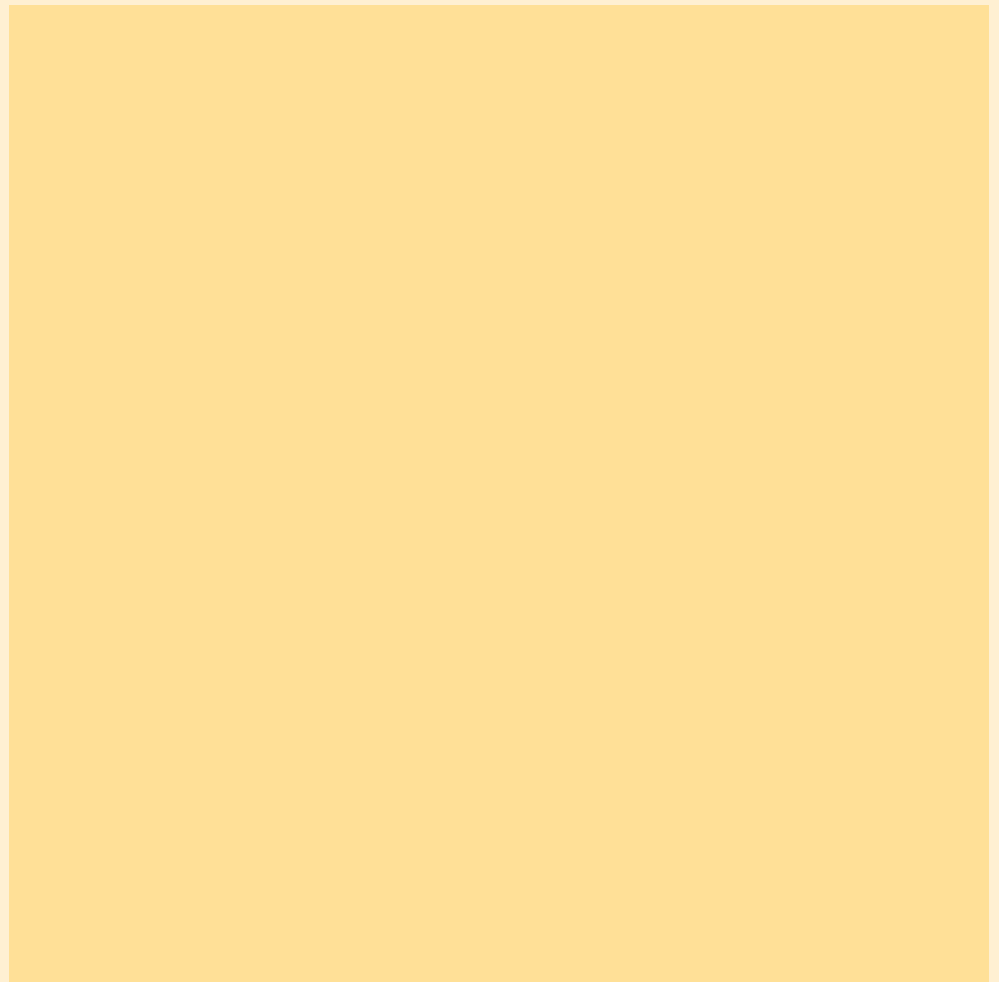




EU road freight transport sector: Work and employment conditions



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Work and employment conditions

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European Foundation for the Improvement of Living and Working Conditions

EU road freight transport sector: Work and employment conditions

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Foreword

Change and development in information technology and the effects of globalisation have had far-reaching implications for many. Not least the road freight transport sector which has undergone unprecedented growth and internationalisation over the last few decades. International competition and technological developments have had both positive and negative effects on the industry. These changes have significantly influenced work and employment conditions in the sector. As this report highlights, creating more and better jobs while enhancing competitiveness is now one of the major challenges faced by the road transport sector.

How the sector will respond to these changes is still unclear. This report provides a crucial snapshot of the situation in the sector, the trends and developments which are shaping the industry and the issues of concern for both those working in the sector and policymakers in this domain. The findings are based on analyses of working conditions and quality of work and employment issues in road transport in the 15 Member States.

The aim of the report is two-fold: to analyse the work and employment conditions in this sector, and to point to major trends and changes in the field. It describes the socio-economic conditions under which the road freight transport sector operates in the EU, and underlines the highly competitive environment of this particular sector.

As the European Union enlarges to include 10 new Member States in May 2004, we trust this report will serve as a timely benchmark from which policymakers can shape a better, safer and more competitive future for the sector.

Willy Buschak
Acting Director

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Introduction

Context

In 2000, the European Foundation for the Improvement of Living and Working Conditions carried out its third European Survey on Working Conditions. It collected information on working conditions, health and well-being of the employed and self-employed in the 15 EU Member States. These three surveys (1990, 1995 and 2000) provide a general picture on the main characteristics of the economic sectors with regard to working conditions. This general picture is sufficient to set priorities, but not enough to understand the reasons underlying the situation described and the policies, at various levels, undertaken to deal with such.

The Foundation commissioned a consolidated report on an analysis of the quality of work and employment in two sectors: 'road transport', particularly the sub-sector 'freight transport by road'; and 'hotels and restaurants'.

The objective of the sector surveys on the quality of work and employment is to provide a cross-sectional overview of working and employment conditions in these two sectors as examples of the European economy. The research project also aims at collecting information on social dialogue in the two selected sectors.

The present report provides a wide range of information on work in the road transport sector, specifically on freight transport by road.

Aims

The aim of this consolidated report on the European road transport sector and sub-sector 'freight transport by road' is to:

- describe the socio-economic context;
- identify the structural characteristics and patterns with regard to labour market issues, working conditions and social dialogue;
- research the employment status, and conditions of work and employment;
- identify risks, risk factors and risk groups;
- outline legislative and regulatory measures related to working conditions;
- analyse other initiatives such as guidelines and codes of conduct;
- show how the social partners are operating; identify and describe the content of relevant collective agreements;
- describe positive examples and good practices aimed at improving working conditions and social dialogue;
- examine possible solutions to improve working conditions and social dialogue;
- analyse potential barriers to the implementation of legislative, regulatory and 'soft law' measures to improve working conditions and social dialogue.

