05/2020	<i>Covid-19 – European airports, transport workers and aviation suppliers call for urgent support in joint statement</i>	Extend the validity of ground handling licences for three years and grant temporary licences.	-	-
21/09/2020	<i>Statement to the Council by the Social Partners in the Civil Aviation Sectoral Social Dialogue Committee on the response to Covid-19</i>	Harmonise national measures and practices to facilitate operational planning.	In order to regain trust, put harmonised measures in place to ensure Covid-secure conditions on board and on the ground are in compliance with Covid-related requirements.	At European level, define criteria for a risk-based consideration of third countries and the lifting of associated entry bans.
22/10/2020	<i>Joint Statement by the European social partners in Civil Aviation on payroll support schemes for aviation in response to the Covid-19 pandemic</i>	Continue payroll support schemes specific to the civil aviation sector.	-	-

Road transport

Like the other modes of transport (maritime and air), road transport was severely affected by the measures taken in Europe to combat the coronavirus. Movement restrictions on goods and passengers, and border restrictions (closures and controls), as well as the various transport-related procedures such as quarantines, health inspections and documents, led to a sharp decline in activity. During the first lockdown in spring 2020, all subsectors were affected, from carriage of goods to passenger transport, including public transport and tourism transport. IRU states that 'Goods road transport companies globally are forecast to lose USD 679 billion, down 18% on 2019. More broadly, IRU estimates the losses for the global road transport sector – passenger and goods – to exceed USD 1 trillion in 2020. And there are worrying signs for 2021. Financial indicators paint a bleak road ahead, with high default and insolvency risks facing road transport firms worldwide.'⁴⁴ The role of road transport is to ensure smooth trade between and within countries, to transport essential goods and carry passengers.

The European road transport representatives from the trade unions and control authorities used European sectoral social dialogue to inform the EU and the Member States of the conditions in which they were able to continue to play their role (see box). To that end, they adopted a joint text on 29 May 2020 bearing the perhaps hasty title 'Efficient enforcement in the aftermath of the Covid-19 pandemic' (because the 'aftermath' would include further waves).

44. See: <https://www.iru.org/resources/iru-library/Covid-19-impacts-road-transport-industry-executive-summary>

Social partners in the road transport sector

- The International Road Transport Union (IRU) represents more than 3.5 million businesses operating mobility and logistics services in over 100 countries;
- The European Transport Workers' Federation (ETF): the road transport section has 80 affiliates in the road transport sector from 31 European countries;
- The Confederation of Organisations in Road Transport Enforcement (CORTE) has 33 full members representing the national transport control authorities in Europe (Ministries, police and government transport series) along with twelve associate members and a number of observers;
- Euro Contrôle Route (ECR) is a group of European road transport inspection services in 14 European countries and two observer countries;
- The European Roads Policing Network (ROADPOL) is a network of traffic police forces from around 30 European countries.

The top concern on the employers' (IRU) side is the number of companies that are facing liquidity problems and risking bankruptcy. They note that, in Europe during the spring 2020 lockdown, revenue in the goods transport sector declined by up to 50% during the lockdown, whilst for passenger transport in some cases the figure rose to 100%. Road transport businesses and professional drivers have been facing many challenges, including temporary short- or longer-term unemployment for some drivers and, for others, much longer waiting times at internal and external EU borders and other temporary control points, new documentation procedures and requirements in some countries for vehicles to travel in convoy. At the same time, control authorities faced difficulties in enforcing regulations and carrying out roadside inspections in adequate Covid-safe conditions.

Emergency measures and exemptions from rules and regulations were introduced in order to maintain supply chains, but the signatories to the text note that the patchwork of inconsistent national rules within the EU makes compliance partly unenforceable, especially with regard to driving and rest-time rules and the expiry of control documents such as driving licences and certificates of professional competence. In order to protect the health and safety of workers and enforcement officials, and to ensure road safety and a level playing field for all market stakeholders, the social partners call for best enforcement practices to apply during unlocking (this text was signed at the end of May), and for them to remain in place for as long as there are temporary restrictions on the movement of people and goods. In particular, they call for:

1. enforcement to have regard to the exceptional circumstances without resulting in longer roadside inspections;
2. enforcement authorities to use sound judgement and tolerance in relation to infringements occurring from mid-March to end-May 2020, including those concerning rules governing driving and rest times (bearing in mind the host of national exemptions);
3. enforcement authorities to extend the validity of certain certificates, licences and authorisations, and to postpone certain periodic checks and periodic training;

4. smart enforcement practices such as intelligence sharing between Member States to remain a priority, as the current exceptional circumstances increase the need for efficient enforcement;
5. digital enforcement to be used whenever feasible to minimise physical contact and maintain social distancing.

They also call on the European Commission to publish a list of all temporary relaxations of rules governing driving and rest times, and to centralise and communicate all specific national measures and exemptions to the road transport and enforcement community.

Table 9 Road transport – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
29/05/2020	<i>Efficient enforcement in the aftermath of the Covid-19 pandemic</i>	Have regard to the exceptional circumstances when enforcing existing legislation; demonstrate flexibility with regard to rules governing driving and rest times; use digital enforcement to reduce health risks.	Extend the validity of certificates, licences and authorisations; defer certain periodic checks and periodic training; share intelligence across Member States.	Publish a list of all temporary relaxations of rules governing driving and rest times, and of exemptions.

Ports

Three quarters of the goods entering or leaving Europe go by sea, attesting to the vital role that the port sector plays in the logistics chain. Ports are thus critical infrastructure of major importance to the internal market. The European Union has around 250 000 dockers, and about 3 million people work in related sectors.⁴⁵ In coastal regions, ports are often a major employer, and they also indirectly support many more jobs (in logistics, transport, etc.). As in maritime transport, the measures taken to combat the pandemic have had a direct impact on the port sector, including operational restrictions on calls at port for transport ships, a reduction in or complete halt to maritime traffic and a lack of cargo.

As early as 18 March, ESPO, the ETF and FEPORT, the social partners in the ports sector (see box), adopted a joint text on protecting the health and safety of workers in the sector.

Working on the principle that the closure of borders to people should not stop the movement of goods, or the loading and unloading of essential goods, in particular food and drugs, the social partners share the view that top priority must be given to health and safety matters, and to compliance with and effective implementation of strict measures in ports. In particular, ESPO noted that port operators should be deemed a priority group for the distribution and allocation of preventive and protective equipment such as disinfectants, masks and gloves.⁴⁶

45. https://www.etf-europe.org/our_work/dockers

46. <https://www.espo.be/news/Covid-19-europes-ports-call-on-eu-and-member-sta>

Social partners in the port sector

Ports:

- The European Sea Ports Organisation (ESPO) represents the port authorities, port associations and port administrations of the seaports of the European Union and Norway.

Dockers:

- The European Transport Workers' Federation (ETF) Dockers Section represents dockers, white-collar employees in terminals and port authorities, maintenance workers, and other categories of workers in port operations and port logistics.
- The International Dockworkers Council (IDC) represents more than 90 000 dockworkers around the world.

Port companies:

- FEPOR represents more than 1 225 businesses, terminal operators and stevedoring companies carrying out activities in the seaports of the European Union (425 terminals).

The social partners also urge the Commission to provide clear European guidance on health contingency measures to be applied in ports and to recommend that Member States should take all necessary measures in that regard. Finally, in view of the global economic consequences of the pandemic, the signatories call for economic support for businesses in the sector in order to prevent disruption to the logistics chains and job losses.

Table 10 Ports – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
18/03/2020	<i>Joint statement 'ETF, FEPOR, IDC and ESPO call on workers and employers to strictly respect health and safety measures during Covid-19 pandemic'</i>	Implement and comply with health and safety measures in EU ports; provide protective equipment.	Call on the Commission for clear guidance regarding health contingency measures applicable in ports.	Draw up economic support measures for businesses in the sector.

Sugar

Europe is the world's third largest producer of sugar after India and Brazil, and its third largest exporter after Brazil and Thailand. The industry provides a living for around 123 000 sugar beet farmers, and provides employment to 360 000 workers, chiefly in rural areas. The Covid-19 pandemic reached Europe in March, i.e. early spring, during the sowing period when sugar beet farmers are enormously busy in the fields. Since the end of March, businesses in the sector have responded to the

rise in demand for the health equipment required because of Covid-19 by shifting their ethanol production to pharma-grade in order to manufacture alcohol-based gel.⁴⁷

However, since the beginning of the crisis, the social partners in the sector have been concerned about two main aspects: transport of goods within the Single European Market, and the changes in world sugar prices amid the pandemic.

Social partners in the sugar sector

- **Sugar-beet producers:** the International Confederation of European Beet Growers (CIBE) represents national and regional associations from 17 European beet-producing countries, including 140 000 growers in 15 EU countries (and a further 130 000 growers in Turkey and Switzerland);
- **Sugar businesses:** the European Association of Sugar Manufacturers (CEFS) represents 38 European businesses and 23 000 direct jobs;
- **Workers:** EFFAT, the European Federation of Trade Unions in the Food, Agriculture and Tourism sectors, represents 120 national trade unions in 35 European countries.

On 20 March 2020, they sent a joint letter to the European Agriculture Commissioner, Mr Janusz Wojciechowski, to alert him to ‘the highly worrying situation our European beet sugar sector will have to face in the coming weeks and months following the outbreak of the Covid-19 pandemic’. Turning to the acute matter of the cross-border transport of goods in the pandemic, the signatories call on the Commission and the Member States to take measures to facilitate the smooth flow of cross-border transportation within the EU and with Switzerland.

However, the matter of greatest concern to them are the changes in the world sugar price. The pandemic triggered a severe and sudden drop in commodity prices, which put a damper on global sugar markets. The world sugar price was not a new issue: the social partners had had concerns about it for a long time (see, for example, their Joint Statement on the end of quotas in 2017⁴⁸). However, the situation had been improving as a result of a global production deficit. It was at that very point that the pandemic struck, dragging the world raw sugar price down to its lowest level since 2018. Between mid-February and mid-March 2020, sugar prices dropped by more than 25% on world markets, exacerbating the situation for sugar beet farmers, sugar producers and workers. Consequently, the social partners called on the Commission to be ready to trigger emergency measures, such as aid for private storage, and to introduce import safeguards (temporary import restrictions) to prevent the European sugar price from a further slump that would force a new wave of restructuring and, they stress, threaten the employment of 360 000 workers.

47. See e.g. <https://www.raffinerietirlemontoise.com/nouvelle/la-rt-va-fournir-du-gel-desinfectant>

48. <https://sugardialogue.eu/resource/cefs-and-effat-joint-statement-on-the-end-of-quotas>

Table 11 Sugar – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
20/03/2020	<i>Covid-19 and the EU Beet Sugar Sector</i>	Facilitate the smooth flow of cross-border transportation within the EU and with Switzerland.	Trigger the aid for private storage mechanism.	Introduce import safeguards.

Graphical industry

In March 2020, the graphical industry unexpectedly found itself facing a supply chain problem: a shortage of solvents owing to the sudden increase in manufacture of disinfectants and alcohol-based gel to combat the spread of Covid-19.

The European graphical industry is composed mainly of small businesses, the overwhelming majority of which employ fewer than 10 staff. Overall, the sector comprises some 620 000 workers in 113 000 companies (generating an annual turnover of EUR 80 billion, according to the sector's own figures). The employers' association is Intergraf, representing 21 national printing and digital communication industry federations in 20 countries. The workers' union is UNI Europa Graphical (UNI EG), which represents nearly 200 000 members belonging to 48 trade unions in 32 countries (graphical industries, packaging, paper processing, publishing, newspaper production and allied media industries).

On 21 March 2020, Intergraf and UNI EG adopted a joint text addressed to their affiliates and the public authorities at European and national level. The document calls on all businesses in the sector to comply with preventive measures such as remote working, reorganisation of teams and precautionary measures, while stressing the role of social dialogue in their implementation. At the same time, it calls on public authorities to establish a specific plan to help the sector. First, the social partners underline the key role played by newspapers in keeping the public informed about the virus, especially older people who do not always have access to the Internet and are in a high-risk category. The sector is also vital in the production and supply of food and pharmaceutical packaging, ensuring access to products in supermarkets and pharmacies. The signatories then highlight the two major problems facing the industry, namely the shortage of solvents and access to liquidity and credit.

On solvents, the signatories note that printing works can operate only if they have synthetic ethanol/ethyl alcohol and isopropanol in particular, both of which are also used to produce disinfectants, for which demand has dramatically increased with Covid-19. They stress that, 'While it is important that the supply of synthetic ethanol/ethyl alcohol and isopropanol should first be secured for sanitary purposes, its supply for the continuous production of food and medicines packaging should also be sustained.' Finally, there is the matter of liquidities. In this regard, the social partners call on governments to allow the deferral of taxes and social contributions while also providing state guarantees for credit lines in order to maintain the flow of credit from banks. The signatories call for funding plans to be drawn up at national and European level in order to secure the sector's survival in the medium and long term.

Table 12 Graphical industry – one joint ‘Covid’ text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
21/03/2020	<i>Joint Statement on the Covid-19 crisis</i>	Comply with all preventive measures in businesses and make social dialogue at all levels the focal point for management of the Covid-19 crisis.	Maintain supply chains, particularly for solvents.	Guarantee credit flows to businesses in the sector and draw up a finance plan to secure businesses’ medium- and long-term survival.

Social services

The social services sector is interesting in more than one way. We note, at the outset, that the sector has not hitherto been officially recognised by the EU. There is therefore no European sectoral social dialogue committee (SSDC) for social services. For a number of years, representatives from the social services sector in certain EU countries (chiefly Austria, Belgium, Czechia, France, Germany and Spain) have been involved in a project financed by the Commission to examine the options for establishing a structured European social dialogue in the sector (Degryse 2019). The project, named PESSIS,⁴⁹ covered the period 2015-2017, but has not yet led to the establishment of an SSDC or social partners that are formally recognised by the EU institutions.⁵⁰

Another interesting aspect of the social services is the unexpectedness of some of the ad hoc alliances made with non-traditional economic and social stakeholders, for example associations for people with disabilities, associations of early childhood care providers, associations for the homeless, NGOs, social economy enterprises, etc. In some cases, the stakeholders have been organised at European level for several years, but have little or even no say in European sectoral social dialogue. The ad hoc alliances give a voice to new groups such as undocumented migrant domestic workers (see below). In any event, the health crisis triggered by the pandemic has clearly brought a European dimension in the social services sector into stark relief.

No fewer than four texts have been adopted by various organisations and federations: these include those in the social services and personal care sector, represented by the European Public Service Union (EPSU) and the Federation of European Social Employers; as well as in the personal assistance services sector (early childhood and education, childcare, long-term care for people in a position of dependence, disability, etc.) and the sector providing support for households (cleaning, ironing, gardening, DIY, maintenance, learning support, etc.) where workers are represented by EFFAT and UNI Europa, and the employers by the European Federation for Family Employment and Home Care (EFFE) and the European Federation for Services to Individuals (EFSI). Although the social partner organisations differ in that some provide services to people in institutions and some to people in their homes, for the purposes of this paper we regard ‘social services’ as a single sector.

49. <https://www.socialserviceseurope.eu/peسسis-iii>

50. This is why the joint texts referred to below are not included in the Commission’s official database.

a) The impact on social services and needed support measures

The first text adopted, on 25 March 2020, was a joint call by the European Public Service Union (EPSU) and the Federation of European Social Employers⁵¹ for measures to support the 11 million care and support workers in institutions (nursing homes, healthcare centres, etc.) in the EU who are exposed daily to Covid-19 and are in close contact with older people, people with disabilities and other people in need of care and support. The text sets out the difficulties faced in the sector, which has been underfunded and understaffed for years. The signatories provide the Member States and the Commission with a list of urgent support measures they should take to help the sector cope with the situation, as summarised below:

- **safeguarding the jobs** of providers and workers and their contracts in order to ensure the continuity of care and support services, as well as guaranteeing remuneration and income support;
- **health protection** for workers (protective equipment) and training in safety measures in the workplace;
- establishment of **safety protocols** in nursing homes and other residential care services;
- access by social services to **EU** and national **funds** for immediate financial support for payroll and other costs;
- securing, through national laws or collective agreements, the right to paid sick leave, flexibility and other adjustments that are necessary to **protect health**;
- support to ensure **childcare** is available for children of social services staff;
- exceptions for cross-border care workers, allowing them to **cross national borders** even when they have been closed.

b) Joint Statement on the Covid-19 Pandemic in Personal and Household Services

One week later, another social services subsector expressed its view, this time on behalf of 8 million providers of personal and household services in the home (and doubtless a similar number of undeclared workers). The sector is identified not by a specific activity but by the place where that activity is performed, namely a private home. The activity can be childcare, care for the elderly or people with disabilities, or cleaning, ironing, household repairs, gardening, etc.

On the trade union side, the two federations are EFFAT (European Federation of Trade Unions in the Food, Agriculture and Tourism sectors), representing some 22 million workers in 120 national trade unions from 35 European countries; and UNI Europa, which represents 7 million workers in service industries and comprises 272 national trade unions from 50 countries. The two federations are

51. For the reasons explained above, the Federation of European Social Employers is not (hitherto) regarded as a 'European social partner' by the European institutions. EPSU is recognised as a representative social partner in the following sectors: hospitals, central government, local and regional government, electricity and gas.

recognised social partners for several other sectors.⁵² On the employers' side, there are two federations that are not officially recognised as social partners by the EU: the European Federation for Family Employment and Home Care (EFFE) and the European Federation for Services to Individuals (EFSI), which represents national associations, employers' organisations, public healthcare providers and businesses involved in the development of personal and household services in 21 EU Member States.

