FAIR WORK MONITOR

CNV Internationaal

Fair Work Monitor Sugarcane

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Table of Contents

Strengthening the Case for a Living Wage in the Latin-American Sugarcane Industry 1

Methodology 4

Key findings on living wages 6

The link between living wages and worker well-being 12

Conclusions and Next Steps 14

Characterization of participants 16

Strengthening the Case for a Living Wage in the Latin-American Sugarcane Industry

At CNV Internationaal we have been actively working towards a roadmap on living wages in the Latin American sugarcane sector. Anchored in the principles outlined by the International Labour Organization (ILO), and in particular its current policy brief on living wages. The policy brief highlights the importance of inclusive, tripartite wage-setting processes and the role of workers, ensuring collective bargaining mechanisms are strengthened and empowered, and to have evidence-based social dialogue. Thus, making sure workers have a powerful voice in wage debates is essential, not only to accurately assess living wage gaps, but also to drive negotiations based on data that reflects the lived realities of workers.

CNV Internationaal developed a worker-driven methodology to work towards living wages, that starts with worker-led data collection through the Fair Work Monitor. This data collection tool gathers data directly from workers and provides insight into the real situation at hand. Additionally, we conduct root-cause assessments of the socio-economic and market dynamics contributing to inadequate wages and set out a supply chain mapping to understand the sourcing practices of the private sector. Combining the information, CNV Internationaal supports its local partner unions to foster constructive, well-informed and inclusive social dialogue aimed to create and initiate a collective action plan to move towards closing the gap on living wages.

This report is a vital step in our methodology; through the Fair Work Monitor CNV Internationaal has rolled out a survey on wages and the livelihoods of workers, developed in collaboration with The Anker Research Institute. We gathered 1884 responses from workers, directly and indirectly employed, in the sugarcane sector across Honduras, Guatemala, El Salvador, Costa Rica, Nicaragua, Colombia and Bolivia. It captures a worker-centered view on wages and working conditions, reinforcing earlier findings and highlighting persistent wage gaps, particularly for vulnerable, indirect employed sugarcane workers.

This report was made possible through the project ‘A Roadmap Towards Living Wages’, developed in close collaboration with IDH, whose input helped shape the work.

The evidence is clear: especially workers in the agricultural part of the supply chain earn low wages below a living wage standard. These low wages correlate strongly with food insecurity, poor housing, and adverse health outcomes.

In Colombia, for example, 63 percent of industrial workers do not earn a living wage, compared to 96 percent of agricultural workers. Similarly, in Honduras, 36 percent of industrial workers fall below the living wage threshold, whereas this figure rises to 87 percent among agricultural workers. Across the countries included in the study, the share of industrial workers earning below a living wage varies widely—from 13 percent in El Salvador to 74 percent in Costa Rica—with other countries falling in between. For agricultural workers, this number is even more pronounced, from 55 percent in El Salvador to 96 percent in Colombia.

This report not only highlights these challenges but also reaffirms the urgent need for collective action. Our approach emphasizes a collaborative pathway forward, driven by unions, seeking collaboration with the ILO, and other partners in the field such as The Anker Research Institute, IDH, GIZ, GLWC and others, as well as with the private sector and multi-stakeholder platforms, to build an equitable and sustainable future for workers in all agriculture sectors and beyond.

1.1 Living Wage Definition and Methodology

CNV Internationaal follows the widely accepted definition of a living wage from the Global Living Wage Coalition:

"The remuneration received for a standard workweek by a worker in a particular place, sufficient to afford a decent standard of living for the worker and their family. Elements of a decent standard of living include food, water, housing, education, healthcare, transportation, clothing, and other essential needs, including provision for unexpected events."

There are several methodologies for calculating a living wage, and sometimes estimates can vary for the same location. We believe the Anker methodology provides the most evidence-based estimates of the living wage for specific locations around the world, as recommended by the Global Living Wage Coalition. This methodology has been consistently applied in 40 countries.

The Anker methodology calculates a living wage by first determining the cost for a household to achieve a decent standard of living. It considers expenses such as food, housing, non-food essentials (like education and clothing), and a contingency allowance for unforeseen events, all based on international standards of decency from organizations like the World Health Organization (WHO), the International Labour Organization (ILO), and UN Habitat.

By assessing costs like food, housing, education, and essentials, this method offers a clear, internationally comparable measure of a living wage.

It helps companies understand and address the gap between current wages and the living wage. CNV Internationaal also encourages trade unions and companies to use these living wage estimates in their negotiations.

In many countries, the minimum wage is insufficient to provide a decent living and often falls below the level of a true living wage. It is also important to emphasize that a living wage is only a first step. While a living wage should cover the essentials for a basic standard of living, it does not necessarily guarantee full financial security, nor should it be seen as the ultimate goal for personal or societal development.