Selected NACE coding

The road transport sector is selected for this particular report, specifically freight transport by road. This restriction has been agreed upon by all partners working on the national reports and with the Foundation.

An overview of the total sector, and the chosen sub-sector, is presented in Table 1. It particularly refers to the NACE sector I.602 (road transport), and more specifically to I.6024 (freight transport by road).

Table 1 An overview of the NACE coding for the transport sector (sector 'I.60')

Transport –sector I
60 Land transport
601 Rail transport
602 Road transport
6021 + 6022 + 6023 =
transport of persons
6024 = freight transport by road
603 transport through pipes
61 Transport over water
611 Transport overseas
612 Inland navigation
62 Air transport
63 Service for transport = distribution
64 Post & telecommunication

For many countries, not all information was available for the different levels in the transportation sector (60, 602 and 6024). The data from Ireland and Greece were particularly scarce for road transport (602) and freight transport by road (6024). Due to the gaps in data, reference is sometimes made to the transport of persons sub-sector. This is done to provide at least some information about the 602 (or 60) data for certain countries. However, this was, of course, not possible where sub-sector 6024 is the main focus.

Methodology and analyses

To prepare the consolidated report on the road transport sector and the sub-sector freight transport by road, the national reports of all 15 Member States were used, based on a literature review as well as on quantitative and qualitative analyses of national data and information. It was known in advance that not all Member States would be able to provide the information requested in a quantitative way and/or at the level of 6024 (or even at the level of 602).

Literature review:

The literature review was conducted for the sector road transport using the following search items:

- working conditions, and/or
- employment status, and/or
- economic factors, and/or
- prevention or intervention, and/or
- health and safety.

This was then used to characterise the sector and complete the quantitative information collected in the national reports. The literature search goes back about five years from 2002 so should cover the period 1997-2002.

Quantitative analyses:

The national partners made substantial use of:

- national registers on the economic situation of the sector, on exposure and/or outcome (e.g. accidents, occupational diseases, disability, mortality, etc);
- national survey data on conditions of work and employment.

Qualitative analyses:

Interviews were conducted with relevant representatives at national and EU level:

- employers' organisations in the sector of road transport or freight transport by road;
- trade unions in the sector;
- national sector organisations.

Abbreviations

The information by country will be abbreviated in tables and figures as follows:

A	=	Austria
B	=	Belgium
D	=	Germany
DK	=	Denmark
E	=	Spain
EL	=	Greece
FIN	=	Finland
F	=	France
I	=	Italy
IRL	=	Ireland
L	=	Luxembourg
NL	=	the Netherlands
P	=	Portugal
S	=	Sweden
UK	=	United Kingdom

Report structure

The information presented in this report is mainly based on the 15 national reports on 'Quality of work and employment in the transport sector', particularly focusing on freight transport by road. This report first outlines the sector characteristics, such as the economic and labour market situation, trends and changes in the road transport sector and freight transport by road. Chapter two describes the quality of work in the sector and the outcomes (e.g. occupational risks, accidents,

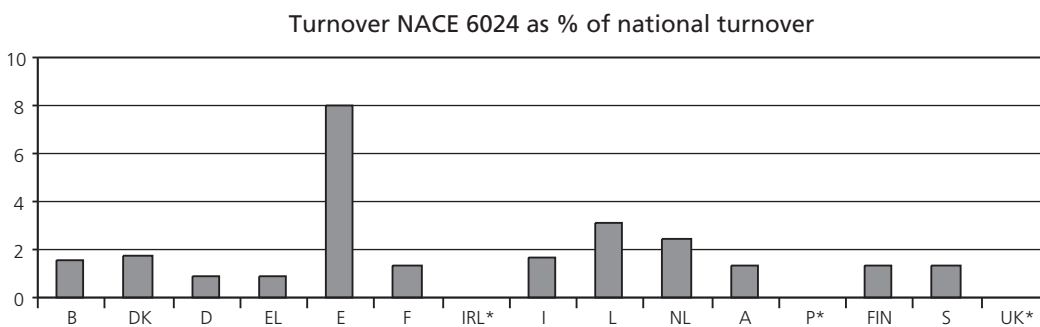
diseases, absenteeism and disability), as well as access to social protection/security. Chapter three provides information about policies such as collective agreements and other instruments regarding the improvement of quality of work in the sector. Chapter four presents the views of employer, employee and branch organisations on issues and challenges in the sector. It includes an overview of issues of consent and dissent between the different parties. The final chapter (five) discusses the trends and issues for the future.

Economic characteristics

Turnover

Much information appears to be available on the economic situation of the transport sector in all countries except for Ireland, Portugal and the UK. For almost all countries, data were available for freight transport by road (NACE 6024). Figure 1 presents the turnover of freight transport by road as a percentage of national turnover. The percentages range from 0.8% (Germany) to 7.9% (Spain). For most countries, the percentage lies between 1% and 2%.

Figure 1 Turnover of freight transport by road as a percentage of national turnover



* no information available

Source: national reports

In most of the national reports, freight transport by road (6024) was presented as the largest part of the road transport sector (602). The figures presented show that in Denmark freight transport by road accounts for 95% of all freight transport; in the UK and Spain the figure is about 80%, and in Luxembourg 74%. Turnover of the transport of persons sector (6021–6023) was considerably lower in almost all countries than that of freight transport by road. In other words, in many countries the contribution to GDP was much higher for freight transport by road than for transport of persons.

In most European countries, except Denmark, turnover of the freight sector was increasing until recently. The rise in turnover in the freight sector generally was comparable with the national rise in turnover. In Germany, however, freight turnover was higher than the national average, whereas in Finland it has been lower than the national average since 1995. In Portugal, the sector shows decreasing figures since 1997.