The text adopted on 1 April 2020 and supported by the International Domestic Workers Federation⁵³ is addressed to the national and European governments. It highlights two major concerns: ensuring the continuity of services against a background of containment measures and travel restrictions, and guaranteeing the safety of personal and household service (PHS) workers and users. The sector's aim during the pandemic is both to allow healthcare professionals and workers in other key sectors to go to work by looking after their children and to provide home-based care to older people or people with disabilities. However, as the pandemic unfolded, it would also play a special role by facilitating an early return home for certain patients, thus reducing the pressure on hospital beds.

In order to ensure the safety of workers and users, the social partners call on the authorities to ensure access to and training in the use of personal protective equipment (masks, gloves, gel, etc.), and to provide workers in the sector with priority access to Covid-19 screening tests. PPE should be accompanied by clear health and safety protocols for workers and households alike on the preventive measures they must take in their homes. The signatories also call for the authorities to ensure sick leave and access to healthcare for PHS workers and, where necessary, to provide exceptions for migrant PHS workers to cross national borders.

Finally, there is the matter of economic safeguards for the sector during lockdown and the temporary forced reduction in activity. The social partners are of the view that, once the crisis is over, the home care sector could become a major area for growth and employment. But, if that is to happen, the sector must have help to navigate the crisis. Therefore, the signatories also call for:

- eligibility for measures to mitigate the impact of the crisis, such as deferred payment of social security contributions and taxes;
- workers to be eligible for temporary economic unemployment allowances or replacement income top-ups given the low level of wages in the sector;
- clear information for workers, including migrants, about access to social rights and to social protection; extension of residency rights for migrants in the event that they lose their jobs; a specific allowance for undocumented migrant workers if they lose their jobs.

52. For EFFAT: horeca and tourism, contract catering, food and drink industry, sugar and agriculture. For UNI Europa: banking, insurance, industrial cleaning, private security, telecommunications, commerce, live performance, audiovisual, postal services, temporary agency work, personal services (hairdressing) and the graphical industry.

53. <https://idwfed.org>

c) Covid-19 and Social Services: what role for the EU?

The third joint text in the social services sector was signed on 25 June by EPSU and the Federation of European Social Employers, and was supported by 10 other federations and NGOs active in providing aid to people with disabilities, the homeless, the providers of care to older people, services combating poverty, fighting for social justice, social enterprises, etc.⁵⁴ The joint text is underpinned by three key words: recognition, urgency, resilience.

- 1. Recognition:** The signatories note that the tragic situation in long-term care facilities for older people during the pandemic demonstrates the extent to which the real value of care workers in these facilities is not properly recognised: they experience underfunding, unattractive wages and working conditions, and understaffing. Eleven million workers in the EU, and a further several million volunteers⁵⁵ are nonetheless mobilising against injustices, exclusion and discrimination. The signatories call on the EU to strengthen the essential nature of social services within the Recovery Plan for Europe with a view to strengthening social cohesion.
- 2. Urgency:** Greater job insecurity or even impoverishment is likely to be one of the consequences of the economic shock caused by the pandemic in the form of the ensuing recession, bankruptcies and closures of shops and businesses. The post-Covid world will have even greater need for functional social services. The signatories note that the funding measures provided for by the EU and the Member States do not meet the increased expenditure of social service providers (protective equipment, infrastructure expenses, additional staff costs),⁵⁶ yet meanwhile their income is falling. Therefore, a European Emergency Fund for Social Services should be established to ensure the provision of these services and access to them.

54. EASPD: European Association of Service Providers for Persons with Disabilities; it represents more than 11 000 social assistance support and healthcare services; **FEANTSA:** European Federation of National Organisations Working with the Homeless, representing 130 member organisations from 30 countries; **European Ageing Network:** the voice of more than 10 000 organisations providing care for older people in 25 European countries; **Caritas Europa:** a catholic network fighting poverty; a member of Caritas Internationalis, a global network with over 160 members; **CEDAG** a 'voice for the non-profit sector' in areas such as older people, environmental protection, health, consumer protection, and combating discrimination; **EPR Learning & Innovating Together:** represents 24 organisations of service providers from 16 countries working with people with disabilities; **SOLIDAR:** a European and worldwide network of civil society organisations working to advance social justice in Europe and worldwide; it has over 60 member organisations based in 29 countries (24 of which are EU countries); **European Social Network:** a network of more than 120 public authorities responsible for social services at local level in 35 European countries: national associations of directors; social protection departments in ministries, regions, counties and municipalities; regulatory, funding and inspection agencies; universities and other organisations involved in research and development; **Eurodiaconia:** a European network of churches and Christian NGOs providing social and healthcare services and advocating social justice; it is an umbrella organisation for 52 national and regional organisations from 32 countries; **ENSIE:** the European Network of Social Integration Enterprises brings together 29 national and regional networks representing 21 countries across Europe, 3 150 social integration enterprises and around 270 000 employees.

55. Federation of European social employers (2019).

56. https://mcusercontent.com/47548462519f84ab547c39ce9/files/81d8665d-21f5-43ee-884f-b52e973faa55/European_Overview_of_COVID_19_Funding_Needs_in_Social_Services._28.05.2020.pdf

3. **Resilience:** Social services need a sustainable ecosystem based on sound financial policies, as well as sufficient, well-trained staff. The signatories note that the situation varies widely from one EU country to another. In order to prevent increased social divergence in social services across national ecosystems, the EU must play a greater role in funding, policy guidance, support for social dialogue and legislation. The signatories call for a minimum of 5% of the Recovery and Resilience Facility to be allocated to social services, and for 25% of the REACT-EU initiative under the European Social Fund to be allocated to social inclusion measures.

d) Personal and Household Services – Workers Require Priority Access to Covid-19 vaccine

Finally, a fourth text was adopted at end-2020 by EFFAT, EFFE, EFSI and UNI Europa, supported by the International Domestic Workers Federation (IDWF) and UNICARE Global, on the vaccination campaign then being drawn up. The text was a reaction to the European Commission proposal for a coordinated approach to the distribution of vaccines across EU Member States published on 15 October 2020.⁵⁷ The proposal makes no explicit reference to home care and other PHS workers among the priority groups to which Member States would have to ensure easy access to the vaccines. The signatories note that the more comprehensive standards of the World Health Organization (WHO) call for home care workers to be considered ‘essential workers’, and that this means that infection prevention is a priority.

The social partners note that the 6.3 million home care workers in the EU (and an additional 3.2 million undeclared workers) are much more exposed to mutual contamination with Covid-19 than the general public because they work in private households. They therefore call on the Commission to include these workers among the list of priority groups in any future documents setting out Europe’s vaccination strategy, and call on the Member States to include them as such in their national strategies.

57. https://ec.europa.eu/health/sites/health/files/vaccination/docs/2020_strategies_deployment_en.pdf

Table 13 Social services – four joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
25/03/2020	<i>Joint EPSU/Social Employers Statement on Covid-19 outbreak: the impact on social services and needed support measures</i>	Protect the jobs, wages and health of workers in the sector in order to ensure the continuity of care and support services; ensure that they are able to cross national borders.	Establish health and safety protocols for nursing and other residential care services, and access to EU and national funds to meet the cost.	Secure the right to paid sick leave and flexible working. Support for childcare for workers' children.
01/04/2020	<i>EFFAT – EFFE – EFSI – UNI-Europa Joint Statement on the Covid-19 Pandemic in Personal and Household Services (PHS)</i>	Ensure access to protective equipment and screening tests, and devise protocols to ensure continuity of services.	Ensure that businesses in the sector are eligible for public aid and measures to mitigate the economic impact.	Ensure that workers, including migrants, are eligible for temporary economic unemployment, replacement income top ups; ensure access to social rights.
25/06/2020	<i>Covid-19 and Social Services: what role for the EU?</i>	Recognition. Strengthen the essential nature of social services as part of the Recovery Plan for Europe.	Urgency. Establish a European Emergency Fund for Social Services to ensure the provision of these services and access to them.	Resilience. Allocate a minimum of 5% of the Recovery and Resilience Facility to social services, and 25% of REACT-EU to social inclusion measures.
14/12/2020	<i>'EFFAT – EFFE – EFSI – UNI-Europa Joint Statement on Personal and Household Services – Workers Require Priority Access to Covid-19 vaccine'</i>	Give priority access to Covid-19 vaccines to PHS workers, recognise them as essential workers.	-	-

Food and drink industry

'It is our collective goal to make sure that shelves are stacked, and fridges are full. However, this is becoming increasingly difficult,' said Mella Frewen, the FoodDrinkEurope Director General on 23 March 2020. In just one sentence, she highlighted the key role of the food and drink industry in Europeans' daily lives and raised issues caused by the Covid-19 pandemic: breaks in supply chains, bottlenecks and delays to transport at borders, and disruption to international trade.

FoodDrinkEurope represents not only national food and drink federations, but also many European sector associations (including European associations for fruit juice, chocolate, sugar, meat, coffee, bottled water, snacks, spices and pet food) and well-known multinational food and drink companies. In all, it represents some 294 000 businesses. One of the main features of the sector is its market power: it purchases 70% of the EU's manufacturing and agricultural output and is 'Europe's largest manufacturing industry'.⁵⁸ European social dialogue in the sector is through EFFAT (European Federation of Trade Unions in the Food, Agriculture and Tourism sectors), which is the voice of 2.6 million affiliates representing 120 national trade unions in 35 European countries. In addition to its affiliates, EFFAT defends the interests of more than 22 million workers across the entire food chain.

⁵⁸. <https://www.fooddrinkurope.eu/about-us/role-and-mission>

At end-March 2020, in view of the worsening epidemic in Europe and worldwide as well as given the increasingly tangible prospect of a major global economic recession, FoodDrinkEurope and EFFAT adopted an initial joint text calling on European and national authorities to take urgent measures. In the statement, which was adopted on 25 March 2020, the social partners welcome the measures already taken by the EU, in particular the suspension of the Stability and Growth Pact (SGP) and the establishment of a 'Corona Investment Plan' (CRII), but highlight the need for additional actions in four areas:

1. All EU Member States must recognise the key role played by workers in the sector. In order to enable these workers to continue to work, and therefore ensure continuity of the food chain, the social partners say governments must provide support measures such as childcare and, where necessary, wage compensation if workers are temporarily suspended from work.
2. The establishment of centralised purchasing systems for personal protective safety equipment must be fast-tracked to help companies operating in the food and drink sectors procure personal protective equipment for workers.
3. The Commission is urged to provide EU guidelines to Member States to establish harmonised protocols that will allow food sector workers to continue their work safely.
4. Support must be provided to workers and businesses in the sector, 99% of which are SMEs. Welcome measures have already been taken on state aid, but emergency measures must be developed for the food sector in order to maintain businesses' viability and protect jobs. For example, unused structural and other EU funds should be used to help the Member States to provide financial support and income support for workers affected by unemployment, including non-standard workers and workers employed in the subcontracting chains.

The second 'Covid' text signed in 2020 by the social partners in the food and drink industry (Guidelines to protect the health and safety of workers in food business[es] during the Covid-19 pandemic) is addressed to all European businesses in the sector. It encourages them to set up a crisis taskforce and to establish a continuity plan to ensure their staff are protected and their activities maintained, while reaffirming that social dialogue and the involvement of health and safety representatives are to be particularly encouraged. The text sets out a series of very detailed guidelines (summarised here) in the following areas:

- hygiene, health protection and information for employees on the pandemic situation, risks, behavioural rules, hygiene practices, availability of disinfectants, etc.;
- ways of working: implementation of social distancing, staggered work hours to prevent people gathering, use of protective masks, installation of Plexiglas, home working for workers in all departments other than production, logistics and distribution, secure access points, adjustments in canteens and to break schedules, etc.;
- management of employee sickness: reporting of any physical symptoms before or during work (applies also to temporary, seasonal and posted

- workers⁵⁹), reporting of contacts, encouragement to measure employee temperature at the entrance to the workplace, measures to be taken in respect of an individual who has strong symptoms associated with Covid-19 (send home, send to hospital, self-isolation, etc.) and additional measures for workers who are over 65 or at risk, including pregnant workers;
- transport: compliance with health rules by drivers and suppliers, ban on access to offices, authorisation to access washrooms external to the offices;
 - travel to and from work: facilitate arrangements for safe travel; transport organised by a business must comply with social distancing rules.

The social partners undertake to disseminate and promote the guidelines among their respective members and call on the Commission to assist them in that regard. The recommendations will be in force throughout the pandemic, and the social partners undertake to assess their implementation during and at the end of the health emergency.

Table 14 Food and drink industry – two joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
25/03/2020	<i>Food and drink trade unions and industry call for worker support</i>	Provide support measures to ensure continuity of the food chain; establish harmonised protocols.	Provide businesses with protective safety equipment by moving to centralised procurement systems.	Provide for medium-term measures, including financial measures, in order to maintain businesses' viability and safeguard jobs.
09/04/2020	<i>Guidelines to protect the health and safety of workers in food business[es] during the Covid-19 pandemic</i>	Provide businesses with detailed guidelines on health protection, ways of working, managing Covid cases, transport, and travel between home and the workplace.	-	-

Sea fisheries

Europe's fisheries sector provides '48 billion meals every year, enough to feed every citizen in the European Union 96 times'.⁶⁰ So that the 5 million tonnes of fish a year reach consumers' plates, an entire chain of land-based workers also make a living from sea fisheries activity. According to Europêche, one job at sea creates five jobs on land.

However, Brexit-related difficulties and uncertainties concerning European vessels' access to British waters were drastically increased in March 2020 by issues related to Covid-19, namely a ban on crew movement, port closures, collapse in

59. It is interesting to note the social partners' concerns with regard to 'non-core' workers, including in relation to their accommodation: 'Where the employer directly or indirectly provides accommodation for posted and seasonal workers, housing facilities should be of a size that allows for a decent living and recommended social distancing among the occupants. All rooms should be cleaned on a daily basis.'

60. Fishing Industry presentation from Europêche for Charlina Vitcheva – DG MARE Director General, 30 June 2020, <http://europeche.chil.me/download-doc/306775>

seafood products, etc. This was the emergency situation facing the sea fisheries social partners when they wrote to the European authorities in search of solutions that would enable businesses in the sector to continue with their activities.

The social partners represent three industry stakeholders: fishermen, cooperatives and workers. *Europêche* has 16 member organisations from 10 European countries representing 80 000 fishermen in the EU and around 45 000 artisanal and large-scale vessels. *Cogeca* is the General Confederation of Agricultural Cooperatives in the European Union and represents some 40 000 agricultural, forestry and fishery cooperatives employing 660 000 people. The Fisheries Section of the European Transport Workers' Federation (ETF) represents 150 000 women and men working in the European fisheries sector.

a) Social Partners in the fisheries sector urgently call for special regulatory measures and actions to secure the free circulation of fishermen

On 27 March, when measures restricting free movement had already been in place for more than two weeks, the social partners wrote to Ms Veronika Veits, the DG MARE Director at the European Commission, to inform her that the measures had 'become so problematic that many fishing vessels will be forced to stop fishing operations in a matter of days'. The European sea fisheries sector and, therefore, the food it supplies to European citizens risked drying up if urgent measures were not taken.

To prevent this from happening, the signatories called for fisheries to be recognised as a vital sector of the economy and fishermen as key workers, thereby making them eligible to benefit from a number of exemptions including:

- free movement of vessels' crews to end the huge difficulties in performing crew changes (travel to and from fishing vessels and across borders). This would simply involve exempting fishermen from national travel bans or issuing them with specific passes;
- this would have to be supported by enhanced measures to protect fishermen's health. Businesses in the sector had already taken a number of initiatives based on recommendations from United Nations agencies (management of suspected cases, hygiene measures, isolation, medical advice over the radio, reporting and disembarkation of suspected cases at the next port of call, etc.); the fishermen would have to have personal protective equipment and access to medical care on board. The signatories noted that social distancing is difficult to implement on board fishing vessels and that, therefore, the national and European authorities should draw up detailed guidelines and provide assistance for their implementation in order to minimise any risks;
- in view of the above, fishermen may be required for various reasons to spend longer periods on board vessels than specified in their work contract or under applicable national laws. The signatories therefore called on flag and port states to take a pragmatic approach in such situations;
- in such situations, fishermen may be unable to do the necessary training required to extend the validity of their certificates, and therefore their certificates may expire; moreover, some training establishments have

closed for health reasons. On this point, the signatories again called on the authorities to show pragmatism by extending the validity of the certificates by at least three months.

b) Joint letter on repatriation of fisheries crew and change of crew – Covid-19

A second joint letter was sent by the social partners to the Commission on 10 April. In it, they thank the Commission for its response on the free movement of workers and free movement of fishermen, who are deemed key workers. The partners draw further issues to the Commission's attention, this time linked to international fisheries activities. They include: the full cessation of fisheries activity decreed in Namibia, the ban on crew changes (around 20 Spanish vessels were tied up in a Namibian port), the quarantining of replacement crews in hotels in Peru, the closure of fishing ports in Senegal,⁶¹ the impossibility of performing crew changes in Mauritania; the temporary impossibility of repatriating fishermen, and of sending mechanics to third countries to carry out repairs; and the shortages of drugs and protective equipment.

It was clear, the signatories concluded, that, in view of these problems, global action was required to facilitate free international movement of workers. They proposed identifying ports and airports around the world, close to the main fishing areas,⁶² that would agree to regulate crew changes in a pragmatic way, based on the International Maritime Organization (IMO) circular.⁶³ They encouraged the Commission to use its External Action Service (EEAS) to lead a diplomatic initiative to implement this proposal and facilitate access for fishermen to allow crew changes. EU delegations in the third countries should assist European businesses in securing inbound and outbound transport for fishermen. Finally, the social partners called on the national and European authorities to issue certificates based on the vessel tracking records (VMS) as evidence that a vessel had *de facto* been in quarantine due to the amount of time spent at sea before entering port in the coastal state.

c) Fishing Industry welcomes EU support to overcome the socio-economic turmoil caused by the Covid-19 outbreak

A third 'Covid' document was adopted on 17 April 2020 by the sea fisheries sector. It relates to the work then under way in Parliament and the EU Council on the European Maritime and Fisheries Fund (EMFF) and, more specifically, the manner in which the fund could provide emergency aid to the sector in the pandemic. The Commission proposed reallocating part of the fund to mitigate the impact of the coronavirus and allowing aid for those fleets held in port. The Council and Parliament not only approved the measures but also broadened them.