Country	Minimum Wage	Minimum Wage (Eur)	Living Wage	Living Wage (Eur)
Bolivia	BS 2.250	€ 302	No Anker Living Wage	No Anker Living Wage
Colombia	COP $1.300.000	€ 287	COP $2.141.831	€ 474
Costa Rica	CRC 403.461	€ 749	CRC 484.917	€ 901
El Salvador	US $367	€ 339	US $407	€ 376

2. Methodology

2.1 Survey Development & Living Wages

The survey was developed in collaboration with The Anker Research Institute, which helped improve and strengthen the indicators and questions on wages and living conditions. The survey was tested during a field visit to Nicaragua with focus groups of workers during the harvest season in 2024 and subsequently implemented in the countries included in this study. Key considerations include the need to directly inquire about workers' wages, objectively assess their living conditions, and gather information on additional payments and benefits. A valuable lesson learned is the importance of thoroughly understanding the workers' payment structure (whether it's piece-rate, daily, monthly, or other forms) to ensure that our questions are aligned with their actual compensation practices.

With the survey we can gather information from workers on their basic monthly earnings, additional payments, in-kind benefits, living conditions, and relevant background characteristics. The basic monthly wage is a key metric, as the living wage methodology stipulates that a worker should earn a living wage within normal working hours in a standard workweek, ensuring a stable income. Wage gaps were calculated using these baseline wages.

While some workers receive additional payments or in-kind benefits, this represents only a small percentage of the sample. Including these benefits slightly reduces the wage gaps for those specific workers. To benchmark the living wage gaps, we used data from the Anker Research Institute. Specifically, we referenced the most up-to-date Living Wage estimates available at the time the survey was conducted.

The wage gaps were calculated by calculating the percentage difference with the wage-gap benchmark. For example if a worker in Colombia earns a basic monthly wage of COP $1.800.000 and the Ankers Living Wage Benchmark is COP $2.141.831, then the wage gap for that worker would be ($1.800.000 - $2.141.831) / $2.141.831 ≈ 16%.

2.2 Respondents

The study was carried out through a participatory approach, involving a survey of 1884 workers in seven Latin American sugarcane-producing countries: Bolivia, Colombia, Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua. These countries were selected since CNV Internationaal has worked with partner unions in the sugarcane industry in these countries for decades. Additionally, the partner unions are familiar with the concept of living wages and are aware of the profits of the sugarcane industry. The participatory digital monitoring system was implemented with the help of CNV Internationaal program coordinators in each country, union

leaders, and workers belonging to the participating unions, as well as with workers not part of the unions and/or even directly contracted. The sampling followed a snowball or contagion method, where communication among participants encouraged other potential participants to join.

It is important to note that this type of sampling is non-probabilistic, meaning the selection of participants does not rely on random chance but rather on factors related to the research's characteristics. While efforts were made to achieve a heterogeneous sample, access to workers depended on the reach of CNV Internationaal's social networks and union counterparts, as well as workers' willingness to participate. Workers in the Latin American cane sugar sector are considered a hard-to-reach population due to their dispersion and, in some cases, remote nature — particularly outsourced workers. The level of participation observed reflects workers' trust in CNV Internationaal and its interest in raising awareness about labour rights issues.

The digital monitoring system ensures anonymous and voluntary participation. However, the total number of direct and indirect workers in the sugar sector remains difficult to determine. Some unofficial estimates exist for certain countries—for example, in Nicaragua, the industry is estimated to employ 37,500 direct workers and 136,000 subcontractors.

A comprehensive worker census would require significant effort, including direct engagement with companies.

2.3 Survey Implementation

The survey was conducted online over a period of two months, from February 25 to April 22 2024, using KoboToolbox. KoBoToolbox is a software tool developed by the Harvard Humanitarian Initiative, the academic and research center of Harvard University in the United States. KoBoToolbox is a web-based tool designed to collect information in difficult environments with restricted communication and connectivity using mobile devices (or smart phones). The system only requires an internet connection to download the survey, which is protected by a password and user authentication. Filling out multiple forms does not require an internet connection,

nor does saving the completed surveys, although a connection is required for sending the final forms.

2.4 Data Cleaning

Wage data underwent manual inspection to identify and correct outliers. Any data deemed unreliable was excluded from the analysis. Across all variables, the proportion of excluded data was less than 5%.

2.5 Groups and Representatives

Due to the nature of our sampling approach, we cannot guarantee full representativeness across all subgroups. This may affect the magnitude of calculated wage gaps, as certain groups might be under- or oversampled. To mitigate this, we conducted an in-depth analysis of wages across different groups to identify key disparities.

A significant wage difference was observed between industrial workers (sugar mill employees) and agricultural workers. Based on guidance from The Anker Research Institute, we decided to report wage gaps separately for these groups. Additionally, we only included subgroup-specific wage gap estimates when the sample size was sufficiently large per country to ensure reliable reporting. While this report does not claim to fully represent the wage conditions of all workers in the Latin American sugar industry, it provides valuable insights and a clearer picture of the workers' financial realities.