In several countries, like France, the Netherlands, Portugal and Sweden, the increase in turnover of transport of persons has been greater than the increase in turnover of freight transport by road, although the absolute turnover figures remain much higher in freight transport by road. The processes behind the increase in turnover in freight transport might have been somewhat different in the different EU countries. In France, for example, the growth appears to be much more related to an increasing long-distance (intercity) transport rather than local freight transport. In the UK, recent years have seen a move away from 'own account' operations to 'hire and reward'¹ (the latter now carrying three quarters of the tonnage). Reasons for this appear to be a reduction in capital

¹ Road haulage and distribution is the main business activity of 'hire and reward' companies, who move goods for others under contract. 'Own account' transport operations are companies who provide for their own transport but whose main activity is not transport but retail or catering, e.g.

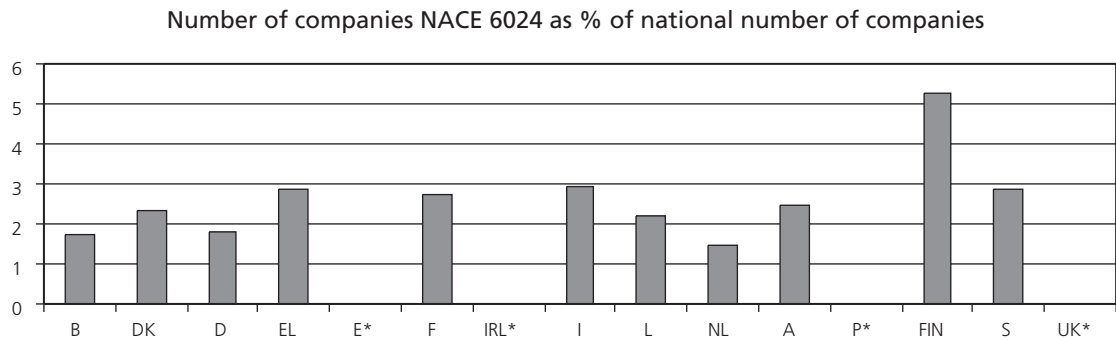
invested in transport, a more productive use of labour, and an increasing separation of drivers from the company's workforce as a whole.

The decrease in turnover in freight transport by road in the last few years, as reported in many national reports, is associated with the general economic relapse in Europe. The freight sector appears to be quite sensitive to economic change. The early relapse in turnover in Finland compared with the overall national figures is also due to the fact that an ever larger proportion of production processes involve high technology, with less need for transport. In Finland, freight transport by road is traditionally tied to forestry.

Number and size of companies

Figure 2 presents the number of companies in freight transport by road. The percentage of companies in freight transport by road ranges from almost 2% to 5% of each country's total number of companies.²

Figure 2 Number of companies in freight transport by road as % of the national number of companies



* no information available

As was the case for turnover, the number of companies in freight transport by road outnumbers the number of companies in transport of persons. Freight transport constitutes from 61% (Sweden) to 81% (Spain) of the number of companies in the transport by land (602) sector.

In most of the European countries, the number of companies has been rising, together with the sector turnover. The period studied was throughout the 1990s so, in principle, dated from before the start of the most recent recession, though the period was not exactly the same for each Member State. The transport of persons sector had fewer companies than freight transport, but the rate of growth was larger.

In Denmark, Sweden and Germany, however, there was a reduction in the number of companies. Since the turnover in Denmark and Sweden did not decrease, the reduction should be attributed to a consolidation of the sector. It appears that in Germany a more general and complex

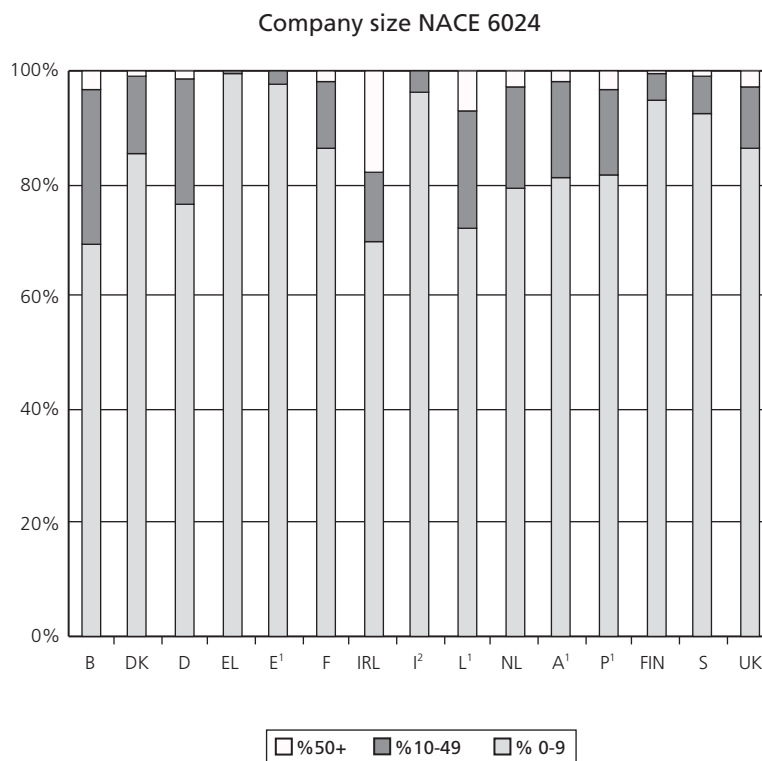
² In some countries, information at a higher NACE level was available. For example, in Spain, it was clear that about 7.6% of companies were working under NACE 602 (road transport, in which both transport of freight and persons is included).

restructuring is responsible for the changes. Outsourcing, sub-contracting and self-employment are significant issues for the sector in Germany. Growing international competition appears to be one of the driving forces.

For almost all countries, the economic recession is associated with a decline in the number of companies in freight transport by road.

Freight transport by road is a sector with many small companies (see Figure 3). Differences exist between the European countries but 65% to over 95% of the companies have 0-9 employees. In most countries, small companies are over-represented in this sector when compared with the national average.