61. The social partners would jointly call for cooperation from the authorities in Senegal and Côte d'Ivoire to cooperate in facilitating crew changes on EU fishing vessels operating in East and West Africa (letter of 23 June 2020).

62. The social partners attached an annex to the letter suggesting about twenty ports around the world that could be selected for that purpose.

63. <https://www.imo.org/en/MediaCentre/HotTopics/Pages/Coronavirus.aspx>

The social partners called on the European institutions to take further measures to allow up to 25% of the unused quota from 2020 to be transferred to 2021. This would offset the loss of income to fishermen who had experienced major price falls. They also called for a European promotional campaign to boost demand for seafood.

Table 15 Sea fisheries – three joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
27/03/2020	<i>'Social Partners in the fisheries sector urgently call for special regulatory measures and actions to secure the free circulation of fishermen' – Covid-19</i>	Adopt exemptions to achieve free movement of fishermen (crew changes).	Set out specific guidelines for the sector to protect fishermen's health and safety in an environment where social distancing is difficult to implement.	Adopt a flexible and pragmatic approach to maximum periods of service on board and to extending the validity of fishermen's certificates.
10/04/2020	<i>Joint letter on repatriation of fisheries crew and change of crew – Covid-19</i>	Take a global approach to tackling the problems in third country ports; identify ports and airports around the world that agree to regulate crew changes.	Call on EU delegations in third countries to assist European businesses in securing inbound and outbound transport for fishermen.	Issue certificates as evidence that the vessel was quarantined before entering port in the coastal state.
17/04/2020	<i>EU support to overcome the socio-economic turmoil caused by the Covid-19 outbreak</i>	Transfer a share of unused quotas from 2020 to 2021.	Organise a European seafood promotion campaign.	-

Banking and insurance

One of the most immediate effects the banking sector faced because of the Covid-19 pandemic related to measures that several countries took from March onwards to defer bill payments for households, the self-employed and businesses facing financial problems as a result of lockdown and business closures. Similarly, insurance companies had to be flexible on payments of premiums for customers in difficulty while maintaining their cover, especially in respect of pensions, invalidity or hospital admissions. The action of the European Central Bank (ECB) was instrumental in increasing banks' lending capacity (less stringent equity requirements, flexibility in prudential supervision), in keeping borrowing affordable (historically low key interest rates) and in supporting access to credit for businesses and households (increase in liquidities that the banks could borrow from the ECB, easing of standards for collateral on loans).⁶⁴ Moreover, to help the economy absorb the shock of the crisis, the ECB launched a 'Pandemic Emergency Purchase Programme' to enable governments, businesses and citizens to access funds they may need to weather the crisis.

Supporting economic activity and helping their customers to the best of their capacity were the two stated priorities of the European banking and insurance social partners. The partners are:

⁶⁴. <https://www.ecb.europa.eu/home/search/coronavirus/html/index.en.html>

- **banks:** the European Banking Federation (EBF and its Committee for European Social Affairs (EBF-BCESA)) is the voice of 32 national banking associations in Europe that together represent some 3 500 banks of all types employing about 2 million people;
- **savings and retail banks:** the European Savings and Retail Banking Group (ESBG) is the voice of some 885 banks which together employ 656 000 people providing services to local communities and support to SMEs in 21 European countries;
- **cooperative banks:** the European Association of Cooperative Banks (EACB) is the voice of 27 member institutions representing 2 700 cooperative banks, 85 million members and 214 million customers;
- **insurance companies:** Insurance Europe is the European insurance and reinsurance federation; it is an umbrella organisation for the national insurance associations in 37 countries, or around 900 000 employees;
- **insurance cooperatives:** the Association of Mutual Insurers and Insurance Cooperatives in Europe (AMICE) has 90 members and represents around 700 insurers through five national associations;
- **insurance intermediaries:** the European Federation of Insurance Intermediaries (BIPAR) is the umbrella organisation for 50 national associations in 30 countries and represents the interests of insurance agents and brokers, and financial intermediaries;
- **workers:** UNI Europa Finance represents finance and insurance workers in Europe, or 1.5 million employees in 108 trade unions.

The joint text adopted on 30 March by the social partners (Joint statement of the European Social Partners in the Banking and Insurance Sectors on the Covid-19 Emergency Crisis) reaffirms their commitment in coordination with public authorities, the European institutions, and the regulatory and supervisory authorities, to try to 'neutralise as much as possible and to the best of our abilities the effects of Covid-19 on the economy'. However, the text places greatest stress on employee and customer health and safety. It notes that businesses in the sector follow health protocols and recommendations strictly, have arranged for the vast majority of their employees to work remotely whenever and wherever possible,⁶⁵ and that all employees who continue in their public-facing roles should be given appropriate protection in terms of both equipment and infrastructure.

The signatories of the joint text also call on their customers to 'show forbearance' when they are requested to limit physical visits to branches and offices, and to use other communications tools (telephone, e mail and other technologies) where possible.

65. As in other sectors, it emerged later that remote working was unlikely to be a merely fleeting arrangement (March, April 2020) but would continue to be necessary in the longer term.

Table 16 Banking and insurance – one joint ‘Covid’ text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
30/03/2020	<i>Joint statement of the European Social Partners in the Banking and Insurance Sectors on the Covid-19 Emergency Crisis</i>	Support economic activity and help customers to the best of their ability.	Ensure the health and safety of employees and customers through compliance with health protocols and ways of working.	-

Audiovisual industry

During the lockdown of spring 2020, the public authorities fairly quickly came to the view that cultural events and performances would have to be cancelled in order to combat the spread of the coronavirus. In the audiovisual sector, this meant the compulsory cancellation of festivals (for films, short films, animated films, etc.), closure of cinemas and the sudden cessation of all cinema and television productions not only in Europe but around the world. The consequences were as devastating as they were serious because festivals are important fishing grounds for funding and concluding coproduction agreements; together with cinemas, they are also sounding boards for publicising the latest releases and less ‘commercial’ productions such as art-house films. Producers’ sales strategies were jeopardised, and thousands of businesses, the bulk of them SMEs, felt the impact of the sudden halt to activity. Films in production encountered cashflow problems as bank payments were sometimes stopped when staff and artists’ wages were due to be paid. Many workers behind and in front of the cameras lost their jobs temporarily or, in the worst case scenario, permanently, because the measures that governments took to help businesses and SMEs took time to implement.

Another significant problem for the sector lay in uncertainty for the future. Those production companies that had not gone bankrupt drained their cash reserves, compromising their ability to invest in developing new projects. Advertising revenue also fell considerably during lockdown, weakening broadcasters’ ability to invest in future projects. Additionally, the impact of the pandemic on the public mood was another source of uncertainty. As Eurocinema noted, ‘in the future it will be hard to sell a project since we have no idea of how the public will react and what will be the market tomorrow’.

It was therefore against a background of great urgency and major uncertainty that the audiovisual social partners wrote to the national and European authorities. The joint text signed on 2 April 2020 (Fighting the global Covid-19 crisis in the film and TV production sector) is addressed to national governments, international and regional organisations and cultural funding bodies. They called on the authorities to take urgent measures to support the sector, its businesses and workers – whether staff, freelance or self-employed (with respect to state aid, taxation and social security), and to take account of the specific needs of the audiovisual sector in economic support plans, especially such plans as implemented by the EU and its Member States.

Social partners in the audiovisual sector

- **Animation:** Animation in Europe federates 17 animation producers associations in 15 countries of the European Union;
- **TV and film producers:**
 - the European Coordination of Independent Producers (CEPI) is the voice of 19 national associations of independent film and television producers representing around 8 000 independent production companies in Europe,
 - Eurocinema is an association of audiovisual and cinematographic producers,
 - the International Federation of Film Producers' Associations (FIAPF) is an umbrella organisation for 34 producers' organisations in 27 countries around the world;
- **Actors:** the International Federation of Actors (FIA) represents performers' trade unions, guilds and professional associations in around 70 countries;
- **Directors:** the Federation of European Film Directors (FERA) represents the interests of film and television directors at European level. It is an umbrella organisation for 47 member associations in 35 countries, or more than 20 000 European directors;
- **Screenwriters:** the Federation of Screenwriters in Europe (FSE) is a network of national and regional associations, guilds and unions of writers for the screen in Europe. It comprises 26 members from 21 countries and represents more than 7 500 screenwriters;
- **Workers, creators and technicians:** UNI Global Union – media, entertainment & arts (UNI MEI) is the voice of 170 unions and national guilds representing over 450 000 creators, technicians and other workers in the media, entertainment and arts sector around the world.

The sector is project-based in nature, and thus its business cycles are irregular. Businesses urgently needed financial support and state aid to cover overheads and prevent bankruptcies; adjustments to be made to tax regimes during the crisis; employers' social security payments to be postponed where necessary; and insurance coverage for shootings that had been interrupted in order to comply with Covid-related health measures. Businesses in the sector also called for funding to be made available to drive a revival in production, new project development and distribution post Covid-19.

The workers behind and in front of the cameras also required support. The text's signatories note that, in the audiovisual sector, most cast and crew are either employed on short-term contracts or are engaged as independent contractors, making them particularly vulnerable in a crisis of this magnitude. Hence, in order to retain the workforce and their skills, the social partners called for all workers, regardless of status (including freelancers and the self-employed), to be eligible for the help measures directed at the sector. These included partial unemployment measures, access to social benefits and sick pay – access that must not be prejudiced by temporary loss of employment – and retention of accrued leave entitlements despite containment measures. Finally, the signatories call for the authorities to set up public assistance funds for independent workers to compensate for income lost because of the crisis.

Table 17 Audiovisual – one joint ‘Covid’ text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
02/04/2020	<i>Fighting the global Covid-19 crisis in the film and TV production sector</i>	Protect the viability of businesses in the sector (state aid, taxation and social security measures).	Provide funding mechanisms to revive the sector after the crisis.	Provide workers, regardless of status, with access to various welfare benefits (unemployment, sick pay, etc.).

Travel agencies and tour operators

Since the financial crisis of 2009 that had a serious impact on the sector, the European tourism industry has broken one record after another. In 2019, it accounted for 745 million arrivals, or 50% of the world market (1.5 billion arrivals).⁶⁶ However, the Covid-19 pandemic put a sudden stop both to recreational tourism and business travel from March 2020. As a result of travel bans, Covid-related health requirements and short- and medium-term uncertainties, the EU lost 62% of its tourists in March, 95% in April and 88% in May, according to data published by Eurostat on 30 July 2020.⁶⁷ In countries such as Cyprus, Slovenia or Spain, tourist accommodation arrivals in April fell to 0%. The net bed and hotel-room occupancy rate barely scraped 1% in Austria and hovered around 3% in Croatia and 4% in Italy and Malta. Demand began to pick up in June, when border restrictions were gradually lifted; however, the situation was extremely difficult for the travel business because confidence among the travelling public was at a historic low, to say nothing of the total absence of coordination in national approaches to lifting restrictions or a fragmented, changing Europe.

In April 2020, in view of mass travel cancellations and border closures that were likely to lead in short measure to insolvency for thousands of tour operators and travel agencies, the sectoral social partners made an appeal to the authorities. The European Travel Agents’ and Tour Operators’ Associations (ECTAA) represents around 70 000 travel agents and tour operators in 27 EU Member States, Switzerland and Norway. The European trade union federation that represents service sector workers in the tourism industry is UNI Europa, which represents 272 national unions in 50 countries.

In their joint statement of 3 April 2020 (Emergency measures are needed to overcome the economic and social impact of Covid-19 pandemic on travel agents’ and tour operators’ community), the ECTAA and UNI Europa called on the European institutions and Member States to ‘help workers, enterprises, economic activities to survive the crisis, to be able to come back to their activities when the crisis ends, to keep workers in their jobs meanwhile, to protect from unemployment and loss of income, to alleviate financial losses and to prevent speculative phenomena leading to a consolidation of the market detrimental to SMEs’.

⁶⁶. <https://www.europarl.europa.eu/factsheets/en/sheet/126/tourism>

⁶⁷. Agence Europe, 4 August 2020.

In particular, the signatories stress the need to provide access to bank credit and support for businesses and SMEs, and to establish a legal and financial framework that would allow the Member States to provide financial aid and income support to workers, including the self-employed, who are affected by unemployment or suspension from work. They call on the Commission and the Member States to establish an emergency fund to help businesses cover loss of income and comply with their obligations to their employees, customers and suppliers. Finally, the social partners urge the Member States to involve the national social partners in designing and implementing national economic recovery measures.

Table 18 Travel agencies – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
03/04/2020	<i>Emergency measures are needed to overcome the economic and social impact of Covid-19 pandemic on travel agents' and tour operators' community</i>	Ensure access to bank credit and financial support for businesses and SMEs.	Provide income support to workers, including the self-employed, who are affected by unemployment.	Establish an emergency fund to help businesses cover loss of income and comply with their obligations.

Telecommunications

‘The European Union is preparing for the era of widespread and very high-speed connectivity which will bring next-generation technologies such as 5G’ announces the EU Council on its telecommunications webpage.⁶⁸ There is barely any need to explain why, of all the sectors considered in this paper, telecommunications is the first sector to emerge as a ‘winner’ from the Covid-19 crisis. During the first lockdown in spring 2020, employees were urged to work from home, meetings became videocalls using various online platforms (Zoom, Teams, Skype, etc.), educational establishments scrambled *en masse* to take up online tools, and a growing number of people who were isolated at home made use of online opportunities for recreation, entertainment and shopping. In a matter of days, telecommunications and broadband became the essential infrastructure of the economic and social fabric of our societies, whether for work, education, industrial relations, leisure, commerce or shopping. The sectoral social partners sought to underscore this role: the European Telecommunications Networks Operators’ Association (ETNO) has 40 members and is the voice of Europe’s telecommunications and electronic communications network operators; UNI Europa ICTS is the European trade union federation that represents workers in the telecommunications sector.

In their joint statement of 7 April 2020 (Statement of the Social Partners in the European Telecom Sector on the Covid-19 Emergency), the European telecommunications social partners state that they ‘are fully committed to sustaining and supporting the European society and economy during this global pandemic’. Highlighting the importance of telecommunications infrastructure

68. <https://www.consilium.europa.eu/en/policies/eu-telecoms-reform/>

during this time when physical separation and isolation at home had become a reality in the EU, they state their support for all government measures to ensure that economic stakeholders are able to continue with their activities despite the crisis. They naturally also support any initiative on the part of the European and national authorities to promote investment in telecommunications networks, which are the ‘backbone of our communities’.

Moving on to the health and safety of telecommunications workers, the signatories note the new online ways of working that make it possible to continue to offer assistance to the public while minimising potential exposure to the virus, and protective equipment when telecoms workers have to be physically present. Telecommunications businesses have made extensive use of home working, and in future the signatories undertake to maximise the environmental, commercial and work-life balance benefits of the new ways of working that have been learned during the emergency (we note here that, in another joint text of 19 May 2020, not selected for this paper, the telecommunications social partners complain of the harassment experienced by employees over 5G, which some rumours blame for the pandemic). Finally, they call on governments and EU institutions to support wages and employment in the sector.

Table 19 Telecommunications – one joint ‘Covid’ text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
07/04/2020	<i>Statement of the Social Partners in the European Telecom Sector on the Covid-19 Emergency</i>	Ensure continuance of economic activity using telecommunications infrastructure.	Promote investment in infrastructure.	Provide health protection for workers and the public, and implement new ways of working.

Commerce

Wholesale and retail commerce has an important place in industrialised countries’ economies. On average, it employs 1 in 12 workers and accounts for almost 5% of GDP in OECD countries.⁶⁹ It plays a key role in value chains as an outlet for upstream sectors and as a provider to households (downstream). In Europe, it links producers to 450 million consumers more than one billion times a day and employs close to 30 million Europeans, according to figures from EuroCommerce. The sector is very labour-intensive and also relies heavily on low-wage, part-time jobs and gig-economy and self-employed workers who are not covered well by traditional social protection measures. This makes them more vulnerable to the social consequences of the crisis in this sector.

The coronavirus crisis and the emergency measures taken to counter the pandemic were naturally a major shock to the sector, but the consequences differed widely depending on the type of shop involved, the products sold (whether essential or

69. <http://www.oecd.org/coronavirus/policy-responses/le-Covid-19-et-le-secteur-du-commerce-de-detail-impact-et-mesures-de-politique-publique-affc2e6b>

not), size (small or large) and sales method (in-store, online or a mixture). During the lockdown and curfew periods of 2020 and 2021, the authorities had to strike a balance that secured continuity of the food supply, which is vital to the public, while combating the spread of the pandemic. This was reflected in decisions to open and close as the pandemic developed, hygiene and safety rules for staff and customers, the requirement to implement social distancing measures, etc.