3. Key Findings on Living Wages

3.1 A significant percentage of workers does not yet earn a living wage

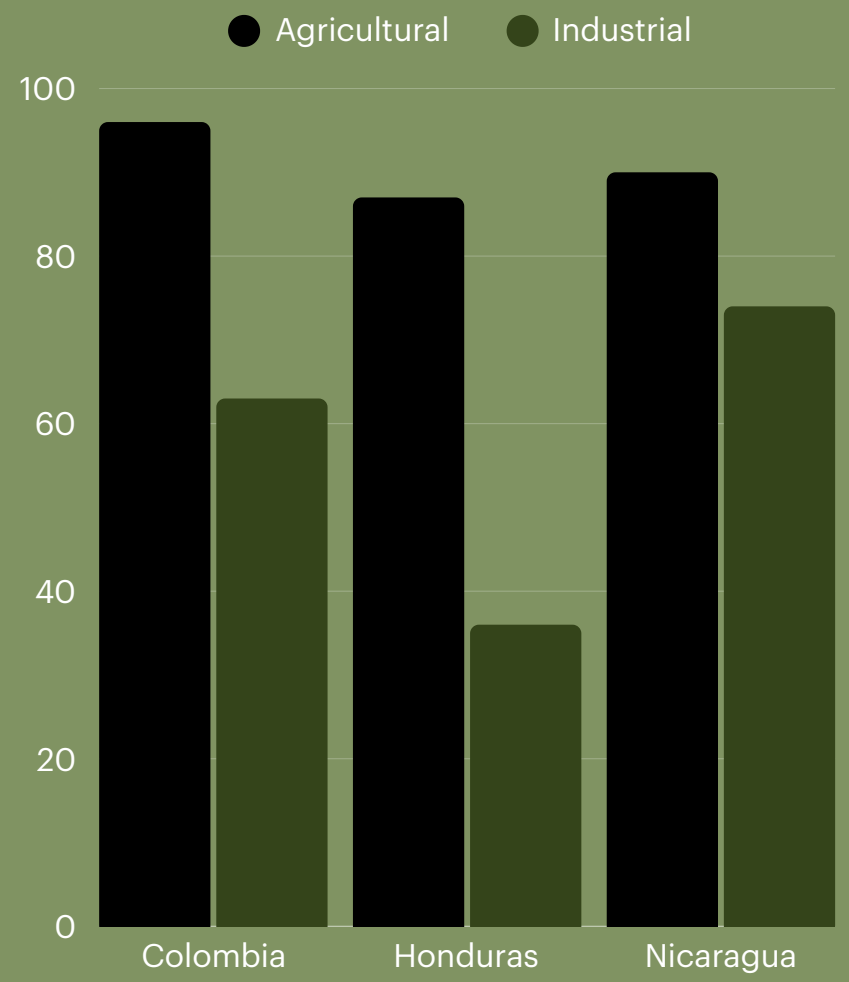
When interpreting the results of this study, it is important to recognize the valuable insights it provides into wage dynamics within the sugar sector. While the sample size and sampling method present some limitations regarding direct generalization to the entire workforce in each country, the analysis within specific sometimes hard to reach subgroups offers meaningful and targeted understanding of key trends. These findings serve as an important foundation for further research and comparison, contributing to a more comprehensive and reliable picture of living wages among sugar sector workers. Additionally, the insights gained can be valuable for CSRD reporting, where stakeholder engagement and transparent sharing of relevant social information are increasingly emphasized.

The data clearly shows that a significant portion of participating workers does not yet earn a living wage. At the same time, the analysis reveals considerable variation, both between countries and across different categories of workers. One of the most striking differences can be observed between workers engaged in agricultural activities—such as field work—and those employed in industrial roles, including work in sugar mills or administrative positions.

In Colombia, for example, 63 percent of industrial workers do not earn a living wage, compared to 96 percent of agricultural workers. Similarly, in Honduras, 35 percent of industrial workers fall below the living wage threshold, whereas this figure rises to 85 percent among agricultural workers. When looking across all countries included in the study, the proportion of industrial workers earning below the living wage ranges from 13 percent in El Salvador to 74 percent in Costa Rica. For agricultural workers, this range is even more pronounced, from 55 percent in El Salvador to 96 percent in Colombia.

Another key difference can be seen when looking at contract types and union membership. A clear pattern emerges: industrial workers are more likely to have permanent contracts, be directly employed, be union members, and earn a living wage. In contrast, agricultural workers tend to have more unstable job conditions, are less likely to be unionized, and have a much lower chance of earning a living wage.