Figure 3 Company size in freight transport by road (%)



¹ NACE 602

² NACE 60

Within this size category of 0-9 employees are included companies with no employees (self-employed with no employees). As far as information is available from the national reports, the percentage of companies without employees can be very different in the European countries, ranging from about 6% (Finland) to 45% (Sweden). In Finland, Sweden and Luxembourg, these percentages are somewhat lower than the national average for self-employed with no employees. In other countries, however, these percentages are equal to the national average (German and UK reports), and sometimes even somewhat higher (Danish report).

Where information is available, companies in transport of persons can be larger than companies in freight transport, although the overall size distribution in the transport of persons sub-sector is comparable to the size distribution in the freight transport sub-sector. An exception is Sweden, where nine out of 10 passenger transport companies are taxi operations of whom a large number appear to be self-employed without employees.

In general, it can be concluded that transport by land, and particularly freight transport by road, is a small company sector, with most companies having fewer than 10 employees. The rest of the companies are medium-sized; and there are only a few companies with more than 200 employees.

The percentage of bankruptcies in the transport sector, and particularly freight transport by road appears to be somewhat higher than the national average in most of the European countries, with – in some countries – indications of a significant recent increase (e.g. German report). One of the reasons for the bankruptcies in the transport sector is the shortage of professional skilled personnel. People have too little knowledge of cost accounting and financial policy, have insufficient experience and inadequate organisational skills. Also, their starting capital is too low. (Belgian report)

In most European countries, the bankruptcies show a downward trend from the beginning of the 1990s until about the year 2000. This downward trend was equal (e.g. Italian report) or even greater than the national average (e.g. French and Dutch report).

Until the recent economic recession, the number of new companies appeared to match or exceed the number of bankruptcies, since the sector overall has grown.

Public or private

In most countries, freight transport mainly consists of private companies. The transport of persons generally consists of both private and public companies. Taxi's are typically private companies within the transport of persons sub-sector, whereas bus transport is often largely public. Finland is an exception to this since most of the bus transport is also private. In several countries, the public transport sector incorporates both public and private companies.

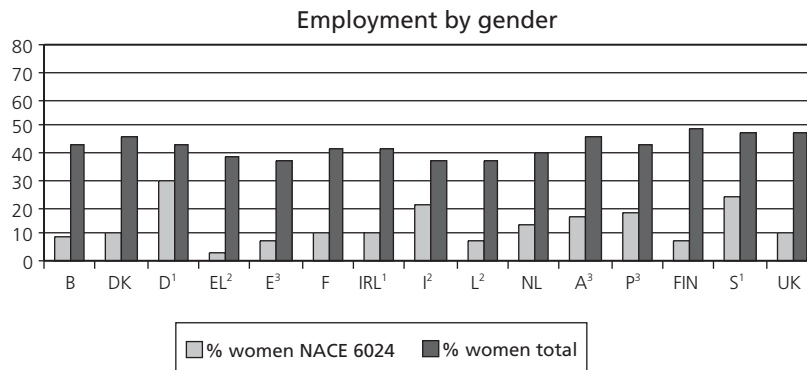
Labour market

The multiple NACE levels in the following figures do not allow for comparison between countries but they provide a good overview of the sector.

Gender

Figure 4 presents the percentage of women working in the freight transport by road sector. Although not all countries provided data at the 4-digit level (freight transport by road), it is clear that the transport sector is male-dominated.

Figure 4 Percentage of women working in freight transport by road, compared with national figures



¹ NACE 1

² NACE 60

³ NACE 602

The percentages for women appear to be lowest in freight transport by road, and are particularly low among drivers. Those few women who do work in this sub-sector work in other positions. The percentage of women is somewhat larger in transport of persons and larger again in the rest of the sector. Several research based reasons were mentioned as to why women are so poorly represented in this sector, particularly in freight sector by road. The reasons given were that:

- the work is hard to combine with family life;
- the physical workload is high;
- it requires spending too long away from home. (Belgian and UK national reports)

The percentage of women working in the transport sector and particularly in freight transport by road, although low, has remained stable over the years.

Age and seniority

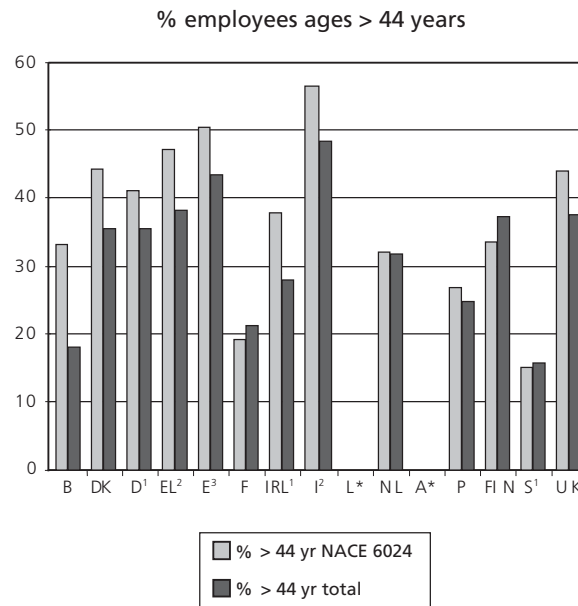
In general, the transport sector, including freight transport by road, has relatively few younger and relatively many older employees (see Figure 5).

Some country reports, particularly those from Finland and Sweden, reported fewer older workers in freight transport. In general, the employees in transport of persons in particular are older.

Nonetheless, working in the transport sector is not generally recognised as an ‘old man’s job’. It might be expected that older workers may develop health problems and leave the job (e.g. the German national report). The data as presented here may also underestimate the percentage of workers below the age of 44 years, particularly in freight transport, as the self-employed are not included in the figures. It is to be expected that the self-employed are generally younger drivers, since older drivers may want to take less (financial, social benefit) risk themselves, and seek work as an employee.

Very young workers, on the other hand, are not expected to have the training to drive large vehicles nor the capital to own such vehicles, as would self-employed drivers (e.g. the UK national report).