In 2020, the European social partners in the sector adopted two joint texts on Covid-19, one underlining the impact of the crisis on the sector and the measures to be taken at national and European level, and the other proposing the establishment of 'A European Pact for Commerce'. The social partners are EuroCommerce, which is the voice of national associations in 31 countries and 5.4 million businesses, both large and small; and UNI Europa, which represents 7 million workers in the services sector, including commerce.

a) Joint statement EuroCommerce/UNI Europa on the impact of Covid-19 in the retail and wholesale sector

In this first joint text, adopted on 8 April 2020, the signatories underline the climate of uncertainty in the non-food sector, and the risk of bankruptcy for the businesses forced to close their doors because of measures to combat the virus. The social partners underline their members' commitment to comply with safety measures, physical distancing between customers and staff, to provide disinfectants and safety infrastructure in their shops, and to train staff in hygiene techniques. They also reminded their members of the guidelines adopted in 2010 on tackling violence and harassment related to work:⁷⁰ in many shops, the first lockdown in spring 2020 led to violence and verbal abuse from customers panic-buying or upset at safety measures (waiting to enter or leave stores, etc.). Shop managers and workers were on the front line dealing with this violence.

In addition to the above, the European social partners call on the European and national authorities to provide bridging finance to enable businesses to continue to pay their staff and prevent a wave of bankruptcies, particularly among non-food operators. They call for financial support for workers in the event of illness, suspected infection or time off to look after a relative. In respect of 'non-food' staff, the signatories call for assistance to alleviate the situation of workers subject to temporary unemployment, and for support in training workers while their shops are shut to improve their digital skills. They call on the Commission to release EU funds urgently from initiatives such as ESF+. Training in digital technology should help SME retailers to supplement their physical shops with an online presence.

In order to protect food supply chains, the social partners are of the view that staff in the retail and wholesale food subsector should be classed as essential workers and given help if schools and childcare facilities are closed; in frontier regions, they should be allowed to cross borders freely to get to work. Similarly, lorries

⁷⁰. Multi-sectoral guidelines to tackle third-party violence and harassment related to work, 30 September 2010.

carrying food should be fast-tracked across EU internal borders, so as to avoid the significant delays which have occurred since lockdown was imposed. They must also ensure the safety of lorry drivers and make sure that they are not prevented from returning to their home country after delivering goods.

Finally, the social partners undertake to draw up a crisis exit strategy, including the use of strict health protocols allowing non-food shops gradually to reopen safely. Social dialogue, the signatories note, provides the most effective framework at all levels for finding solutions to the crisis, and achieving the buy-in that exceptional measures require.

b) The social dimension of A European Pact for Commerce: Recovery priorities for the retail and wholesale ecosystem

A second joint text on Covid-19 was adopted by the social partners in the sector on 16 October. They welcome the fact that they have been able ‘to deal effectively with the sudden and radical adaptation to the “new normal”’. In the statement, they propose that the European and national authorities should enter into ‘A European Pact for Commerce’. The aim would be to improve the sector’s resilience through targeted support measures and by fast-tracking the digital and green transitions as part of Member States’ recovery programmes and under the EU’s overarching priorities.

There are several challenges to be addressed, linked not only to the pandemic but also to automation and the transition to a digital economy. Citing a report by the McKinsey Global Institute, the signatories are concerned that more than 5 million jobs in retail and wholesale are at risk of disappearing. They regard stronger vocational training, particularly in the use of digital technologies, as the best way of retaining a large share of their workforce, and improving the employability of those who lose their jobs. This requires a re-design of employment and skills support measures. Therefore, they call on the European and national authorities to incorporate four ‘asks’ into the ‘Pact’ for commerce:

1. The Commission should foster coordination and discussion on vocational education and training (VET) and life-long learning among Member States. In addition to interpersonal skills, retailers and wholesalers now need to equip their workforce with the skills needed to interact with systems using blockchain and artificial intelligence.
2. The Commission needs to help SMEs train and reskill their workforce. Basic digital skills programmes are essential to employees’ employability, in particular for older and less-skilled personnel. Private-sector training programmes should be co-financed by the ESF+.
3. Member States need to reform their national education and training systems to address the shortfall in advanced digital skills. These skills are needed to support the digitalisation of retail and wholesale. The introduction of new curricula based on ‘digital job profiles’ (e.g. online retailer) should be encouraged.
4. The European and national authorities should support the social partners’ initiatives on VET and life-long learning. Social partners design many

initiatives, such as the e-commerce merchant apprenticeship devised by Austrian and German social partners in retail and wholesale commerce. The authorities should support these initiatives, which add value to businesses and increase employees' employability.

It is clear from the above that the social partners are attempting to turn the crisis into an opportunity to fast-track digitalisation of the commerce sector.

Table 20 Commerce – two joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
08/04/2020	<i>Joint statement EuroCommerce/UNI Europa on the impact of Covid-19 in the retail and wholesale sector</i>	Ensure the continuity of the food supply chain by establishing safety measures for staff and customers in essential shops.	Provide assistance to 'non-essential' shops and temporarily unemployed workers and train them in digital skills.	Ensure drivers' safety, free movement of lorries carrying food.
16/10/2020	<i>The social dimension of A European Pact for Commerce: Recovery priorities for the retail and wholesale ecosystem</i>	'European Pact for Commerce': strengthen vocational training and life-long learning in order to support digitalisation of the sector.	-	-

Construction

In 2019, the construction sector represented around 3 million businesses in Europe and employed close to 13 million workers. The sector chiefly comprises SMEs employing fewer than 20 workers (especially in southern Europe), along with a few large international businesses. Construction is estimated to generate more than 14 million indirect jobs. The economic shock unleashed by the pandemic and the containment measures taken in March and April 2020, i.e. restrictions on movement and private gatherings, cancellation of public events, closure of schools, bars, restaurants, hotels and shops, was very hard on the construction sector, where many sites experienced disruption, especially in Italy (70% drop in activity), France (65.2%) and Luxembourg (55.4%). Between February and April 2020, the construction index fell by more than 33 points in the euro area, and by nearly 29 points in the EU27. '[D]uring the first wave of the Covid-19 crisis, the construction index lost about as much as during the five years in the aftermath of the economic and financial crisis,' the European Commission notes.⁷¹

After the first measures easing the restrictions, however, namely May and June 2020, the sector rapidly recovered back to (almost) normal. In December 2020, the level of construction activity in the EU was around 95% of what it had been in February. In some countries, the ILO notes, the rapid construction of emergency facilities and hospitals was crucial, for example in Italy and China.⁷² This did not

71. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Impact_of_Covid-19_crisis_on_construction#Development_by_country

72. https://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---sector/documents/briefingnote/wcms_767303.pdf

prevent the sector from having to find urgent solutions to liquidity problems, disruption to supply chains, labour problems, etc.

The European construction sector adopted two joint texts on Covid-19 in 2020: the first, signed by the European Construction Industry Federation (FIEC, an umbrella organisation for 33 national federations representing construction businesses from SMEs to international businesses) and the European Federation of Building and Woodworkers (EFBWW, an umbrella organisation for 76 trade unions in 34 countries representing 2 million members), sets out in great detail the issues faced by the sector and makes recommendations to the authorities that would enable it to overcome its difficulties.

The second text is again signed by these two organisations, as well as five others representing construction products, owners, energy efficiency, etc. with a view to preparing the sector's contribution to economic recovery plans both at EU and national levels.

a) EFBWW and FIEC joint recommendations to counteract the negative impact and consequences of the current Covid-19 crisis for the construction industry

In this first text, adopted on 21 April 2020, the social partners stress first the need for their members to comply with health guidelines to ensure a safe and healthy work environment; the need to keep borders open to ensure mobility of workers and prevent disruption to supply chains for construction materials; and the importance of social dialogue in businesses when establishing health measures and of negotiations between national organisations and public authorities when seeking solutions that would enable construction activity to continue.

The signatories then address a series of recommendations to the authorities and their members that will establish the conditions required for a recovery of activity in the sector. They call on the public authorities to pay immediately any outstanding invoices to contractors; temporarily suspend the recovery of debts; provide financial support to businesses forced to stop their commercial activities; promote solutions to temporary unemployment; limit administrative delays; and establish swift procedures to support construction companies and workers. The signatories also stress the need to maintain the mobility of frontier and posted workers, and to lift travel restrictions and compulsory quarantine for asymptomatic workers working on critical infrastructure projects.

Turning next to their national affiliates, the EFBWW and FIEC recommend them 'to take the current Covid-19 threat very seriously and take all precautions needed which simultaneously guarantee the sustainability and viability of the construction companies, while securing income, social protection, well-being and health of their construction workers'. This relates more specifically to health protocols, particular ways of working, temporary unemployment measures or other alternative measures to ensure that workers who are not entitled to temporary unemployment benefits do not fall into the poverty trap. The signatories also list requirements on the provision of information and instructions in health and safety matters, preventive and protective measures, compliance with safe distancing (in

the workplace, workers' transport and shared accommodation), specific measures for posted or migrant workers, including, where necessary, their safe return to their country of origin.

Finally, in order to ensure a coordinated resumption of construction activity in Europe, the social partners call on the Commission to publish guidelines on preventive measures, e.g. risk assessments and prevention plans.

b) Appeal by the construction industry for a rapid and sustainable recovery

In addition to FIEC and the EFBWW, the second document is signed by five other organisations in the construction sector: EBC (European Builders Confederation), Construction Products Europe, Housing Europe, UIPI (International Union of Property Owners) and EuroACE (EU Alliance of companies for energy efficiency in buildings). Signed on 16 June 2020, the document focuses on the sector's contribution to economic recovery; we note that construction has very significant job creation potential because it is highly labour-intensive and has links with other economic sectors.⁷³ The signatories strategically stress the sector's central role in the climate transition (energy efficiency and reduction in greenhouse gas emissions). '[W]ithout the construction sector the European Union cannot respond to its main challenges in terms of competitiveness, youth unemployment, digital economy, energy efficiency and energy poverty, circular economy, affordable housing, climate change, clean mobility and connected infrastructure etc.'

The signatories stress that stimulating construction activities needs to be at the heart of economic recovery plans, including through 'Next Generation EU', the new instrument proposed by the Commission and its tight linkage to the objectives of the European Green Deal. They would like to see a policy framework and fast-track procedures put in place to ensure that funding under the plan makes for a rapid and sustainable recovery by facilitating public and private investment. Such investment should indeed focus on the sustainable renovation of the building stock in Europe and the maintenance of existing infrastructure, but it should also focus on the construction of new climate-proof and resilient infrastructure and buildings. Interestingly, the signatories are of the view that '[t]his will require flexible fiscal and budgetary rules at EU and national level to allow public authorities to be the driver of such investment programmes', which will contribute to the success of the climate and digital transitions. The social partners underline that their own involvement at European and national levels is necessary in order to implement the recovery plans. Finally, they note the investment required in training programmes to re-skill or upskill workers in the sector.

73. https://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---sector/documents/briefingnote/wcms_767303.pdf

Table 21 Construction – two joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
21/04/2020	<i>EFBWW and FIEC joint recommendations to counteract the negative impact and consequences of the current Covid-19 crisis for the construction industry</i>	Call on the public authorities to pay any outstanding invoices; suspend the recovery of debts; provide financial support to businesses; promote temporary unemployment; maintain the mobility of frontier and posted workers.	Ensure businesses' viability and worker's income; provide social and health protection for workers (health protocol, ways of working, temporary unemployment, etc.).	Call on the Commission to publish guidelines on risk assessments and prevention plans.
16/06/2020	<i>Appeal by the construction industry for a rapid and sustainable recovery</i>	Place construction activities at the heart of economic recovery plans: facilitate investment in the climate transition (renovation, infrastructure, etc.).	Involve the social partners in implementing recovery plans.	Invest in training for workers.

Industrial cleaning

The industrial cleaning sector includes activities such as cleaning the interiors of buildings such as offices, factories, shops, institutions, houses and flats, as well as some types of specialist cleaning (industrial machinery, disinfection and pest control in buildings and industrial facilities, etc.). In Europe, this sector represents more than 283 000 businesses employing 4.1 million people. Obviously, one of the direct effects of the pandemic was to highlight the importance of the role of the cleaning industry and its staff in preventing the spread of the virus. Whether in hospitals, care homes for older people, essential buildings and infrastructure, offices, factories or retail space, cleaning, disinfection and sanitising helps to ensure that hygiene and cleanliness are maintained.

However, as the sectoral social partners noted early on, businesses and workers have been in a double bind since March 2020: on the one hand, building closures as the result of containment measures ran the increased risk of undermining businesses in the sector and seeing some of their staff lose their jobs; on the other hand, the pandemic has led to much more stringent hygiene rules and specialist disinfection and sanitising measures that require businesses and their staff to make adjustments and receive training. In order to address this complex situation, the social partners in the sector adopted a joint text signed by the EFCI (European Cleaning and Facility Services Industry), representing 14 national associations, and UNI Europa, representing 7 million service workers, including in the industrial cleaning sector.

The text signed on 22 April 2020 (Joint Statement on the Covid-19 impact on the Industrial Cleaning and Facility Services sector and the necessary measures to protect it) notes not without some satisfaction the recognition and even 'praise' that cleaning staff are receiving during the pandemic. Although cleaners often work in the shadows in dangerous and difficult conditions, and are often given little consideration by the public authorities, Covid-19 has shed light on the work that cleaning staff (usually women) do to protect public health.

In order to help the sector overcome the negative economic consequences of the pandemic and contribute to a safe phasing-out of containment measures, the signatories call on the national and European public authorities to recognise cleaning and disinfection work as an essential activity and provide workers with any necessary personal protective equipment while ensuring their freedom of movement and access to childcare services during lockdowns.

The social partners also call for measures to safeguard job and income security so that cleaning activities can resume unhindered during a gradual phase-out of containment measures. The assistance could take the form of public institutions upholding their contracts with cleaning services suppliers and assuming the labour costs associated with suspended contracts.

They also recommend applying the principles set out in the 'Selecting Best Value' guide⁷⁴ developed jointly under European social dialogue, which sets out the principles that underpin high social standards as well as service quality when selecting cleaning services.

Table 22 Industrial cleaning – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
22/04/2020	<i>Joint Statement on the Covid-19 impact on the Industrial Cleaning and Facility Services sector and the necessary measures to protect it</i>	Recognise cleaning as an essential activity during the pandemic and provide workers with necessary protective equipment.	Ensure cleaning staff have free movement and access to childcare services.	Support businesses by upholding contracts with suppliers and assuming the labour costs of suspended contracts.

Woodworking and furniture

The woodworking and furniture sectors cover several different stakeholders: the timber industry, the furniture and manufacturing industries, sawmills, particle board manufacturers and a well-known furniture multinational. Together, they account for 1.7% of EU GDP and employ more than 2 million workers, making the industry the European Union's fifth largest manufacturing sector in employment terms. The chief impact of the pandemic on the sector has been from containment measures, travel restrictions and the slow-down or cessation of economic activity depending on country and region. Although the sector was heavily reliant on others such as construction or commerce, that were also very hard hit by the spring 2020 lockdown, it has also experienced some spill-over effects of the crisis. The sectoral social partners adopted a joint text on Covid-19 setting out many detailed recommendations.

In their joint statement of 24 April on Covid-19 (Covid-19: To fight the Corona pandemic, the European Woodworking and Furniture Industries propose measures to protect workers' health, support economic activity and the sector's

74. Guide adopted on 8 March 2016: UNI-Europa and FENI (2016).

recovery), the social partners make many detailed recommendations not only to their members, the national, regional and local social partners in the woodworking and furniture industries, and businesses in the sector, but also to the national, regional and local public authorities and the EU institutions.

Social partners in the woodworking and furniture industries

- **National and European organisations:** the European Confederation of Woodworking Industries (CEI-Bois) is an umbrella organisation for 21 organisations in the woodworking sector in 15 EU countries representing close to 180 000 businesses and 1 million workers.
- **The furniture industry:** the European Furniture Industries Confederation (EFIC) represents 16 national associations and one individual company member in the furniture industry in Europe. The furniture industry employs some 1 million people in around 120 000 businesses.
- **Furniture manufacturers:** the European Furniture Manufacturers Federation (UEA) represents European employers and national furniture organisations in six countries: the Czech Republic, Portugal, Romania, Spain, Turkey and the United Kingdom.
- **Panel manufacturers:** the European Panel Federation (EPF) represents over 5 000 businesses manufacturing particleboard, MDF, OSB, hardboard, softboard and plywood in 25 countries. The European panel industry employs over 100 000 workers in Europe.
- **Sawmills:** the European Organisation of the Sawmill Industry (EOS) represents some 35 000 sawmills employing 250 000 people to manufacture sawn boards, timber frames, glulam, decking, flooring, joinery, fencing, etc.
- **Workers in the woodworking, furniture and allied sectors:** the European Federation of Building and Woodworkers (EFBWW) is an umbrella organisation for 76 national trade unions in 34 countries, representing members in the building, building materials, woodworking, furniture, forestry and allied sectors.

They recommend that their members and the social partners should focus on health protection and on establishing a safe working environment for contractors, workers, owners and society. They stress the importance of working with public authorities at all levels to keep businesses running to the extent possible, protect workers against the risk of losing their jobs or incomes, and to keep borders open for goods provided that public health is protected.

The signatories recognise the political responsibility on the public authorities' shoulders in this situation but call on them to identify essential activities that could continue after a careful risk-assessment and with specific preventive measures in place. The signatories recall the importance of their industries for climate transition and rural development; and stress the role that the sector plays and will play post-crisis in achieving a circular economy, the objectives of the Green Deal and the strategy now being developed by the European Commission for a 'Renovation Wave'.⁷⁵

75. https://ec.europa.eu/energy/sites/ener/files/eu_renovation_wave_strategy.pdf

With a view to finding a way out of the crisis and effecting climate transition, the social partners call for financial support for businesses in the sector that have been forced to halt or sharply curtail their economic activity, including protection from creditors. This means in particular: authorising extended recourse to temporary unemployment, providing information and safety equipment, providing for an emergency legal framework to ensure businesses' survival, and encouraging work to upskill and retrain workers to support economic recovery.