Figure 1: Percentage of workers NOT earning a Living Wage



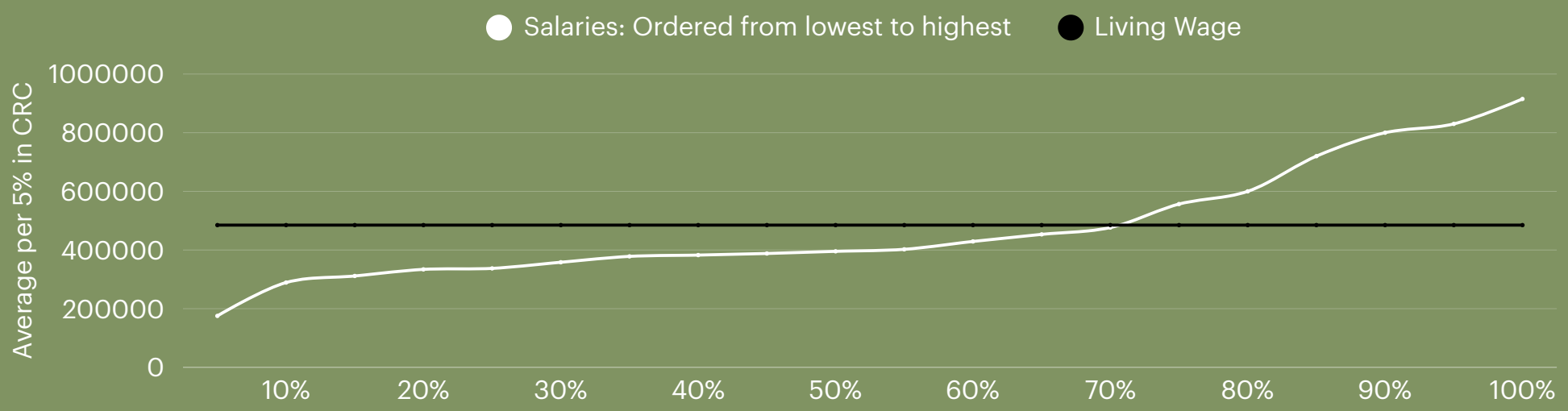
3.2 Substantial differences between the wages of workers

A significant portion of workers does not earn a living wage, and the presence of high incomes at the top end of the wage distribution means that the average wage may appear higher than the living wage. This makes it crucial to examine the income distribution to gain a true understanding of wage gaps and avoid misleading conclusions.

When we focus on agricultural workers we observe that the top 25% earn considerably more than the bottom 25%.

The figure below shows the wages of agricultural workers in Costa Rica, organized from lowest to highest and grouped into 5% wage intervals. From the graph, we can observe a significant gap between the workers earning the least and those earning the most. In Costa Rica, we see a mean salary for the top 25% of agricultural workers of CRC 707,000 (ca. €1.220), while the mean salary for the bottom 25% seems to be only CRC 285,000 (ca. €490). This means that the top 25% of agricultural workers earn significantly above the living wage, while the bottom 25% earns far below the minimum wage.

Figure 2: Differences in Salaries between workers in Costa Rica in Agriculture



Similar patterns emerge among industrial workers, though their average wages are generally higher than those of agricultural workers. However, it is crucial to note that even within the industrial sector, workers in the bottom 25% still face precarious wage conditions. A similar graph to that of agricultural workers in Costa Rica is shown here for industrial workers in Colombia. We see here big differences between the bottom and top earners. We observe in Colombia that the mean salary of the top 25% of industrial workers seems to be COP 2,700,000 (ca. €550), well above the living wage, while our data indicates that the bottom 25% earns only seems to earn COP 1,450,000 (ca. €295) — just above the minimum wage, but still significantly below the living wage. A similar picture emerges in Costa Rica, El Salvador, Honduras, and Nicaragua, where the average wage for the bottom 25% of industrial workers is clearly below the living wage (and often below the minimum wage).

These findings indicate that, even if the average wage were to reach the living wage at some point, there is still a long way to go before all workers are earning a living wage. The wage gap, particularly between the top and bottom earners, remains a significant challenge.