Figure 5 Percentage of employees of more than 44 years of age³



* no data available

¹ NACE I

² NACE 60

³ NACE 602

Another reason that the sector seems relatively ‘old’ may be that several of the countries could not provide data for exclusively freight transport (4-digit level). There is evidence that workers in transport of persons are generally older than those working in freight transport. As they get older, drivers tend to leave the heavy sector of freight transport to work in the, often public, transport of persons sector where they have better access to social security and health care.

Work experience (seniority) in the sector is not often mentioned in the national reports. Where data on seniority are available (e.g. Portugal, Denmark), they indicate that the transport sector, and particularly freight transport by road, has a low, though increasing, level of seniority. It is interpreted that work experience must be attractive to the sector therefore. The low levels of experience also indicate a risk factor for keeping a business going strong in a highly competitive and increasingly international market.

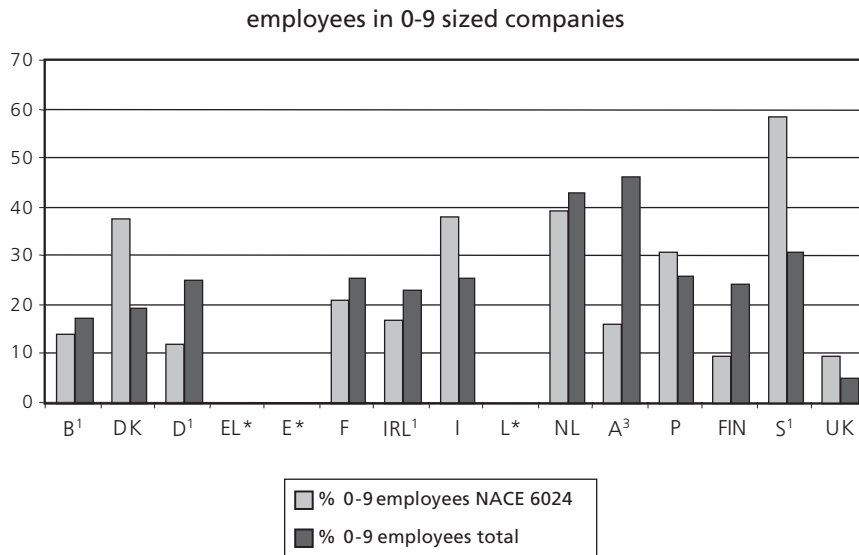
Company size

Figure 6 reports on the employee distribution by company size. In contrast to Figure 3 where the company percentages are given, Figure 6 presents the percentage of employees working in companies of 0-9 employees. In general, the transport sector, and particularly freight transport by road, is a sector of small companies in many European countries, except in Finland, France and the Netherlands. The number of employees working in companies of 0-9 employees is relatively large. In those countries where this is not the case (Finland, France and the Netherlands), most

³ For some countries, this age boundary could not be put at 44/45 years of age, where data of the sector and national datasets may refer to another figure, such as 40+ or 50+.

employees were found to work in the next size group of 10 to 50 employees (not shown in the figure), i.e. medium-sized companies. As in previous figures, several countries can only provide data at a more aggregate level.

Figure 6 Percentage of employees in small (0-9 employee) companies



* no data available

¹ NACE I

² NACE 60

³ NACE 602

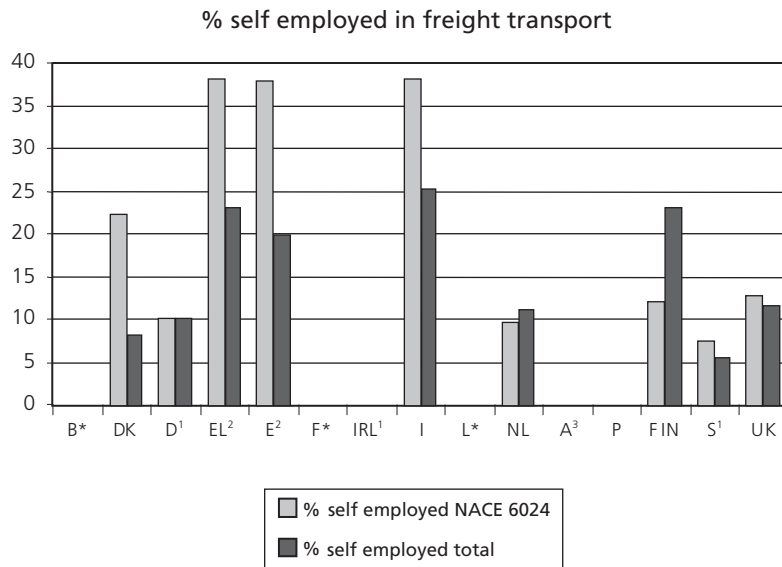
In general, it is concluded that the transport sector, and particularly freight transport by road, is a small company sector, and many employees work in companies of up to 10 employees. The transport of persons generally is associated with larger companies, and employees tend to work in larger, though still mainly medium-sized companies. In some countries (e.g. Italy), more employees in the transport of persons sub-sector work in companies of 100+ employees, compared with the national average.

Employee contracts and self-employment

The status of the profession varies very much among the Member States. Figure 7 illustrates the percentage of self-employed. This information is not available in many countries, and may cover more sub-sectors within transport. It can, however, be seen that, in several countries where this information is available, the percentage of self-employed is relatively large.

In several national reports, mention is made of employers and companies who try to circumvent employment and social security legislation, in order to reduce costs as much as possible in this highly competitive sector. Two examples of this were outlined in the Austrian report.