The signatories urge their national members to comply strictly with health measures in order to facilitate the relaxation of containment measures. This means providing information, advice and training to workers; involving their representatives in organising measures at company level; providing the protective equipment required; providing the facilities necessary to maintain the required level of hygiene in the workplace; enforcing protocols and ensuring safe distancing between workers. The signatories also stress the importance of implementing all these measures for posted workers as well, whether in the workplace, during breaks, on workers' transport or in shared accommodation, etc. As in the construction sector, the woodworking and furniture social partners call on businesses to provide where necessary for procedures to allow posted workers to return home safely.

Drawing on the food sector as an example, they note that commercial activities can be performed in compliance with strict hygiene rules and restrictions on the number of customers in sales areas. Finally, in the event that activities are halted by *force majeure*, the social partners call for income guarantees for workers (temporary unemployment) and businesses (assistance funds to maintain liquidity, and public procurement geared to low-carbon timber construction to prop up demand). Finally, in the context of judicious solidarity, the woodworking and furniture sectors also call for support for construction, since it is one of the pillars of the economy and a very important partner for the woodworking industries.

Table 23 Woodworking and furniture – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
24/04/2020	<i>Covid-19: To fight the Corona pandemic, the European Woodworking and Furniture Industries propose measures to protect workers' health, support economic activity and the sector's recovery</i>	Keep businesses running by focusing on compliance with health protocols, and measures to protect workers and customers.	Support businesses in the sector (liquidity, protection against creditors, etc.) with a view to finding a way out of the crisis and achieving climate transition.	In the event that activities are halted, ensure access to temporary unemployment and assistance funds for businesses to prevent bankruptcies; launch public procurement tenders to prop up demand.

Temporary agency work

The temporary agency work sector is highly labour-intensive and employs millions of workers worldwide. Levels of activity are directly linked to changes in GDP. There is barely any need to explain why the pandemic and the measures taken by public authorities the world over to contain it were an unprecedented shock to activities in the sector. With national economies at a standstill, simultaneous

supply and demand shocks generated a contraction in GDP and record job losses. All large businesses experienced sharp falls in turnover:⁷⁶ ManpowerGroup (-28%), Randstad (-25%), Adecco (-29%), Kelly (-29%).

In some countries, the World Employment Confederation (WEC) notes, the Covid-19 crisis reduced the number of temporary agency workers by 50%-70%. In Austria, 92% of agencies reported a fall in the number of workers at end-March compared to the pre-lockdown period; in Denmark, 30% of businesses noted that income had fallen by at least 50% since lockdown. In Sweden, 46% of businesses reported a minimum 50% drop in earnings compared to the same period in the prior year. The crisis of 2020 led to sharper falls in activity by agencies in Europe and the United States than during the global financial crisis of 2008-2009, although the year-end figures were in keeping with a swifter recovery.

The sectoral social partners on the employers' side are the World Employment Confederation-Europe, which is the voice of 30 national federations and six businesses covering a broad range of HR services (temporary agency work, direct recruitment, career management, recruitment outsourcing, etc.), and, on the worker's side, UNI Europa TAW (temporary agency work), which is the umbrella organisation for temporary agency workers in Europe – it seeks to improve their working conditions and ensure equal treatment. They adopted their first text on the consequences of Covid-19 in April 2020; their second was not intended to tie in with the pandemic because it sets out recommendations for new ways of working that were under development before the crisis but acquired special relevance because of the pandemic.

a) Protecting workers in the Covid-19 pandemic, safeguarding work and preparing for an inclusive economic and social recovery (by the TAW EU social partners)

In their joint text adopted on 29 April 2020, the sectoral social partners focused chiefly on health protection for temporary agency workers, and the contribution that temporary work agencies were making to maintaining labour market fluidity during the pandemic. They called on temporary work agencies and user undertakings, i.e. the undertakings using or 'hiring' temporary agency workers, to provide adequate health and safety protection, including medical care, examinations and Covid-19 tests paid for by the employer or the user undertaking before the start of a new assignment. The protection must include clear instructions, health and safety training, and adherence to government measures to prevent the virus from spreading. The social partners remind the agencies of their responsibility in that respect.

The signatories note the role that the sector can play in labour market reallocation in the pandemic: temporary agency workers must be able to 'transit' safely from

76. Year-on-year to the second quarter of 2020; figures from WEC. All the figures in this paragraph were taken from the analysis conducted by WEC into the pandemic's impact on the sector: <https://wecglobal.org/uploads/2021/02/Agency-work-trends-during-Covid-19-1.pdf>

sectors in decline to sectors in urgent need of workers including healthcare, logistics, agriculture and food supply. The temporary agency work sector should be recognised as an essential service to which access is safeguarded.

Shifting their focus now to the national public authorities, the social partners recommend ensuring that all temporary agency workers have access to universal healthcare, and have their income maintained as far as is possible if they are temporarily laid off; if this is not possible, they should have a minimum right to social protection. They call for temporary work agencies to have equal access to government measures and programmes put in place to mitigate the impact of the pandemic, including short-time working schemes.

Finally, the signatories seek to lay the groundwork for the economic recovery. They recommend that, in addition to the operational health and safety aspects, the sector should consider the role of social innovation, along with new ways of working, learning and providing social protection. Access to training and retraining for workers should be encouraged, as should greater sectoral social dialogue. They stress the need for equal access to national and European recovery plans, for reforms to ensure effective access to social protection across diverse forms of work, and for stronger cooperation between public and private employment services.

b) New ways of working, learning and social protection in the temporary agency work sector – Joint Recommendations on Social Innovation as follow-up of a joint EU Sectoral Social Dialogue project

This second text is the follow-up to a project launched under the social dialogue framework prior to the Covid-19 pandemic; however, the fact that it reached its conclusion mid-crisis afforded the social dialogue partners an opportunity to highlight its importance. Adopted on 1 December 2020, the document comprises joint recommendations arrived at following a study on social innovation in the temporary agency work sector,⁷⁷ looking at 15 case studies of social innovation in the areas of training, working conditions and social protection. '[T]he theme of social innovation got even more importance and relevance in the context of the Covid-19 pandemic and its impact on ways of working and learning, but also with regard to ensuring protection of workers', the social partners note.

The 10 resulting recommendations can be summarised as follows:

1. Foster sectoral **social dialogue** and the capacity of sectoral social partners to develop and strengthen social innovation in the temporary agency work industry; the countries where innovation is greatest are those where social dialogue is strong;
2. Establish a framework that allows sectoral social partners to develop and implement **innovative solutions** for working, learning and social protection;

77. https://www.uni-europa.org/wp-content/uploads/2020/12/CEPS-HIVA_Social-Innovation_Final-Edited-version.pdf

3. Strengthen **cooperation** between the temporary agency work industry, policymakers and stakeholders in the areas of training, working conditions and social protection, especially education training providers and institutions responsible for social protection;
4. Facilitate access to **funding** for national social partners at European level through the new European Social Fund and the Next Generation Recovery Fund;
5. Promote the **exchange of** social innovation practices at EU level to foster mutual learning and develop social innovation across Europe;
6. Capitalise on social innovation to drive economic and social recovery during Covid-19;
7. Build on **new technology** (automation, digitalisation and artificial intelligence) when designing social innovation solutions;
8. Foster the development of supplementary **social protection** schemes and draw on existing innovative practices (e.g. facilitating access to mortgages, employment opportunities for people with disabilities);
9. Build on the role played by joint **training** funds in those countries where they exist; take account of lessons learned from providing tailor-made training and learning;
10. Build on the expertise and knowledge gained by sectoral social partners as a result of **different practices** for promoting health and safety at work, preventing accidents at work, fostering labour market integration of people with disabilities and promoting sustainable employment.

Table 24 Temporary agency work – two joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
29/04/2020	<i>Protecting workers in the Covid-19 pandemic, safeguarding work and preparing for an inclusive economic and social recovery</i>	Ensure that agencies and user undertakings protect temporary agency workers' health.	Ensure access to healthcare, support for income levels or a right to social protection.	Lay the groundwork for the economic recovery: access to training and to assistance under recovery plans.
01/12/2020	<i>New ways of working, learning and social protection in the temporary agency work sector</i>	Promote social innovation in the areas of social protection, training and working conditions.	-	-

Private security

The private security sector encompasses a series of activities which, by definition, are not categorised under public security (e.g. police, inspection and intervention forces). The sector contributes to crime prevention through providing services involving guarding, surveillance, protection of property and persons and security, including for valuable cargo.

During the pandemic, the private security sector has been in almost the same strange situation as the industrial cleaning sector (see above): on the one hand, Covid-19 demonstrated the usefulness of the sector's activities, enabling controlled access to supermarkets, care homes, protection for hospitals and critical infrastructure,

monitoring of public transport stops, and the implementation of public health and safety measures. Yet, on the other hand, the sector has been seriously affected by closures of buildings, offices, governmental and European institutions, the decline in air traffic and event cancellations.

In some countries, commercial activity fell by 25%-30% compared to the prior financial year because of measures to contain the virus taken by the EU Member States. One subsector of the private security industry, cash management, has also been severely impacted by the Covid-19 crisis because of consumers' fears that cash may spread the coronavirus. The increasingly widespread use of card and contactless payments in shops has had a significant impact on the activities of cash management services.

The private security social partners adopted two joint statements on the Covid-19 crisis in 2020. One relates to a way out from the 'paradoxical' situation described previously; the other relates more specifically to cash management services.

The social partners for the employers are the Confederation of European Security Services (CoESS), which represents 2 million guards and more than 45 000 private security businesses in 21 European countries; for the workers, it is UNI Europa, which represents more than 7 million workers, including those in the private security sector, in 50 different countries. Where cash management is concerned more specifically, social dialogue also involves the European Cash Management Companies Association (ESTA) which has 124 members and represents around 100 000 people in Europe working for businesses and organisations engaged in the transportation or management of cash or in supplying equipment and services to that end.

a) Joint Declaration – Ensuring business continuity and protection of workers in the Covid-19 pandemic

The first joint document on the crisis was signed on 8 May 2020 by CoESS and UNI Europa. From the outset, it notes that private security services and their staff are essential to the operation of the European economy during the pandemic because of the role they play in protecting public health systems, supply chains, infrastructure and institutions. Happily, their role has been recognised as essential by the European Commission⁷⁸ and several European governments, a fact welcomed by the signatories, as it will ensure business continuity in the sector as well as providing health protection for workers.

However, the forced reduction in commercial activity because of the closure of many buildings poses urgent liquidity problems for businesses, especially those specialising in particular segments such as aviation and event security. Therefore, the signatories address seven recommendations to the national and European authorities.

78. European Commission (2020a).

1. **Better recognition** of the profession. The signatories call on the authorities of the Member States to provide private security workers and businesses with the specific support they need, including, for example, childcare for workers during lockdown.
2. Access to **personal protective equipment** (PPE). In view of the challenges in procuring sufficient PPE, the competent authorities should help businesses with supplies, information on using the equipment, the funding of additional costs and training in health protocols.
3. **Financial and administrative support**. Easily accessible, quickly available financial support should be provided to improve working conditions, pay, and health and safety standards in the industry; it is important to retain workers and ensure the sustainability of businesses.
4. **Best value procurement**. When Member States gradually lift the emergency measures, the recognition the sector has received must be reflected in terms of best value procurement that meets certain quality criteria. CoESS and UNI Europa call on public and private purchasers of security services to apply the social and quality procurement criteria set out in the Best Value Guide.⁷⁹
5. Abolish **unfair practices** by purchasers in both the public and private sectors. This refers to the unilateral scaling-down or suspension of services without bridging agreements, the extension or suspension of payment terms, or forcing contractors to lower rates at the expense of quality and to the detriment of collective agreements. Today more than ever, note the signatories, ‘buyers who incentivise unfair competition are a danger to occupational health, public safety and economic recovery’.
6. Removal of **barriers to the redeployment** of workers. Although some service segments are at a standstill, others are in growing demand (hospitals, retail, banking, government, offices, etc.) or will be when restrictions are eased subject to additional safety measures (schools, universities, transport, horeca, tourism). It is therefore necessary to facilitate the rapid redeployment of workers in the sector and find solutions for training staff.
7. Ensure that **cash** continues as a means of payment for all. Governments and central banks should ensure that everyone who wants to pay with cash can do so (see below).

b) Governments must secure the Cash Cycle in times of Covid-19

The second joint text in the private security sector also involves ESTA. Signed on 18 May 2020, the document calls on governments to secure the cash cycle. Covid-19 has been likened to a ‘war on cash’ based on false information. The ECB and WHO have ruled out the possibility that Covid-19 can be spread by cash payments. The signatories say that this war on cash could lead to the end of cash in favour of card payments, which would endanger the entire cash cycle, i.e. production, supply, transportation and distribution.

⁷⁹. www.securebestvalue.org

In addition to the immediate impact on the employment of thousands of workers across private security, financial services, printing, logistics and commerce sectors, the social partners stress the role that cash has in protecting privacy, choice and access to payment for all, and particularly the most vulnerable. They therefore call on the central banks and public authorities to secure the cash cycle. If these jobs disappear, the staff concerned will have to be retrained, or even change career to avoid them swelling the ranks of the unemployed.

Table 25 Private security – two joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
08/05/2020	<i>Ensuring business continuity and protection of workers in the Covid-19 pandemic</i>	Ensure better recognition of the profession; assist businesses and workers specifically to pursue their activities.	Assist in supplying protective equipment, provide financial support, facilitate redeployment of workers.	Apply social and quality procurement criteria in public procurement processes; stamp out unfair contractual practices.
18/05/2020	<i>Governments must secure the Cash Cycle in times of Covid-19</i>	Secure cash payments and support the cash cycle.	Secure the jobs of the workers concerned.	Where necessary, plan for career changes.

Agriculture

Around 39% of the total surface area of the European Union is used as pastureland or cultivated by some 10 million farms.⁸⁰ Since March 2020 when the first containment measures to contain the spread of the virus were introduced, agriculture – a key link in the European food supply chain – has experienced difficulties, including availability of labour, transport of goods, movement of people and disruption to supply and demand. The carriage of agricultural products in Europe ran into difficulties at borders, resulting in delayed deliveries, while travel restrictions caused labour shortages. The food supply chain is highly integrated at European level.

Interruptions or delays to supplies, compounded by the unavailability of workers, caused significant disruption to agricultural activities. Added to this was the fact that the measures to combat Covid-19 were taken in early spring when the summer months were not far off: by nature, farming is subject to the natural cycle; the pace of production peaks during harvest in particular, requiring a highly flexible labour force. Although 9.2 million people work full time on European farms, the total agricultural labour force numbers around 20.5 million. It is estimated that between 800 000 and 1 million seasonal workers are employed each year in the EU, chiefly in agriculture.⁸¹

In order to ensure food supply continuity, there was therefore an urgent need to take measures in respect of the free movement of migrant seasonal workers and transport. The social partners in the sector set about addressing this matter. On the

80. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Farms_and_farmland_in_the_European_Union_-_statistics

81. See European Parliament (2021).

employers' side, the Employers' Group of Professional Agricultural Organisations (Geopa) in the European Union is the voice of 23 national agricultural organisations that are members of the Committee of Professional Agricultural Organisations (Copa), representing more than 22 million European farmers and their families. On the workers' side, EFFAT represents a total of 22 million workers across 120 national trade unions in 35 European countries that are active in the agriculture, sugar, horeca, contract catering, and food and drink sectors.

On 15 May 2020, the agriculture social partners adopted a joint document on the Covid crisis (Joint declaration of the European social partners of agriculture – Geopa-Copa and EFFAT – on the deployment of seasonal workers from European countries in the EU). At the outset, they note that, in the coming summer months, all agricultural subsectors will need to call on healthy seasonal workers. In order for crops to be harvested, workers must therefore be able to cross borders to attend their workplaces in countries where they are not resident. To that end, the social partners set out the conditions under which such travel should occur. These conditions, or guidelines, are directly addressed to the sector's employees. They relate to:

- **recruitment** procedures: establishment of a system of information exchange on temporary labour needs. Employers will contact the potential labour force by telephone or by e mail and provide an employee's certificate and a document attesting to the employment relationship; this will permit free access to the host country;
- health measures at **work**: employers must ensure that national social distancing and health and safety measures are applied;
- health measures in **accommodation**: where employers are responsible for seasonal workers' accommodation, they will ensure that social distancing and other hygiene and safety measures are applied;
- **transportation** from the accommodation to the workplace: where this is provided by the employer, the employer will ensure that, before boarding, all workers have their body temperature taken and that masks, gloves and other hygiene equipment are provided;
- **information** for workers: employers must inform the workers of existing protection measures in a language that they understand;
- **protective equipment**: employers must provide workers, free of charge, with protective equipment (masks, gloves, etc.) and hygiene products (water, soap, detergent and disinfectant);
- **wages** and **social protection**: employers must ensure that seasonal workers' wages are in line with applicable collective agreements or national legislation; they must ensure that seasonal workers are registered and insured in accordance with local social protection legislation and collective agreements;
- **sickness**: in the event of Covid-19 symptoms, employers must immediately contact the competent medical authorities.

Table 26 Agriculture – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
15/05/2020	<i>Joint declaration of the European social partners of agriculture – Geopa-Copa and EFFAT – on the deployment of seasonal workers from European countries in the EU</i>	Ensure free access of seasonal workers to countries where temporary labour is required.	Ensure compliance with Covid-related health requirements at the seasonal workers' workplace and accommodation, and during transportation; provide seasonal workers with information and protective equipment.	Ensure that wages are in line with collective agreements or national legislation; ensure access to social protection, and to the medical authorities in the event of sickness.