Figures 2: Differences in Salaries between workers in Colombia in Sugar Mills

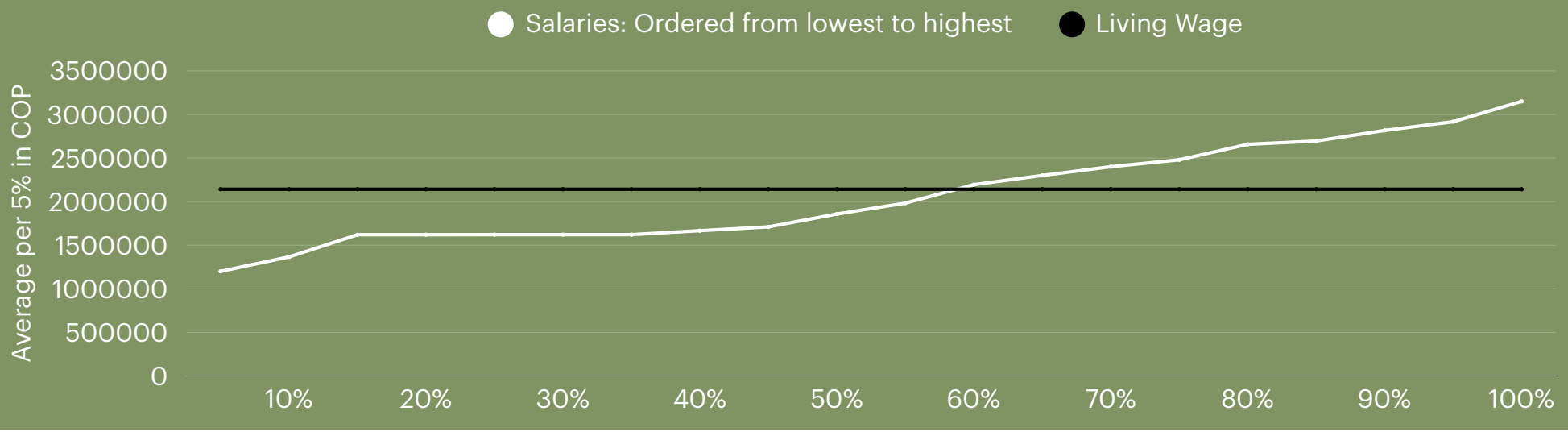
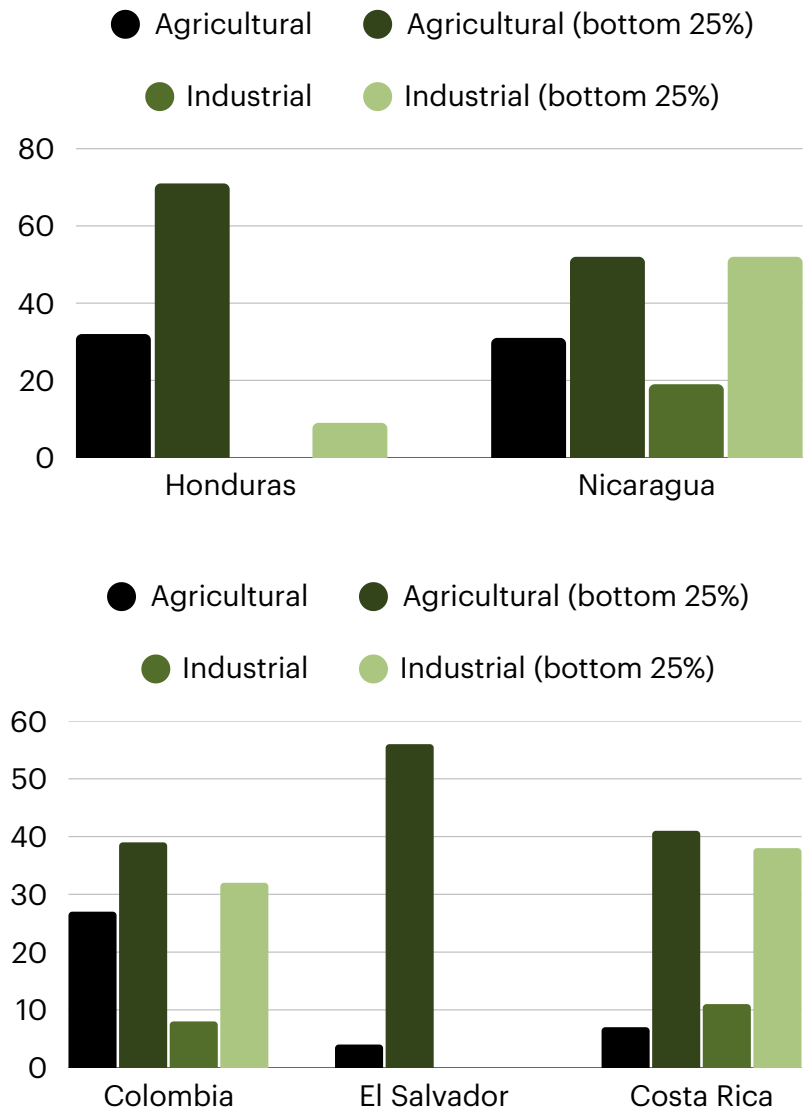


Figure 3: Average gaps (%) to living wage



3.3 Wage gaps to the living wage

Given the significant differences in wage gaps across agricultural and industrial workers, it is clear that substantial progress is still needed before all workers earn a living wage. While agricultural workers, in particular, show the largest wage disparities, industrial workers—especially those in the bottom 25%—also face significant challenges.

For most countries, agricultural workers have the greatest potential for wage improvements. For instance, in Honduras, the average wage gap for agricultural workers is 32%, meaning that a 32% increase in wages would bring the average agricultural worker up to the living wage. However, this increase would not necessarily bring all workers up to the living wage, as the wage gap for the bottom 25% of agricultural workers is much larger, at 71%. This highlights that a significant portion of agricultural workers would still fall short of the living wage, even with a substantial wage increase.