Figure 7 Self-employed in (freight) transport and nationwide



* no data available

¹ NACE I

² NACE 60

³ NACE 602

Box 1 Example from Austria

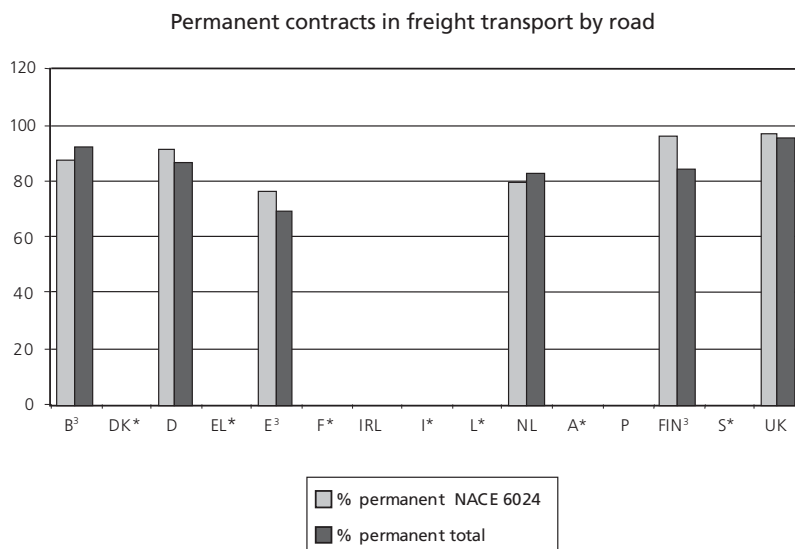
In the Austrian report, the issue of false self-employment is raised: ‘One such type received particular public attention in Austria in early 2002. The so-called ‘quiet partnership’ model was developed and deployed by one of Austria’s largest road haulage companies with more than 1,000 trucks – more than 400 of them located in Austria – and an annual turnover of €196 million.

In this model the driver, as a so-called silent partner, acquires a share of the company by signing over his truck as company property. Since most drivers do not have their own truck, the owner of the road haulage company – through a legally separate firm – offers them rental contracts for trucks. Through this arrangement, the truck remains the property and at the disposal of the company, while the truck driver officially becomes an independent entrepreneur, even if he receives the same orders from management as dependent employees do. Moreover, while employees are paid according to hours or distances travelled, silent partners receive a share of the profits, leaving them with the risks, but only a small part of the gains. According to the Austrian Chamber of Labour, after deduction of taxes and social security contributions, some ‘silent partners’ earned less than 56 cents per hour worked. As some former silent partners are currently suing the company, the courts will have to decide if the ‘quiet partnership’ model corresponds to the law, or if it is an illegal attempt to circumvent employment legislation and/or to avoid application for mandatory haulage licences. Union representatives have also stressed that victims are not only drivers who are deprived of money but also public health insurance and pension funds which lose contributions that would have been mandatory for regular dependent employees.’

Box 2 Example from Austria

Another example from Austria is the employment of trainees from eastern Europe. A specific agreement in Austria authorises trainees between 18 and 35 years of age to complete training in Austria for the duration of between six and 18 months. In the Austrian report, mention is made of abuse of these trainees, by using them as professional truck drivers. It appears that some companies almost exclusively operate with Hungarian trainees. The trainees are paid considerably lower wages than would be required by the collective agreement, if based on distance travelled or tons carried.

Apart from the example on the employment of trainees from outside the EU as mentioned in the Austrian report, there is no clear evidence that many non-EU employees are working in the sector. As far as official data are available in the European countries, they point to the fact that in general particularly few foreign, let alone non-EU, employees are working in the transport sector (e.g. UK report). In the Netherlands and Belgium, non-EU employees make up only a small percentage of the transport sector (1.7%, 1.4%). This is comparable with their national statistics on non-EU workers. In Germany, the transport sector has an equal percentage of foreign workers (7.6%), compared to the national figure (7.2%).

Figure 8 Permanent contracts in freight transport by road

* no data available

¹ NACE I

² NACE 60

³ NACE 602

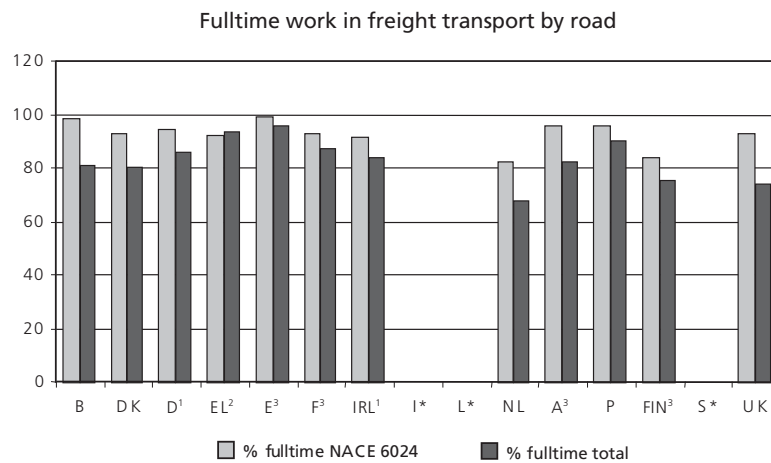
The number of foreign workers in Luxembourg is low (15%), compared with the national figure (27%). There are, however, an increasing number of 'frontier workers', i.e. coming from neighbouring countries. A number of these workers work in the transport sector (41%, national figure: 35%). This figure has multiplied by a factor of five since 1983. The relatively high percentage may be to do with the fact that one does not need a high level of education to work in this sector. Also, working abroad makes one less subject to national taxes, and makes it easier to maximise the opportunities to earn extra money, legally or illegally.

Figure 8 shows the percentages of employees who have a permanent contract. Where data are available, it is clear that employees in this sector usually have a permanent contract. In general, permanent contracts in freight transport by road are more frequent than is the case nationwide. In transport of persons, the percentage of permanent contracts is often lower, compared with freight transport by road. This might be due to the fact that women are employed more often in the other transport sub-sectors. Women do not have as high a proportion of permanent contracts.

Fulltime and part-time work

Figure 9 presents the percentage of fulltime work in freight transport by road. It shows that relatively many employees work fulltime.