Automotive and metal industries

Little did the European Automobile Manufacturers Association (ACEA) know at the beginning of 2020, just at it welcomed the buoyancy in the EU automotive market for private cars (for the sixth consecutive year) and commercial vehicles (for the seventh consecutive year),⁸² that, only a few weeks later, the market would sink like a stone to a historic low. The containment measures taken by European states in spring 2020 led to factory shutdowns across the whole of Europe, and, for the year 2020, there was a 22.9% drop in annual production compared to 2019. This amounted to 4 243 577 fewer vehicles, including passenger cars, trucks, vans and buses.⁸³

The significant drop in air pollution caused by plummeting production and vehicle use as a result of movement restrictions was even visible from space;⁸⁴ it also had a major impact on the European economy. The European automotive sector is one of the mainstays of the economy (7% of GDP), employment (13.8 million jobs), external trade (the automotive industry generates a trade surplus of EUR 84.4 billion), industrial research (EUR 57.4 billion per year) and chains of subcontractors. In a nutshell, the Covid crisis shut down the production and distribution of cars in Europe for several weeks. Sales collapsed, investment was suspended, and workers supported by partial unemployment schemes saw their incomes fall.

The social partners in the automotive and metal sectors adopted two joint documents in 2020 on the Covid crisis.

⁸². Agence Europe, 17 January 2020 and 25 January 2020.

⁸³. <https://www.acea.be/news/article/interactive-map-Covid-19-impact-on-eu-automobile-production-full-year-2020>

⁸⁴. [http://www.esa.int/ESA_Multimedia/Keywords/Description/Air_pollution/\(result_type\)/videos](http://www.esa.int/ESA_Multimedia/Keywords/Description/Air_pollution/(result_type)/videos) ; http://www.esa.int/ESA_Multimedia/Videos/2020/03/Coronavirus_nitrogen_dioxide_emissions_drop_over_Italy

European social partners in the automotive and metal industries

- **Workers in the metal industry:** industriAll Europe represents 7 million workers who belong to 180 national trade union affiliates in 38 European countries, chiefly in the metal, chemical, energy, mining, textile, clothing and footwear sectors;
- **Automotive manufacturers:** the European Automobile Manufacturers Association (ACEA) represents 16 major car, van, truck and bus makers;
- **Motor trades and repairs:** CECRA (European Council for Motor Trades and Repairs) is the umbrella organisation for national professional associations representing 336 720 vehicle dealers and repairers;
- **Suppliers:** the European Association of Automotive Suppliers (CLEPA) represents more than 3 000 businesses supplying components and technologies to automotive manufacturers;
- **Tyre and rubber manufacturers:** the European Tyre and Rubber Manufacturers' Association (ETRMA) represents close to 4 400 businesses in the EU
- **The metal industry:** Ceemet (European Tech & Industry Employers) represents 200 000 businesses in the metal, engineering and technology-based industries in Europe.

a) Joint statement of industriAll Europe, Ceemet, ACEA, CLEPA, CECRA and ETRMA on a call for an ambitious recovery plan for the automotive sector

On 26 May 2020, all associations representing the automotive sector signed a joint document calling on the European Commission to propose a 'bold' industrial recovery plan. Based on the Green Deal, the plan should, state the signatories, support the industry in its journey towards a carbon-neutral future: the sector had already been investing in the transition (batteries, connected cars, mobility services, etc.), but the Covid-19 crisis and its impact on the industry now required, they said, further support from the European and national public authorities to make the necessary investments.

To that end, they focus chiefly on two aspects: first, the need for coordinated measures and harmonised guidance on preventive health and safety measures in the workplace; secondly, support for businesses such as a share of state aid, tax breaks, soft loans and the continuation of partial unemployment arrangements to protect workers' incomes and job security. They call for the comprehensive package of support measures for the sector to include vehicle renewal schemes⁸⁵ ('scrappage premiums'). We note that similar programmes were implemented in the aftermath of the 2008 financial crisis and that they were criticised for not predicating the aid on climate goals. On this point, the signatories propose that the programmes should 'be differentiated according to safety and environmental performance based on certified CO₂ emissions'.

85. The EU automotive fleet is ageing year on year. The average age of a private car is now 11.1 years, 11 years for a van and 12 years for a heavy goods vehicle.

Moreover, the social partners call on the Commission to take a series of measures to facilitate digital and climate transition. They include the development of technology programmes, support for investment to introduce new technologies, the roll-out of charging and refuelling infrastructure ('at least 2 million charging points and refuelling stations across the EU'), market incentives to promote the uptake of alternative powertrains (hybrids, batteries, hydrogen fuel cells, etc.), industrial alliances to share the cost of development, use of innovative public procurement to support demand, investment in research and development, development of the circular economy (recycling, re-use) and, finally, support for automotive SMEs to redefine their value chain positioning.

In order to stave off bankruptcies and prevent mass redundancies, the signatories call for anticipation of change, social dialogue at all levels, active labour market policies, training and re-skilling, and support for redevelopment plans for the automotive regions.

b) 'The EU should join forces to combat Covid-19 and reboot industry'

A second joint document on Covid-19 was signed on 12 June 2020, but this time only by the metal industry (Ceemet on the employers' side, industriAll on the workers'). In it, they voice their concerns about the tens of thousands of large and small businesses in the supply chain and the millions of workers who are either unemployed or partially unemployed. The risk of bankruptcies is high, the signatories note, even after lockdown has lifted, because of the massive drop in orders.

The priority was therefore to keep factories open. This means establishing health and safety protocols and preventive measures, remote working where possible and providing personal protective equipment. The EU and the Member States should coordinate and support the production of such equipment to ensure that industrial activity in key sectors can continue.

In their joint document, the signatories welcome the mechanisms put in place in the Member States and at EU level, namely adjustments to part-time unemployment schemes, deferrals of tax or social security payments, the SURE programme and the Next Generation EU proposal, the relaxation of state aid rules and the suspension of the Stability and Growth Pact. However, they also note the importance of restoring supply chains, including by facilitating the free movement of cross-border workers so that they can continue to work safely thanks to protective equipment, preventive measures and access to childcare.

In conclusion, the social partners call on their industry to be at the heart of European and national recovery plans, for social dialogue to remain the 'compass' for their implementation and for special attention to be afforded to training young workers and apprentices. They conclude that 'Europe relies on qualified, young people to work in the green and smart industries of the near future'.

Table 27 Automotive and metal industries – two joint 'Covid' texts in 2020

Date	Title	Priority 1	Priority 2	Priority 3
28/05/2020	<i>Joint statement of industriAll Europe, Ceemet, ACEA, CLEPA, CECRA and ETRMA on a call for an ambitious recovery plan for the automotive sector</i>	Stimulate industrial recovery and support the journey towards a carbon-neutral future.	Support businesses: state aid, tax breaks, soft loans, support for demand (recovery plan, scrappage premiums, public procurement, etc.), and support for research and development, industrial alliances, infrastructure deployment, etc.	Adopt industry-wide, coordinated, preventive health and safety measures; retain short-term working measures; anticipate change and develop social dialogue.
12/06/2020	<i>'The EU should join forces to combat Covid-19 and reboot industry'</i>	Keep factories open and restore supply chains.	Establish health protocols, provide protective equipment, roll out distance working where possible.	Put the industry at the heart of national and European recovery plans; prepare future generations through training and skills programmes.

Local and regional government

Although underrepresented in the European Union's political system,⁸⁶ local and regional government plays an important role in citizens' lives and economic life more broadly. According to the Council of European Municipalities and Regions (CEMR), close to 70% of public-sector investment in Europe is by subnational bodies. Additionally, the linkage between the European and the regional or local levels is certainly stronger than one might think: 60% of decisions taken by towns, municipalities and regions are influenced by European legislation, CEMR notes.

The municipalities and regions were on the front line of the Covid-19 crisis. They were the bodies that had to implement and enforce lockdowns while ensuring that essential public services continued to be provided, including healthcare and support for the most vulnerable. They were also the ones who had to manage the gradual relaxation of lockdown measures. In order to tackle the crisis, doctors, nurses, police officers, social workers, cleaning staff, civil servants and volunteers were marshalled and organised at local level.

However, the crisis has resulted in towns, municipalities and regions facing a drastic fall in revenue as a result of shutdowns (including of theatres, museums and sports centres), a collapse in activity and general economic slowdown, leading in turn to large drops in tax receipts (local, property, tourist taxes) and registration fees (nurseries, crèches, markets, etc.).

The cost of the crisis was assessed in a survey conducted by local and regional authorities.⁸⁷ Additional costs included protective equipment (supply of masks to the public, municipal staff, local public services and health professionals, and of

⁸⁶. Only the European Committee of the Regions provides institutional representation for the voices of local and regional representatives (<https://cor.europa.eu/en>).

⁸⁷. https://www.ccre.org/img/uploads/piecesjointe/filename/200629_Analysis_survey_COVID_local_finances_EN.pdf

sanitiser gel and disinfectants, tests, etc.) and other hygiene measures (cleaning, sanitising and disinfecting streets and public spaces, municipal vehicles and waste collection vehicles and containers, etc.). In some countries, hospitals fall under the responsibility of local or regional government authorities, which had to purchase protective equipment and provide direct support to healthcare establishments. In some cases, the authorities had to organise and finance the provision of meals and home deliveries of food and drugs, emergency help for the most vulnerable population groups, psychological support, safe accommodation and reception centres for the homeless, or provide digital technology for distance learning.

These extra Covid-19-related costs contributed to a deterioration in local and regional finances in circumstances that were already complicated by austerity policies in many countries in the aftermath of the financial crisis of 2008. The local and regional government social partners highlighted the difficulties that their members had to address. On the employers' side, CEMR is an umbrella for more than 130 000 federated subnational governments within 60 national associations in 42 European countries. On the workers' side, EPSU (European Public Service Union) represents 8 million public service workers in various sectors: local and regional government, hospitals, central government, and the electricity and gas industries.

On 23 June 2020, when relaxation of lockdown measures was under way, EPSU and CEMR adopted a joint document on the consequences of the pandemic in their sector (EPSU-CEMR joint statement on Covid-19). The document is also an appeal to the addressees not to repeat the policy errors made after the financial crisis in the form of austerity programmes, which added a social crisis to the economic one.

First, the signatories focus on Covid-related health requirements that must be met during relaxation of lockdown, namely the full and prompt supply of personal protective equipment, arrangements for access to public institutions and workplaces in line with strict health protocols and stronger social dialogue in the workplace.

They then move on to the importance of allocating economic resources fairly to the municipalities and regions to allow them to pursue and develop their public service functions. They also note the positive effect that the municipalities and regions have on job retention and creation in their capacity as large employers, so their impact on the local economy is significant.

The signatories then address their affiliates, the European institutions and the national governments. They call on their members to engage in social dialogue and collective bargaining at national level and in the workplace in order to ensure safe working conditions and prevent the spread of the coronavirus. They call on them to explore and discuss new ways of working, working time, remote working and work-life balance.

They then call on the European Commission and the EU Council to promote the ILO's Decent Work Agenda, promote funding and investment in essential public

services, explore further ways of supporting municipalities and regions, and strengthen countries' ability to provide early warnings, reduce risks and manage health risks. They also call for them to consider, with the European sectoral employers and trade unions, the sectoral impacts of the crisis and the specific measures needed to assist the sector.

Finally, the signatories call on the national governments to promote the ILO's Decent Work Agenda and ratify the ILO conventions, involve the national social partners in the unlocking and re-opening process, and ensure full access for front-line public-sector workers to personal protective equipment. They also note the need to compensate municipalities and regions for the additional expenditure and loss of revenue caused by the crisis, the need to invest in job creation and quality public services, and the need to increase funding for childcare facilities and long-term care.

Table 28 Local and regional government – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
23/06/2020	<i>EPSU-CEMR joint statement on Covid-19</i>	Increase national sectoral social dialogue to ensure safe working conditions and explore new ways of working.	Promote funding and investment in essential public services.	Involve the national social partners in processes for relaxing lockdown, ensure full access to protective equipment, and compensate regions and municipalities for additional expenditure and loss of revenue.

Education

Schools closed their doors to no fewer than 1.7 billion children and young people worldwide during Covid-19 lockdowns in 2020.⁸⁸ This wholly unprecedented situation profoundly disrupted learning, and distance- and online-learning solutions were set up as a matter of urgency – often on shoestring budgets – in an effort to provide a degree of educational continuity. Apart from their disrupted learning trajectory, young people and children gradually became demotivated with education, or even disengaged from their schooling because of extended restrictions and repeated uncertainty over the reopening of schools and educational establishments. The OECD considered the situation, warning against hysteresis, i.e. a 'lag effect' from the period of disruption that may become evident at some point in the longer term.

The periods of lockdown and relaxation of lockdown forced teachers, instructors and academic staff to adjust rapidly to new methods of distance education, often without sufficient preparation because skills and equipment were not always appropriate from the outset. The disruption could, of course, be viewed

88. <http://www.oecd.org/coronavirus/policy-responses/education-et-Covid-19-les-repercussions-a-long-terme-de-la-fermeture-des-ecoles-7ab43642>

as an opportunity for pedagogical and educational innovation in the medium or long term. But it rapidly became apparent that the new methods adopted in the emergency also risked exacerbating unequal opportunities among children and young people. Another medium-term risk is that the considerable pressure on the public finances as a result of economic recession will weaken the investment required in education and training.

In order to address these rapid changes, the European social partners in the education sector set out their joint analysis of the conditions necessary to ensure a sustainable resumption of education against the backdrop of the Covid-19 crisis. The European Trade Union Committee for Education (ETUCE) represents more than 11 million teachers and other education personnel affiliated to 132 education trade unions in Europe. The European Federation of Education Employers (EFEE) represents 50 institutions responsible for managing the education systems in 25 EU countries.

In June 2020, when the first measures relaxing lockdown were introduced and schools gradually began reopening, the social partners adopted a joint statement (Joint ETUCE/EFEE Statement on the impact of the Covid-19 crisis on sustainable education systems at times of crisis and beyond). In it, they addressed matters that were still outstanding and made proposals to the public authorities on ways of managing future crises to ensure resilient education systems. EFEE and ETUCE called for a massive programme of public investment in education, training and research. In their joint document, they set out a long list of points (summarised below) that they undertake to promote at all levels.

- **Social dialogue:** strengthen social dialogue on all matters associated with rights and obligations, professional needs and working conditions for all education personnel;⁸⁹ this requires the public authorities to inform and consult the social partners on measures taken to reopen educational establishments and to abide fully by social dialogue outcomes or collective bargaining agreements that were negotiated in response to extraordinary circumstances.
- **Employment and working conditions:**
 - recognise the extra burden that the transition to distance learning represents (new practices and new online tools) and the ongoing preparation for further potential closures of educational establishments;
 - address work-life balance issues, the right to disconnect and discrimination (women educators with family responsibilities have to take on additional burdens);
 - ensure that the introduction of digital tools will be assessed fairly and that they will be used to support quality teaching.

89. Namely teachers, trainers, school leaders, academic staff and other education personnel. The social partners interpret 'education sector' as meaning the whole education sector including early childhood education, primary and secondary education, higher education and research, and vocational education and training.

- **Occupational health and safety:**
 - provide the necessary health and safety equipment for all education personnel, when schools reopen;
 - develop occupational safety and health strategies (prevention and training) taking account of the risk that educational establishments may be viewed as infection hotspots;
 - invest in school infrastructure and digital equipment.

- **Professional development and access to training:**
 - recognise the professional autonomy of all education personnel in their pedagogical and educational decision-making in these exceptional circumstances;
 - provide education personnel with adequate tools, resources, equipment, and initial and ongoing digital training;
 - ensure equal access to development and professional support to mitigate the negative impact of distance learning on the quality of education.

- **Equality and inclusion:**
 - prepare to address the probable widening of achievement gaps for students from disadvantaged socio-economic backgrounds;
 - promote supportive environments for students, teachers, trainers, school leaders, academics and other personnel;
 - close the digital skills gap and ensure that all students have access to good quality digital equipment and teaching;
 - as part of preventive measures, take account of the specific educational needs of vulnerable social groups (migrants, refugees, people with disabilities, disadvantaged groups, ethnic minorities);
 - do more to promote social mobility for future generations of students with a view to narrowing inequalities;
 - help to prepare students to be active and responsible citizens.

- **Vocational education and training:**
 - promote supportive working environments for online or blended teaching, enabling students to engage in learning processes;
 - pursue international mobility and exchanges to the extent possible, including through the use of digital tools;
 - develop links between vocational training and the labour market;
 - address the impact of the economic recession on students' job prospects, including by incorporating that impact into the European Commission's Youth Employment Support package.⁹⁰

- **Higher education and research:**
 - enhance quality working environments for online or blended teaching, enabling students to engage in learning processes;
 - recognize the contribution made by university staff to research, development and innovation;

90. https://ec.europa.eu/commission/presscorner/detail/en/ip_20_1193

- promote academic freedom and institutional autonomy to ensure universities' capacity to encourage basic research;
 - pursue international mobility and exchanges to the extent possible, including through the use of digital tools;
 - support investment in educational research on the impact of the pandemic on learning outcomes and digitalisation of education.
- **Opportunity for innovation:**
- collate the experience of education establishments that were forced to adjust their approaches to teaching in order to develop an approach to digitising education (digital tools, methodologies, innovative teaching skills), as well as infrastructure and managing working time.

Table 29 Education – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
26/06/2020	<i>Joint ETUCE/EFEE Statement on the impact of the Covid-19 crisis on sustainable education systems at times of crisis and beyond</i>	Strengthen social dialogue at all levels; recognise the additional burdens taken on by education personnel.	Provide means of safeguarding health and safety at work (equipment, training, strategies); support investment in infrastructure.	Promote supportive working environments and prepare strategies for young people from disadvantaged backgrounds or vulnerable groups; develop a strategic approach to digitising education.