For industrial workers, the wage gaps are smaller but still concerning. In Colombia, the average wage gap for industrial workers is 8%, while the bottom 25% faces a 32% gap. The differences in wage gaps between agricultural and industrial workers are evident, but both groups, particularly those in lower-paying industrial jobs, require substantial wage increases to meet the living wage threshold.

In conclusion, while agricultural workers show the most urgent need for wage improvements, industrial workers also face challenges that should not be overlooked. The bottom 25% of earners in both sectors remain far from a living wage, and this gap highlights the need for comprehensive wage increases across all sectors to ensure that every worker, regardless of job type, can earn a fair and sufficient income.

3.4 Seasonal payments and in-kind-benefits provide improvements, but not an overall solution

In our survey, we asked workers if they received any additional payments or in-kind benefits that might be considered part of their regular income, as suggested by The Anker Research Institute's methodology. The most commonly reported additional benefits across all countries were overtime pay and transport arranged by the employer. Seasonal overtime payments were mentioned by between 39% (in Nicaragua) and 83% (in Honduras) of workers. For these workers, the gap to the living wage is somewhat smaller during busy seasons, thanks to these extra payments. However, it's important to clarify that these extra payments should not be included when calculating the living wage. Overtime, for example, requires workers to work beyond the standard workweek, which goes against the principle that a living wage should be achievable through a regular workweek.

If we were to include all seasonal overtime payments, the average living wage gap for the workers receiving these payments would decrease with a percentage between 14% (in Costa Rica) and 59% (in Honduras). However, it's important to note that the amount of extra payment varies based on a worker's wage level. Workers who earn less are less likely to receive these extra payments. This means that, in the end, these seasonal payments do not help the workers who need them the most.

We observe the same trend with in-kind benefits, such as transport to and from work. Between 12% (in Honduras) and 67% (in Costa Rica) of workers reported receiving transport benefits. Interestingly, in countries where transport benefits were mentioned more often, seasonal overtime payments were mentioned less. If we consider the value of transport benefits, the living wage gap does decrease, but again, the lowest-earning workers are less likely to receive these benefits.

An important goal for unions could be to focus on ensuring that these extra payments and benefits reach the workers wo earn the least, helping to reduce the wage gaps and improve their overall living standards.

4. The Link Between Living Wages and Worker Well-being

Our survey shows a clear link between earning a living wage and reduced levels of health, food, and housing insecurity. Workers who fall short of a living wage face significantly higher insecurity, while those who do earn enough to meet their basic needs report fewer and less severe problems. These findings underscore the urgency of advancing toward living wages for all — and offer hope, showing that progress is both possible and meaningful.

If we look at Honduras, we see a clear contrast between workers who do and workers who do not earn a living wage. 63% of workers who earn less than a living wage report experiencing some form of health insecurity, compared to only 32% of those earning a living wage. The gap becomes even more striking when looking at serious cases. 28% of workers below the living wage level report high or severe levels of health insecurity (workers became (seriously) ill and stopped working), while just 7% of those earning a living wage do the same.

Food insecurity follows a similar pattern, although the difference is slightly less pronounced. Among workers earning less than a living wage in Honduras, 78% experience some level of food insecurity, with 16% reporting that this insecurity is high or severe (workers skipped a meal and felt hunger).