Figure 9 Fulltime work in freight transport by road



* no data available

¹ NACE I

² NACE 60

³ NACE 602

The percentage of part-time work is higher in the other sub-sectors of transport, such as the transport of persons. This may again have to do with the low percentage of women in freight transport by road. More women work part-time. The number of part-time work appears to be increasing in most EU countries (though not in all, e.g. not in the UK), both in the transport sector as well as nationwide.

Educational level

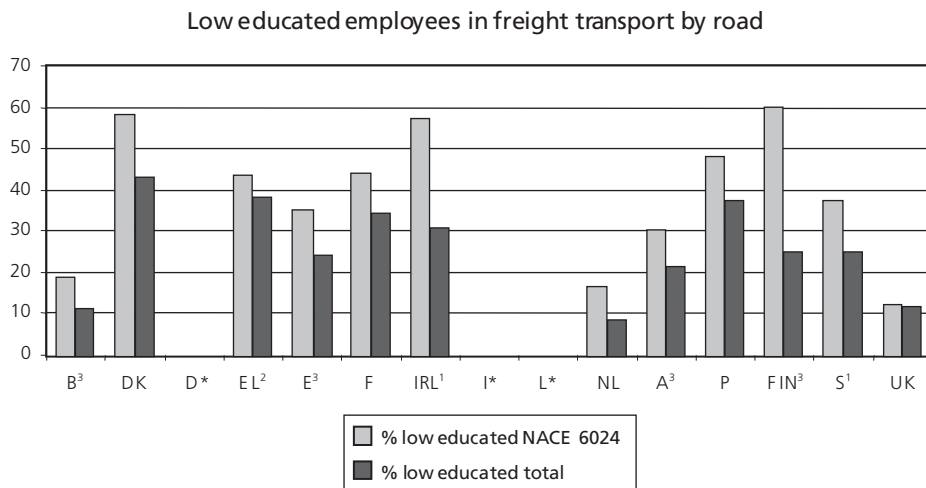
The educational level appears to be rather low in the sector. The breakdown by educational level is quite different in the various national reports but, in many of the reports, some quantitative value has been provided for the educational level in the sector. From this, a figure was constructed to indicate the percentage of employees in the sector in the lowest educational category from each national report. This may indicate basic or primary schooling, zero years of education, or a maximum of four years of education.

The national reference for educational level is of the same nature as that for freight transport by road (or road transport). In Figure 10, therefore, it is not the percentages themselves that are

relevant, but the consistent difference between the sector and the national average. Despite the fact that it was not possible for all countries to provide data at a 4-digit level, Figure 10 clearly illustrates that more employees in the freight transport or transport sector are in the lowest regular educational level than is the case for the nationwide average.

For some occupations in the sector, such as drivers, particularly drivers who transport dangerous substances, planners, technical maintenance personnel and management, additional education is necessary. Since the sector has changed over the last decades due to technological advances, it is to be expected that working with new technological devices also demands specific education. One problem, as noted by the social partners, is that training or continuous education does not belong to the sector culture. This may explain why there is a shortage of personnel in occupational groups for which additional training and education are vital in order to keep up to date.

Figure 10 Educational level in freight transport



* no data available

¹ NACE I

² NACE 60

³ NACE 602

Employment, vacancies and a second job

Employment has increased in the transport sector in general, as well as in freight transport by road. Unemployment is somewhat less in the transport sector than the average. Despite a healthy growth in employment in the EU countries, excess demand has led to attempts to hire additional personnel, particularly drivers, in many countries. The shortage of good management and technical maintenance workers too has been noted. On the other hand, the demand for warehouse personnel is decreasing.

Information on the number of vacancies is either absent in the national reports or is presented in varying forms. The percentage of vacancies in freight transport by road is reported to be high (the Netherlands) while relatively few vacancies remain unfilled in freight transport, as well as in the transport sector as a whole. The most acute shortage is mainly in the driving profession. In the Belgian report, the causes of the high number of open vacancies in the driving profession are:

- a shortage of motivated personnel;
- insufficient qualifications (62% of companies have difficulty in finding experienced personnel);
- a large number of the companies (41%) have difficulty in training personnel (e.g. due to irregular hours);
- the negative image of the sector.

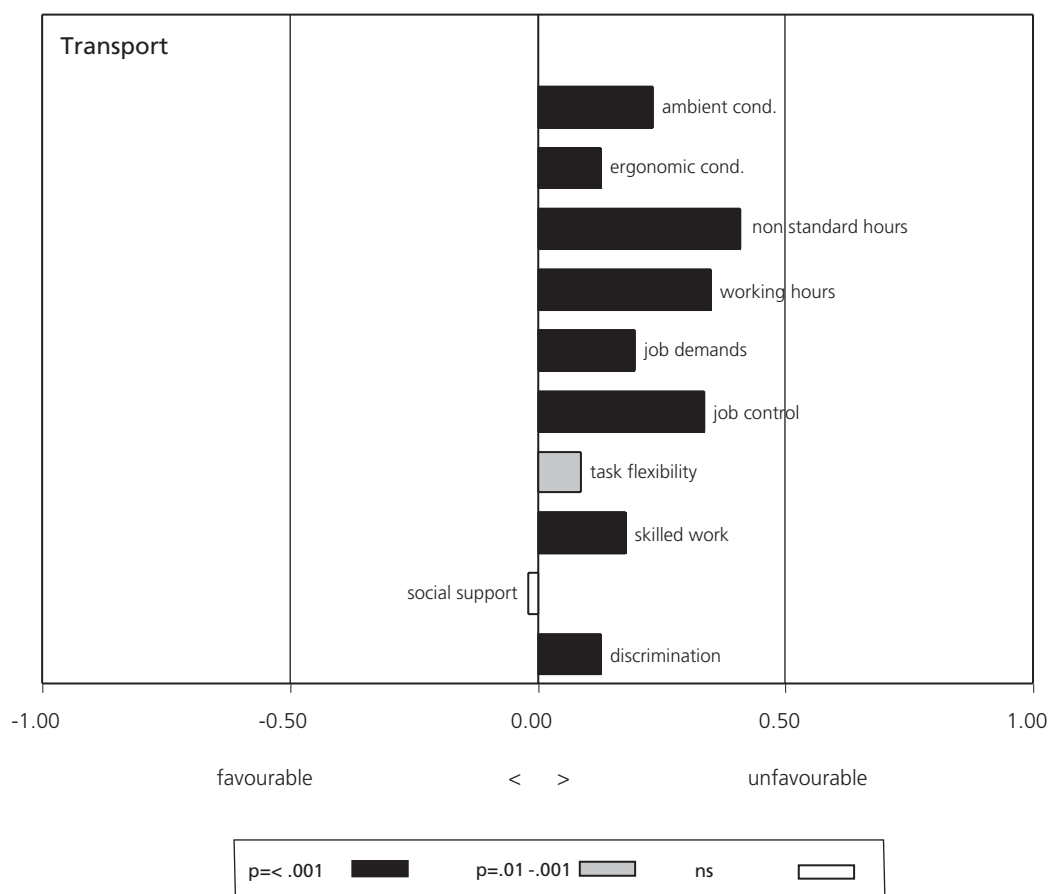
Relatively few employees in the transport sector, and particularly in freight transport, have a second job, though this appears to be increasing (Denmark). In Portugal, fewer people than the average left the transport sector. Although relatively few people were fired in the transport sector (3.5% as compared with 12% nationwide), many more people left voluntarily (66% as compared with 49% nationwide). Also, many people left the sector because their positions became redundant (14% as compared with 10% nationwide).