Central government

Around six million people work in public administration in Europe. They are responsible not only for executive and legislative activity, implementing tax regimes, customs administration, statistical services, and the collection and levying of funds, but also for overseeing various sectors of economic activity (energy, transport, communications, etc.), health, training, culture, social services, social security, justice, civil protection, maintaining law and order, security, defence and others.

This non-exhaustive list, which differs in line with the features of each Member State's own institutions, illustrates that the management of a crisis like the one caused by the Covid-19 pandemic pertains largely to the work of central government and the public sector. Whether in the realm of healthcare proper (supply of masks and protective equipment), law and order (enforcing lockdowns, closures, travel restrictions, etc.), even more so in the area of socio-economics: in November 2020, the OECD noted that governments 'have spent more than USD 12 trillion globally since March 2020. Many countries, and the EU, have reallocated public funding to crisis priorities, supporting health care, SMEs, vulnerable populations and regions particularly hit by the crisis. In addition, more [than] two thirds of OECD countries have introduced measures to support subnational finance – on the spending and

revenue side – and have relaxed fiscal rules. Many governments announced large investment recovery packages (...) focusing on public investment.⁹¹

Although the role of governments is central to the management of a pandemic of this nature, the governments themselves have also been affected by the crisis. Like many other sectors, they were forced to close their doors, offices and services during the first lockdowns in spring 2020. They had to find solutions as a matter of urgency so as to be able to provide policy continuity. Clearly, the digitalisation of public services is a process that has been under way for some considerable time across the public sector and administrations, but the process had to be fast-tracked even though officials discovered overnight that they would be working from home.

The Covid-19 crisis has also thrown into relief the extent to which governments have been undermined by myriad reforms: decentralisation, modelling of working conditions and work status on the private sector, privatisation of services, and above all the huge pressures of austerity in recent years (including in the aftermath of the financial crisis), even though governments have been required to improve the quality of their services to citizens and invest in new technology. In an atmosphere of complete uncertainty, the central governments had to make ‘difficult trade-offs given the health, economic and social challenges [the virus] raises’.⁹²

At end-June when containment measures were being relaxed and there was hope that the pandemic would fizzle out, the social partners adopted a joint text focusing sharply on the need to invest in the public sector to make it stronger in the event of a new wave or a new epidemic. Employers fall under the umbrella of the European Public Administration Employers (EUPAE) which represents 11 Member States (Belgium, Czech Republic, France, Greece, Italy, Lithuania, Luxembourg, Romania, Slovakia, Spain and the United Kingdom) and five observer countries (Austria, Germany, Hungary, Malta and Portugal).⁹³ The workers are represented by the Trade Unions’ National and European Administration Delegation (TUNED), which combines the European Public Service Union (EPSU) and the European Confederation of Independent Trade Unions (CESI), which together represent 9 million workers and officials in public administrations in 27 of the EU’s 28 Member States.

In their joint document of 30 June 2020 (SDC CGA statement on Covid-19 pandemic and its aftermath: investing in state sector personnel), the social partners begin by noting the key role played by central governments in situations such as a pandemic in protecting the public, providing continuity of public services (healthcare, social services, civil protection, waste management, education, prisons, etc.) and ensuring equal access to those services for all residents.

91. <https://www.oecd.org/coronavirus/policy-responses/theterritorial-impact-of-Covid-19-managing-the-crisis-across-levels-ofgovernment-d3e314e1>

92. <https://www.oecd.org/coronavirus/policy-responses/theterritorial-impact-of-Covid-19-managing-the-crisis-across-levels-ofgovernment-d3e314e1/>

93. https://www.etuc.org/sites/default/files/press-release/files/eupae-tuned_press_release_final.pdf

They then set out an extensive list of bullet points addressed to governments and the EU institutions to ensure that the central governments will be better equipped and prepared to prevent further waves of the pandemic. We summarise and consolidate those points below.

- **Workers' health and safety, and investment.** The document's signatories call for recognition of the vital role of the public sector and an appreciation of its workers in managing the pandemic; and for the need for a much sharper focus on occupational health and safety. During the gradual easing of lockdown at end-June 2020, they note the employer's duty to ensure that all workers are safe and protected in readiness for their return to work. Public servants should be given priority access to protective equipment and screening programmes. The signatories note the key role of investment in the public sector and its staff in order to reduce inequalities and unemployment; they stress the importance of fiscal sustainability for the effective operation of a democratic welfare state.
- **Social dialogue, information and consultation.** The social partners focus on the importance of social dialogue, collective bargaining, information and consultation with staff and their representatives, both on occupational health and safety and more broadly: they take the opportunity this document offers to reiterate its call for the European Commission to implement, in the form of a directive for adoption by the Council, the social partners' agreement on workers' rights to information and consultation. For information, the agreement, dated 21 December 2015, has been a significant bone of contention between the sectoral social partners and the Commission for what is now more than five years.⁹⁴ A document of that nature, say the signatories, would now appear to be more legitimate and relevant than ever.
- **Pay.** The recognition of public-sector workers' dedication should be channelled into fairer wages, especially for those on low incomes who are more exposed to health risks. The social partners call for greater transparency in wages, and greater equality of treatment with workers in other sectors.
- **Digitalisation.** Finally, they note the importance of working with staff and trade union representatives to learn lessons that the changes in ways of working (working from home every day, impact of digital technology) have for occupational health and safety, job content, work-life balance, access to IT equipment, as well as on the quality of and access to public administrations online.

94. Agreement between TUNED and EUPAE on a 'General Framework for Informing and Consulting civil servants and employees of central government administrations'. For an analysis, see: Rainone (2020).

Table 30 Central government – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
30/06/2020	<i>SDC CGA statement on Covid-19 pandemic and its aftermath: investing in state sector personnel</i>	Give public servants priority access to protective equipment; ensure workers' health is protected.	Strengthen social dialogue, and legislate to implement the sectoral agreement on information and consultation for workers.	Ensure fair wages, and learn lessons from the changes to our ways of working.

Textiles and clothing, tanning and leather

The three sectors textiles and clothing, leather and footwear (TCLF) together represent around 200 000 businesses in Europe employing close to 2 million people. Although most are small and medium-sized businesses performing 'traditional' activities, these sectors have made the EU the world leader in creativity, high-end goods and industrial innovation. As a result, Europe is the world's second largest exporter of textiles and clothing and can be distinguished from the rest of the world not only by the quality of its products but also, the industry says, by its consumers' safety, respect for the environment and working rights (even though working conditions in the sector are often difficult and the wages low, especially for unskilled workers).

The liberalisation of the textile trade at the beginning of the 2000s led Europe to restructure massively. In textiles and clothing, many small and medium-sized enterprises disappeared to the benefit of large businesses in technical textiles, fast fashion (Inditex – Zara, H&M) and luxury fashion (LVMH). Although the marketing and design work is still done in Europe, many production and manufacturing jobs have been moved offshore to countries where wages are low and working conditions poor.

In this sector, the Covid-19 crisis has been most apparent in disruption to highly international supply chains, especially during the first periods of lockdown in spring 2020. Factory shutdowns, slowdowns in businesses' production capacities, retail shutdowns and extreme drops in income destabilised all value chains. Thousands of people found themselves unemployed, temporarily at best.

Apart from this immediate effect of the pandemic on sectoral economic activity, the social partners were concerned about the longer-term risks, including when measures to ease lockdowns would be taken. As a consumer goods industry, the sector is highly sensitive to the economic health of world and European markets, and to people's purchasing power. The economic crisis and the fall in income could, in the view of the social partners, endanger businesses in the sector in the medium and long term.

Social partners in the textile, clothing, leather and footwear sectors

- **Footwear:** the European Confederation of the Footwear Industry (CEC) comprises 12 national footwear associations and European federations, and three observer members, representing 21 000 businesses and 278 000 employees in Europe.
- **Textile and clothing:** the European Apparel and Textile Confederation (EURATEX) is the umbrella for 24 national associations in 19 European countries representing around 160 000 textile and clothing businesses that employ 1.5 million workers.
- **Leather and tanning:** the Confederation of National Associations of Tanners and Dressers of the European Community (COTANCE) is the representative body of the national associations for leather, tanners and dressers in 12 countries*, representing 3 000 businesses and 50 000 jobs.
- **Workers:** the trade union industriAll Europe represents workers in the three sectors of textile and clothing, tanning and leather, and footwear, i.e. more than 1.3 million workers in the EU and 2 million in Turkey.

* Austria, Denmark, France, Germany, Hungary, Italy, Netherlands, Portugal, Romania, Spain, Sweden and the United Kingdom.

On 9 July 2020, the TCLF social partners adopted a joint document in which they place special focus on the conditions necessary to ensure a sustainable recovery in the sector (Joint declaration on the economic impact of Covid-19 on the textile, clothing, leather and footwear industries). The conditions related to workers' training, sustainability of production, international competition conditions, aid to businesses, and workers' health and safety. We summarise those various points below.

- **Skills and training.** With a view to a recovery in the European economy and given the fast-tracking of digitalisation as a result of the Covid-19 crisis, skills and qualifications will be crucial in order to reskill and up-skill workers. Support must therefore be given to developing centres of vocational excellence and innovative methods of learning.
- **Sustainability.** Against the backdrop of the Green Deal,⁹⁵ the European and national recovery plans should strengthen and support the industry's commitment to sustainable and circular textiles (including through environmental footprint accounting for all inputs and end products).
- **Reindustrialisation.** The Covid-19 crisis has demonstrated that offshoring industrial production to non-EU countries has not only weakened industrial sovereignty and cost jobs, but has made Europe vulnerable. The fact that some of the third countries do not meet the same social and environmental standards means that reindustrialising Europe can help to meet the EU's climate, environmental and social objectives.
- **Fair competition.** The signatories of the document also express concern at the fact that some of the countries that benefit under the Generalised Scheme of Preferences (GSP)⁹⁶ have low environmental and social

95. European Commission (2019).

96. Which benefits Cambodia, Laos, Ethiopia, Bangladesh and Pakistan, among others.

standards that have enabled some of them to join the ranks of the world's largest producers and exporters of textiles, clothing, leather and footwear. In order to re-establish fair competition, the signatories call for an overhaul of the GSP.

- **Aid to businesses.** The support measures provided for at European level (aid to Member States, kick-start to the economy and investment) can meet the challenges facing the sector if they are effectively implemented in respect of businesses and employees; these sectoral support measures should focus, in particular, on innovation and digitalisation.
- **Health and safety.** The social partners call for occupational health and safety guidelines and protocols, and for aid for businesses to implement them effectively (access to protective equipment, training in their use, access to finance to reorganise workshops, etc.). They call for the continuation of measures allowing businesses to establish flexible working, temporary unemployment schemes, sick pay and wage compensations.

Table 31 Textile, clothing, tanning and leather – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
09/07/2020	<i>Joint declaration on the economic impact of Covid-19 on the textile, clothing, leather and footwear industries</i>	Support skills development and training in preparation for kick-starting the sector in conjunction with digitalisation.	Reindustrialise Europe in order to help it attain its objectives in social and climate-related matters; overhaul the GSP to achieve fairer world competition.	Effectively help businesses by giving them the means to implement tailored health protocols; continue measures for flexible working, temporary work schemes, wage compensations.

Chemical industry

It was probably at the beginning of March 2020 that European citizens suddenly became aware all at once of the importance of the chemical industry in their daily lives and of how Europe vulnerable was in that respect: just as the Covid-19 pandemic began to spread across the world, the Indian Ministry of Trade and Industry decided to restrict exports of 26 drugs and active pharmaceutical ingredients. The first cases of coronavirus on Indian soil had been confirmed, and the fears and tensions in the supply chains for active pharmaceutical ingredients supplied to India by China were used as grounds for the Indian Ministry's decision. The restrictions concerned an extensive range of drugs, including paracetamol, antibiotics (ornidazole, metronidazole, tinidazole, neomycin, chloramphenicol), one antiviral (acyclovir), B vitamins (B1, B6, B12) and progesterone-based formulations.⁹⁷

From the outset, the pandemic put the pharmaceutical sector in the news spotlight with the development of diagnostic tests, the search for treatments, the development of vaccine candidates, the production of alcohol-based gel, treatments undergoing trials such as hydroxychloroquine, development of molecular and

97. <https://www.industriepharma.fr/coronavirus-l-inde-restreint-l-exportation-de-26-medicaments-et-api,109314>

antibody tests, etc. It would be an understatement to say that, in spring 2020, the global pharmaceutical industry was booming.

But it was also an opportunity to find out if Europe was still the world's second largest producer of chemical products, behind China and ahead of the United States; according to figures from CEFIC,⁹⁸ Europe has been experiencing a brain drain to Asia in the fine chemicals and pharmaceutical sectors for 20 years, 'today between 60 and 80% of the active substances in our medicinal products come from Asia'.⁹⁹ The pandemic showed European citizens the consequences of this health sovereignty brain drain.

However, the pharmaceutical industry represents only part of the chemical sector. One of the sector's characteristics is that it is a major supplier of products for other industrial activities. Let us consider, for example, petrochemicals, organic solvents, inorganic chemistry, fertilisers, or high-performance materials, polymer additives, ingredients for the cosmetics industry, for coatings, electronics, textiles, phytosanitary products, etc. In Europe, the sector is highly concentrated in a small number of Member States. Two thirds of sales of chemical products in the EU are generated in just four countries: Germany (28.9%), France (14.2%), Italy (13.3%) and the Netherlands (11.5%).

It too is a sector facing many challenges, not least climate transition and sustainability. As an energy-intensive sector, for around 20 years it has been trying to reduce its carbon footprint by cutting its energy intensity and upping its consumption of renewables. It has managed, according to CEFIC, to uncouple its greenhouse gas emissions (down by 53% since 1990) from its (rising) output.

For this sector, like others, spring 2020 was an unexpected watershed. The pandemic had a devastating effect on some of the end markets for chemical products. The economic downturn depressed demand, especially in the automobile industry, construction and other downstream industrial sectors that were seriously affected.¹⁰⁰ Supply chains were disrupted by shutdowns of factories and production sites. Remote working and digital technology allowed some businesses to engage in some activities, but only partially because remote working arrangements were not always suitable (many jobs at plants cannot be done remotely), and there were cybersecurity issues.

Although part of the chemicals industry is therefore especially vulnerable to the pandemic and its economic and industrial consequences, other subsectors can gain an advantage from it, as noted above: pharmaceuticals, and – say PwC¹⁰¹ – the subsectors for personal health products, personal protective equipment and household products.

98. CEFIC, the European Chemical Industry Council, is the voice of large, medium and small chemical businesses across Europe, accounting for approximately 15% of world chemicals production (<https://cefic.org>).

99. <https://www.info-Chemical industry.fr/Chemical industry-fine/>

100. <https://www2.deloitte.com/uk/en/insights/industry/oil-and-gas/Covid-19-chemicals-industry-impact.html>

101. <https://www.pwc.com/us/en/library/Covid-19/coronavirus-impacts-chemicals.html>

The European social partners in the sector adopted a joint document in July 2020 when most of the lockdown measures taken in the spring were being relaxed or lifted and businesses were re-starting their activities. The partner for the employers is the European Chemicals Employers Group (ECEG), which is the voice of 18 national employer organisations in the chemicals, pharmaceuticals, rubber and plastics industries, and represents a total of around 94 000 businesses and 3.3 million jobs in Europe (it is, in some ways, the ‘social arm’ of CEFIC¹⁰²). For the workers, the partner is industriAll, which represents trade union organisations in the main sectors as follows: chemicals, rubber, plastics, glass, paper, cement and non-coal mining.

The text adopted by the chemical industry social partners on 17 July 2020 is addressed chiefly to businesses, sectoral organisation, and workers’ committees or representative bodies (Joint recommendations on safe and healthy workplaces in the Chemical, Pharmaceutical, Plastics and Rubber Industries in times of Covid-19). It provides them with advice for a safe return to the workplace based on OSHA¹⁰³ and ILO¹⁰⁴ guidelines and on examples of sectoral agreements already negotiated. While, in summer 2020, some businesses had already drawn up recovery or continuity plans, others were gradually restarting their activities. The signatories wanted to encourage workers to be involved, through their representative bodies, in general risk assessment, and the design and implementation of measures.

- **Social dialogue at company level.** Businesses are encouraged to draw up a contingency/continuity plan to ensure the protection of their personnel, suppliers, customers and visitors, and the maintenance of their activities. Social dialogue at company level should identify and implement any necessary preventive measures and establish emergency preparedness procedures in case of a new wave of the virus.
- **Information for employees and visitors.** Employers must provide information and specific Covid-19 training. Workers must follow established procedures and participate in training organised by the employer.
- **Content of plans.** The contingency/continuity plans must include the following: hygiene measures, personal protective equipment, social distancing, remote working, reorganisation of working hours and shift systems, limits on the number of people in changing rooms and canteens, reorganisation of entry and exit points.

Additionally, ECEG and industriAll Europe encourage their members to examine jointly possible chemical hazards resulting from increased use of cleaning and disinfectant agents, ergonomic risks from awkward posture due to inadequate facilities and equipment (due to compulsory remote working), and psycho-social

102. In fact, in the 1990s, CEFIC refused to regard itself as a social partner; its view was that it was an industrial lobby only. However, it ultimately established the ECEG in 2002 (Dufresne *et al.* 2006).

103. https://oshwiki.eu/wiki/Covid-19:_Back_to_the_workplace_-_Adapting_workplaces_and_protecting_workers

104. https://www.ilo.org/global/topics/safety-and-health-at-work/resources-library/publications/WCMS_745549/lang--en/index.htm

risks. The needs of workers with greater health risks and/or special needs should be taken into account.

Finally, the signatories recommend that no worker recognised as being at risk should be dismissed during the health crisis because of his/her belonging to a risk group. They undertake to promote these recommendations among their respective members at national level.