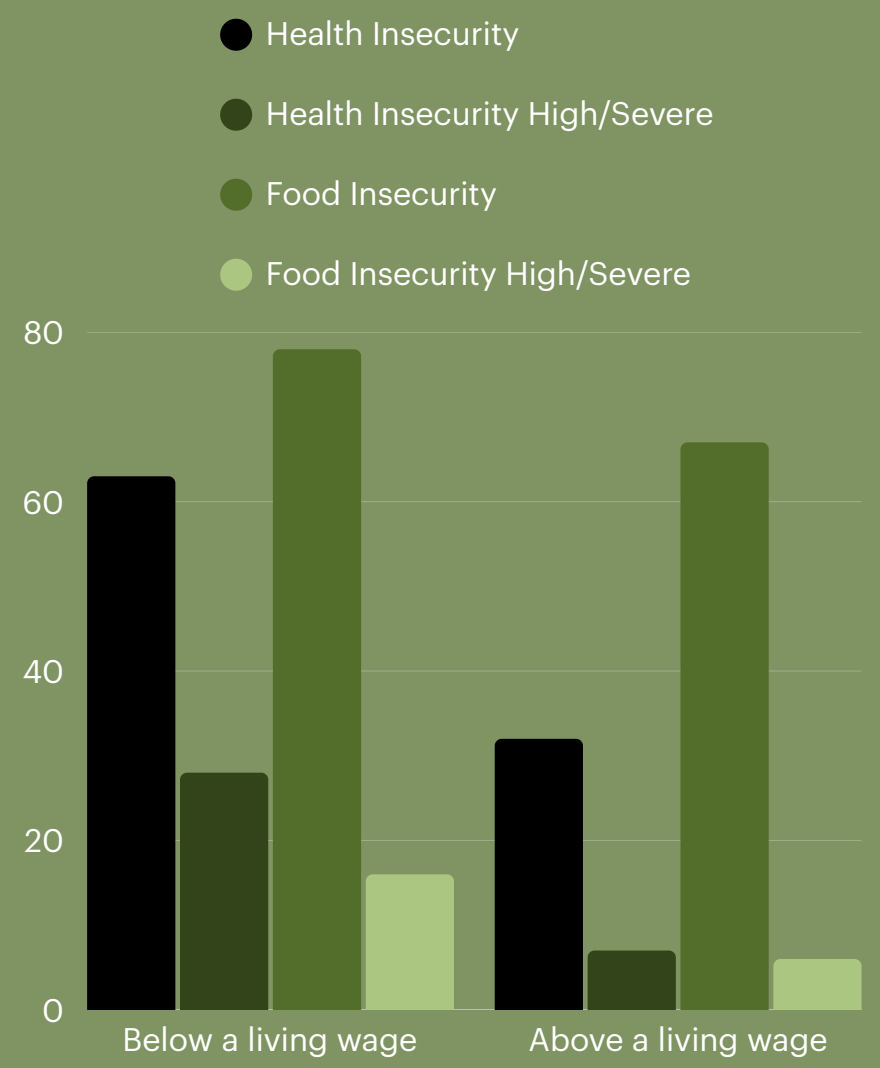
In contrast, among those earning a living wage, 67% report food insecurity, and only 6% describe it as high or severe.
These numbers make it clear that while earning a living wage may not completely eliminate food and health issues, it significantly reduces both how often they occur and how severe they are. Similar patterns can be seen in other countries as well. In El Salvador, 57% of workers who do not earn a living wage report food insecurity, while the rate drops to 47% percent among those who do.

The data also reveals another important insight: the degree to which someone falls below the living wage matters. Workers whose wages are more than 25% below the living wage consistently report more health, food, and housing problems than those whose wage gap is smaller.

This suggests that the issue is not just about whether or not a living wage is paid. Even small steps—like narrowing the wage gap—can already lead to meaningful improvements in people's living conditions. However, these should not be mistaken for the end goal. A fairer world can only be achieved when every worker receives at least a living wage.

In summary, while achieving a living wage for all workers remains a critical goal, our findings show that any movement in that direction already helps. Reducing the wage gap — step by step — can lead to better health, improved food security, and more stable housing for workers and their families.

Figure 4: Percentage of Workers with a form of health and food insecurity in Honduras



5.Conclusions and Next Steps

The lack of a living wage and low wages are recognized human rights risks, and have a prominent role in international standards such as the OECD guidelines and broader adopted and prepared human rights legislation. It is evident the sugarcane sector can be classified as a high-risk industry, and this conclusion can be reinforced by the data presented in this report.

The data of the Fair Work Monitor highlights that several groups of workers, industrial and agricultural, earn wages below the living wage standard. In particular agricultural workers in the sugarcane supply chain earn low wages. The report demonstrates that wage inequality, specifically between top and bottom earners, remain a significant challenge.

The findings suggest that even if average wages increase to meet the living wage, disparities will persist, and not all workers will be able to benefit equally. Therefore, a targeted approach focused to ensure fair compensation for the lowest-paid workers is essential.

Workers earning more than 25% below the living wage consistently report higher rates of health challenges, food insecurity and housing instability. These factors can contribute to decreased productivity, higher turnover, and reputational risks for employers.

Incremental wage improvements can lead to meaningful improvements in workers' livelihoods, workforce stability and overall well-being. The ultimate goal should be to ensure living wages for all workers, however, it being a long-term objective, interventions targeted at the lowest-paid workers is valuable in shaping effective strategies and can function as an early risk mitigation strategy.

Different stakeholders have a different role to play, unions can prioritize their efforts to ensure additional payments and benefits reach those in most need, working towards closing the wage gap, whilst the private sector can reduce exposure to labour-related risks by prioritizing wage adjustments and benefits for their most vulnerable workers, improving livelihoods and fostering a resilient and sustainable labour force.

The concentrated nature of the international sugarcane market implies a crucial role for sugarcane producers, traders and sugarcane consumers, they have a direct role in due diligence processes and taking up a role in promoting solutions. These actors have significant leverage in wage negotiations too, and implementing a structured, step-by-step approach can enable factories and mills to work together with unions and workers to aim to close the wage gap.

Creating transparency across supply chains is fundamental to promote accountability and drive meaningful change, and to drive progress and sustain a level-playing field, the private sector, traders, producers, and unions and workers, should engage in collective action initiatives. A Coalition of the Willing can design due diligence and human rights projects to promote social dialogue and collective bargaining, to reach wage improvements that target those most in need, whilst taking into account the benefits for the private sector too.

The lessons derived from this pilot project in the sugarcane sector will be shared across the value chain, including other agricultural sectors such as bananas and palm oil. Providing technical support to producers and trade unions working towards closing the living wage gap can accelerate progress and facilitate the adoption of best practices industry-wide.

The worker-driven, bottom-up approach developed by CNV Internationaal, in collaboration with its trade union partners and project partners offers a powerful methodology to support the ILO's goals of establishing improved wage-setting mechanisms.

We invite all stakeholders in agricultural supply chains from private sector actors, producers, traders, civil society, to international partners to support CNV Internationaal's bottom-up approach to fair wage-setting. Collective action is essential to scale impact, ensure inclusive progress, and advance the transition toward equitable and living wages for all workers.

Interested in working together? Scan the QR-code to discover our Fair Impact Programme, or visit our website at cnvinternationaal.nl/fairimpactprogramme

6. Characterization of Participants

6.1 Number of Participants

Country	Worker type	Number of Workers
Bolivia	Agricultural	220
Bolivia	Industrial	0
Colombia	Agricultural	414
Colombia	Industrial	57
Costa Rica	Agricultural	59
Costa Rica	Industrial	102
El Salvador	Agricultural	48
El Salvador	Industrial	227
Honduras	Agricultural	151
Honduras	Industrial	186
Nicaragua	Agricultural	179
Nicaragua	Industrial	251

6.2 Background of Participants

Category	Type of Workers	Percentage in Sample
Occupation Type	Administrative	6%
Occupation Type	Field Work	51%
Occupation Type	Harvest	13%
Occupation Type	Industrial Transformation	23%
Occupation Type	Transport Inside the Factory	3%
Occupation Type	Other	4%
Industry Type	Agricultural	56%
Industry Type	Industrial	44%
Gender	Male	89%
Gender	Female	11%
Member Trade Union	Yes	26%
Member Trade Union	No	74%
Main Company or Subcontractor	Main	84%
Main Company or Subcontractor	Subcontractor	16%
Education	None	5%
Education	Primary School	29%
Education	Secondary School	35%
Education	High School	6%
Education	Tertiary education	25%

6.3 Wages of Participants

Country	Type of Workers	(%) Workers Below Living Wage	Median Wage (Local Currency)	Median Wage Gap	Average Wage (Local Currency)	Average Wage Gap	(%) Income Top 25%	(%) Income Bottom 25%	Top 25% wages divided by bottom 25% wages
Colombia	Industrial	63%	1.698.000	21%	1.980.308	8%	37%	20%	1,9
Colombia	Agricultural	96%	1.621.000	24%	1.563.381	27%	30%	21%	1,5
Costa Rica	Industrial	75%	416.000	14%	433.698	11%	35%	17%	2,0
Costa Rica	Agricultural	74%	394.560	19%	449.736	7%	40%	16%	2,5
El Salvador	Industrial	13%	575	-41%	614	-51%	36%	17%	2,1
El Salvador	Agricultural	56%	390	4%	390	4%	42%	11%	3,7
Honduras	Industrial	36%	16.000	-23%	15.915	-22%	33%	18%	1,8
Honduras	Agricultural	87%	9.000	31%	8.835	32%	41%	11%	3,8
Nicaragua	Industrial	74%	9.000	29%	10.297	19%	41%	15%	2,8
Nicaragua	Agricultural	90%	7.800	39%	8.766	31%	39%	17%	2,3

Authors: Michiel Bosma, Maurice van Beers, Daantje Bras
Data Analysis and Interpretation: Michiel Bosma, Maria Paula Quiceno, Camilo Garzon, Rose van der Laan
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Who we are and what we do

CNV Internationaal, towards 100% Fair Work

100% Fair work - that's what CNV Internationaal works towards every day in Africa, Asia and Latin America. We do this by working closely with local partner trade unions and by fostering strong cooperation with other partners, such as companies and governments. Fair work means people can work safely and freely, earning a living wage. Freedom of association and social dialogue are important conditions for achieving this.

100% Fair Work means that women and young people have the same opportunities on the labour market as everyone else: no discrimination in working conditions, on wages, etc.

100% Fair Work also involves examining workers' safety, health and freedom. For this, CNV Internationaal and its partner trade unions make use of innovative tools such as accessible, digital surveys. To know exactly what is going on with workers strengthens our position at the negotiating tables. Moreover, it enables us to measure improvements and the impact of our work.

CNV Internationaal
Postbus 2475, 3500 GL
Utrecht Tiberdreef 4
3561 GG Utrecht

www.cnvinternationaal.nl/en
cnvinternationaal
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