Table 32 Chemical industry – one joint 'Covid' text in 2020

Date	Title	Priority 1	Priority 2	Priority 3
17/07/2020	<i>Joint recommendations on safe and healthy workplaces in the Chemical, Pharmaceutical, Plastics and Rubber Industries in times of Covid-19</i>	Draw up contingency/continuity plans to ensure that personnel, suppliers, customers and visitors are protected, and activities keep running.	Inform and train workers in preventive procedures; set out hygiene measures, ensure use of personal protective equipment, social distancing, etc.	Be aware of chemical hazards (disinfectant agents), ergonomic (remote working) risks and psycho-social risks. Take account of at-risk workers' needs.

2.3 General summary

In an attempt to provide an overview of the various measures addressed by the social partners in the 30 sectors analysed, we have compiled a chart grouping the measures into 11 broad categories:

1. **Health guidelines for businesses** (protective equipment, training in preventive measures, etc.);
2. **Support for businesses** (financial and/or fiscal aid, etc.; funding or investment programmes for the public sector);
3. **Access to European funds**, European and national recovery funds;
4. **Employment protection** (temporary unemployment arrangements, income supplements, sick pay, access to childcare, etc.);
5. Support for **training**, adjustment to digitalisation and new ways of working;
6. European **harmonisation** of health protocols;
7. **Coordination** of national measures;
8. Recognition of **key workers** (exemptions from some restrictions);
9. Temporary **relaxation** of rules (extensions of validity for licences, certificates, authorisations);
10. Continuity of **supply chains** (exemption from movement restrictions);
11. **Market measures** (support by way of public procurement, import restrictions, etc.).

Figure 6 shows the number of occasions that the European sectoral social partners called for measures in each of the categories above during the Covid-19 crisis in 2020. Annexed to this paper is a table disaggregating the figures by sector.

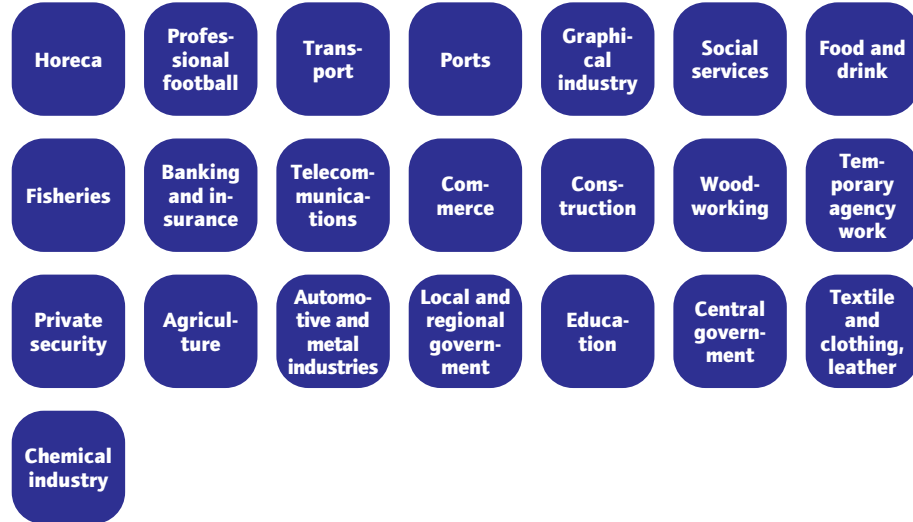
Figure 6 Summary of measures called for by the European sectoral social partners during the Covid-19 crisis in 2020



Source: Devised by the author

It is clear that the priorities voiced most widely (22 of 30 sectors) relate to recommendations and health measures to protect health and safety in businesses for workers, customers and suppliers (alcohol-based gel, protective masks, plexiglas, etc.). The sectors that are most public-facing – horeca, transport, social services, private security, temporary agency work, education, administration, etc. – view such measures as an absolute prerequisite for resuming or continuing to perform them, and, in some cases, they request public aid to fund the protective equipment and the associated costs.

Figure 7 Health guidelines for businesses



Source: Devised by the author

The second most widely shared priority (19 sectors) is financial support for businesses in every possible form: tax waivers or reductions, support for cashflow, access to emergency funds, bank guarantees, tax or social security payment deferrals, state aid, etc. The aim is to prevent bankruptcies by (temporarily) helping businesses to weather the recession.

Figure 8 Support for businesses



Source: Devised by the author

Job protection ranks third (16). Broadly speaking, the aim is to prevent job losses during the crisis and to ensure that work teams can be quickly reassembled when the recovery comes. To this end, the measures called for concern, among other things, access to temporary unemployment measures, temporary part-time working, income supplements and access to various social security benefits (sick pay, etc.). In that regard, we note that, unusually, the social partners in many sectors call for 'atypical' or 'fringe' [peripheral] workers to have access

to temporary unemployment or to social security benefits: the self-employed, freelancers, gig workers (live performance, audiovisual, travel agencies), migrant and posted workers (construction), undocumented or undeclared workers (home care services), subcontractors (food and drink industry), seasonal workers (agriculture, horeca), etc. In this respect, the pandemic would appear to have shed light on a host of insecure or ‘fringe’ workers who are nonetheless essential to the economy. This observation is worthy of special note because it is fairly rare for social dialogue to include traditionally self-employed workers or subcontractors among persons of concern to them.

Figure 9 Job protection



Source: Devised by the author

Next are calls for certain sectors to be recognised as ‘essential’ (13). This recognition opens the way to priority access for workers to health protection equipment, waivers for travel authorisations, and priority access to vaccines and childcare services. The essential sectors include, in particular, transport, social services, food and drink, commerce, government administration, private security, industrial cleaning and, of course, agriculture.

Figure 10 Recognition of key workers

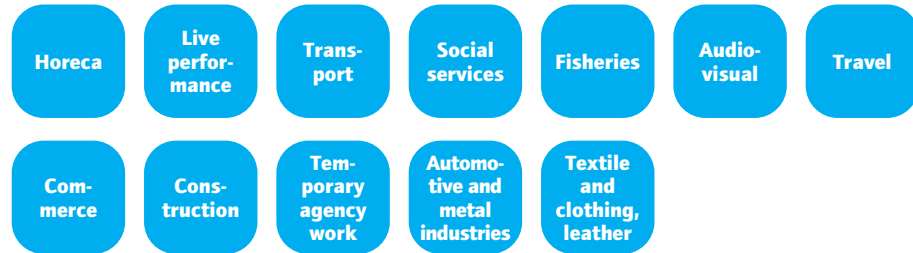


Source: Devised by the author

Then there are 12 sectors where access to finance from European and national recovery funds is regarded as key. Some of the sectors have historically been customers of recovery plans of this kind, e.g. the automotive, aviation and construction industries. However, this time, the list includes other sectors that are

usually further removed from measures like this, e.g. horeca, live performance, social services, audiovisual and travel agencies. The social partners in these sectors call for guarantees that they too will have access to such finance under the recovery plans.

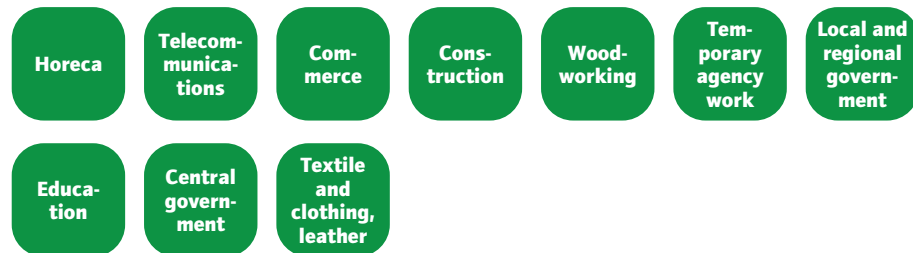
Figure 11 Access to European funds and recovery funds



Source: Devised by the author

In view of the sudden fast-tracking of economic digitalisation and remote working, the social partners in 10 of the sectors have sought to seize the opportunity offered by the crisis to develop and beef up workers' training and skills, especially use of digital tools and new ways of working. This has been particularly evident in commerce (in the form of e-commerce), education (distance learning), government administrations (online services), horeca (online ordering) and temporary agency work, etc.

Figure 12 Support for training and new ways of working



Source: Devised by the author

The call for European harmonisation of health protocols is voiced by eight sectors that, somehow or other, have had to navigate their way through the differences in national preventive measures. This was the case for tourism, maritime transport, aviation, ports, construction, food and drink, automotive and social services sectors (especially for cross-border workers).

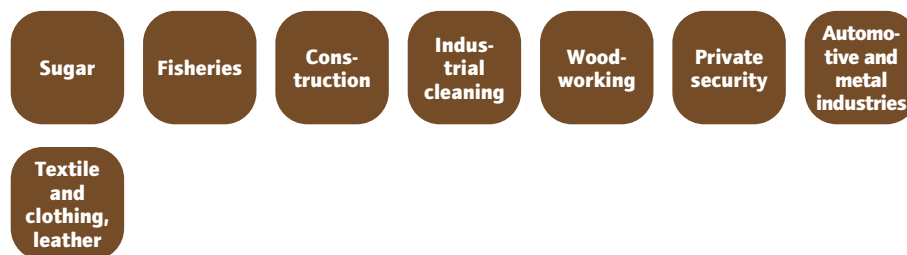
Figure 13 European harmonisation of health protocols



Source: Devised by the author

Market measures are viewed chiefly in relation to a recovery in economic activity. Eight sectors call for such measures in the form of import restrictions (sugar), promotional campaigns (fisheries products), calls for tenders (private security, cleaning, construction, woodworking) and scrappage premiums (automotive).

Figure 14 Market measures



Source: Devised by the author

Measures to ensure supply chain continuity are called for by the sectors that are fairly heavily reliant on them, namely the automotive, construction, commerce, food and drink, ports, sugar and graphical industries.

Figure 15 Continuity of supply chains



Source: Devised by the author

Next are the recurrent calls across the transport sector – involving all forms of transport (maritime, road, air) – as well as two highly mobile sectors (football and live performance) to establish harmonised rules that are coordinated across the Member States, on crossing borders. Since the first days of the pandemic, the sectors have faced a ‘patchwork’ of national rules and standards (civil aviation), a ‘patchwork’ of government measures (road transport) and, in short, a fragmented Europe (live performance) that has placed new obstacles in the way of business recovery.

Figure 16 **Coordinated national measures**



Source: Devised by the author

The final set of measures relates to the call for temporary relaxation of certain specific rules concerning certification, the validity of licences or certificates, and compulsory training or re-training periods.

Figure 17 **Regulatory relaxation**



Source: Devised by the author

Finally, to conclude this analysis, we should note that all sectors stated the importance of social dialogue in managing the crisis, especially with regard to implementing preventive health measures. The object here is to ensure that workers can claim ownership of the measures. Some sectors also stress the need to involve the social partners at various levels (within a business, regionally, nationally, Europe-wide) in implementing any future recovery plans and public (re)investment strategies; this is especially true for central, local and regional government administrations and education.

Conclusion

The Covid-19 pandemic has sparked an upsurge of activity in European sectoral social dialogue committees. An exceptional number of joint documents were negotiated in 2020 by the social partners in an equally exceptional number of different sectors. Never has an issue triggered so much joint discussion and collective bargaining in Europe.

This can be explained by the fact that the public authorities have managed the pandemic chiefly on a sectoral basis. The bulk of measures taken have concerned the opening or closure of entire sectors: horeca, schools, shops, public administration, culture, tourism, etc. Through no fault of their own, a group of sectors became the main adjustment variables in the pandemic.

Another factor is the systemic impact of the crisis across all economic activity in the EU and around the world: on industry, agriculture, supply chains, commerce, services, etc. No sector has escaped disruption, and interlinkages have been cast in high relief as never before.

That fact doubtless explains the impression of a 'holy union' that comes to mind when analysing the various documents produced by the sectoral social partners. The task at hand is to save all businesses, jobs, sectors and ultimately the European economy. To that end, an extensive range of requests was made to the public authorities. In particular concerning:

- health measures: access to personal protective equipment in businesses, information on health protocols, recommendations for health and safety at work;
- economic measures: business support, state aid, access to credit, relaxation of rules, deferral of some requirements;
- social measures: access to temporary unemployment measures, social security benefits, protective equipment, childcare services;
- measures for recovery and transition: training for digital jobs, aid for green investment, support for new ways of working, digitalising services, etc.; as well as a range of more specific measures.

Sectoral social dialogue in 2020 also highlighted major discrepancies across sectors with a high rate of cross-border mobility (transport, live performance, professional football, etc.) and the lack of consistency in the national policies of Member States. Thus there is much criticism of 'patchworks' of national rules and standards (civil aviation) 'patchworks' of measures taken by governments (road

transport), a fragmented Europe (live performance, travel agencies), etc. The pandemic has shown that, although highly Europeanised, these sectors still have to grapple with differences or even discrepancies between national policies that often result in inconsistencies capable of bringing certain economic activities to a standstill.

Moreover, the Covid-19 crisis would appear to have a counter-balancing effect on the crisis of 2008-2012. During the latter, the ‘new economic governance’ implemented by the EU from 2011 onwards placed enormous pressure on collective bargaining, wages, social security benefits, trade unions and social dialogue, labour market ‘rigidities’, the easing of ‘burdens’, the ‘excessive’ cost of government administrations and public services, etc.

In contrast to the 2008 crisis, the Covid crisis has provided evidence of the vital nature of social dialogue, good working conditions and employment support measures. Covid-19 has reminded us that businesses have a crucial need for workers who are in good health, motivated and protected, are involved in measures taken with them in mind and participate as stakeholders in decision-making processes. The importance of social dialogue, of informing and consulting workers, and of training, is noted by all sectors; and, from that standpoint, the pandemic has undoubtedly done more to revitalise European social dialogue than any conference could have achieved.

Workers who are often given little consideration, i.e. those in insecure jobs with low wages, are also essential. They are care service workers, the providers of personal, household and public services; they are road hauliers, dockers, cleaning and security staff, teachers and civil servants, to name but a few. To some extent, the Covid-19 crisis is the revenge of these staff, who are essential for the smooth operation of the economy: in 2020, thanks to them, Europeans did not experience broken supply chains, production stoppages, hospital closures, the collapse of trade, food and medicine shortages, public service failures or school abandonment.

This paper has also noted the emergence of new, ‘non-traditional’ stakeholders in sectoral European social dialogue: associations of early childhood care providers, associations for the homeless, associations for people with disabilities, social economy enterprises, etc. Some of them were already organised and had institutional representation at European level, but the fact that their voices have now been heard as part of social dialogue is new, and brings new concerns into the European arena such as undocumented domestic migrant workers. The health crisis has clearly demonstrated that the area of social services and personal services has a European facet.

This paper has also shown that, in many sectors, the measures that the social partners called on the authorities to implement encompassed the self-employed, freelancers, gig workers (live performance, audiovisual, travel agencies), migrant workers (construction), undocumented workers (home care services), subcontractors and atypical workers (food and drink industry), temporary, seasonal and posted workers (agriculture, horeca), among others. As a matter of necessity, the pandemic has pushed the concerns of these key ‘behind-the-scenes’

workers into the social dialogue. The virus has no regard for workers' status. This could be the opportunity for a more inclusive social dialogue that is more concerned with the fissured workplace (Weil 2014), a step that would certainly be a good thing for economic and social cohesion in Europe.

To conclude, we can therefore say that the European social partners have demonstrated the usefulness of inclusive sectoral social dialogue in managing the crisis caused by the pandemic. They thus confirmed the importance of their role as a joint body serving a form of social democracy. However, that conclusion requires validation in the months and years ahead in the form of strong linkages between the social partners at European and national levels. Not least, this includes the matter of European stakeholders' capacity to drive forward and strengthen social dialogue and collective bargaining at national level in order to upgrade key workers effectively and lift those workers in the most insecure jobs out of the shadows. In some countries, the early part of 2021 has already provided evidence of the difficulties of national collective bargaining.¹⁰⁵ Therein lies the ultimate test of the usefulness of European social dialogue.

105. For example, a national strike began in Belgium on 29 March 2021 because employers refused to award a further 0.4% pay rise in 2021. In Germany, trade unions' right to access remote workers online has been the cause of tensions between social partners.

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All links were checked on 12/05/2021

Annex

Table summarising the measures called for by the European social sector partners during the Covid-19 crisis in 2020

	Health guidelines for businesses	Support for businesses	Job protection	Recognition of key workers	Access to European funds, recovery funds	Support for training and new ways of working	European harmonisation of health protocols	Market measures	Supply chain continuity	Coordinated national measures	Relaxation of rules
Horeca	1	1	1		1	1	1				1
Live performance		1	1		1					1	
Professional football	1									1	
Transport	1			1	1					1	
Maritime transport		1	1	1			1			1	1
Aviation		1	1				1			1	1
Road transport										1	1
Ports	1	1					1		1		
Sugar								1	1		
Graphical industry	1	1							1		
Social services	1	1	1	1	1		1				
Food and drink	1	1		1			1		1		
Fisheries	1			1	1			1			1
Banking and insurance	1										
Audiovisual		1	1		1						
Travel		1	1		1						
Telecommunications	1					1					
Commerce	1	1	1	1	1	1			1		
Construction	1	1	1	1	1	1	1	1	1		1
Industrial cleaning			1	1				1			
Woodworking	1	1	1			1		1			
Temporary agency work	1		1	1	1	1					
Private security	1	1	1	1				1			
Agriculture	1		1	1							
Automotive and metal industries	1	1	1		1		1	1	1		
Local and regional government	1	1		1		1					
Education	1	1				1					
Central government	1	1		1		1					
Textile and clothing, leather	1	1	1		1	1		1			
Chemical industry	1										
TOTAL	22	19	16	13	12	10	8	8	7	6	6

Source: Devised by the author

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