This chapter discusses the main aspects regarding quality of work and employment in the sector. First, information is presented as it has been gathered in the European Survey 2000 on the transport sector as a whole. Then, the data collected for the transport sector, and particularly for the freight transport by road sub-sector, is discussed with a view to the quality of work and health in the sector.

General perspective

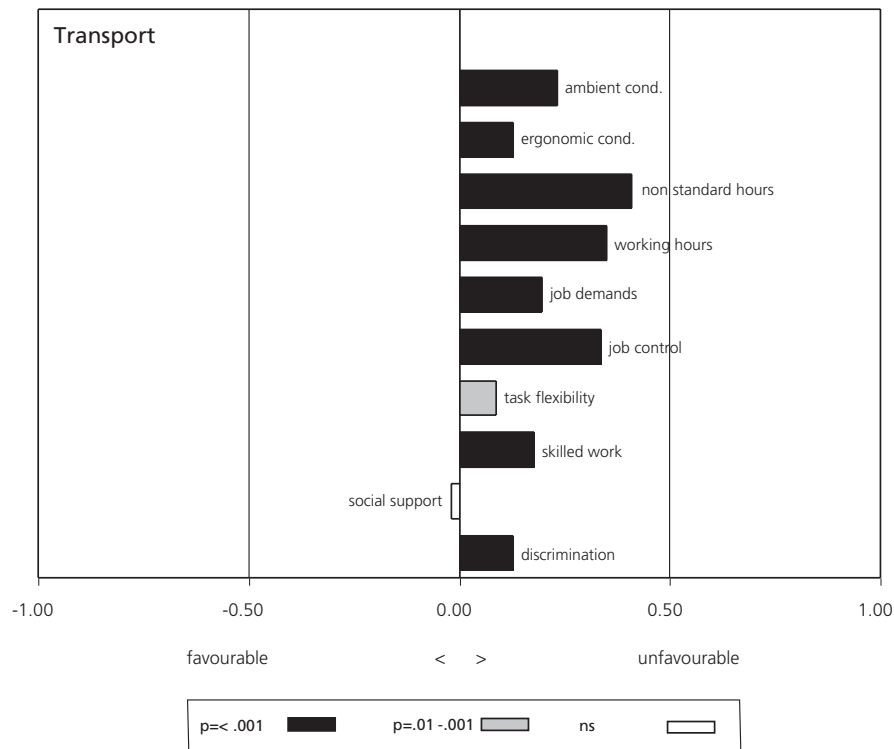
Figure 11 presents the general profile of the transport sector's working conditions in EU countries in the year 2000. The profile is unfavourable in almost all potential risk dimensions identified, compared with the average of all other sectors (Z-transformed figures; EU average is 0). The sector is at risk in terms of ambient conditions (noise, vapours, danger, vibrations, high/low temperatures, radiation), ergonomic conditions, working non-standard hours and long working hours, as well as organisational risks such as heavy job demands, lack of control and inability to develop one's skills at work. The unfavourable position on 'discrimination' means that workers in the transport sector face greater than average levels of physical violence, harassment and discrimination from colleagues and the public/passengers.

Figure 11 General profile of working conditions in the transport sector



Source: European Foundation for the Improvement of Living and Working Conditions, European Survey 2000

Figure 12 Changes in the general profile of working conditions in the transport sector



Source: European Foundation for the Improvement of Living and Working Conditions, European Survey 2000

Figure 12 shows the recent change in risk dimensions as reported in the Foundation surveys of 1995 and 2000. It can be seen that, over the last five years, the transport sector has been moving towards more organisational risks like poor job control and unskilled work, indicating that workers are increasingly unable to control their own work and to develop skills and knowledge in the sector.

A breakdown to a 4-digit level was not feasible within the Foundation surveys. The following sections will examine the national reports to consider what kind of information is available on the quality of work and health outcomes for this sector and particularly for freight transport by road.

Physical work environment

The physical work environment in the sector is characterised by a specific set of ambient, ergonomic and safety conditions, and by access to specific equipment and technology. Only limited quantitative data were available regarding these issues in the freight transport by road sector. Nevertheless, based on qualitative information, a rather homogeneous picture emerges as to what are the main physical risk factors in the sector. The most significant risks facing employees in the sector as mentioned in the national reports are described below.

Noise

Exposure to excessive noise appears to be a problem in several countries, such as Austria, Belgium, Denmark (though not apparent in national statistics), Finland, France, Spain and Sweden. In addition to the vehicle itself as a source of noise, traffic and machinery at delivery sites contribute to a noisy work environment.

Several countries report developments aimed at improving the comfort of drivers, including insulation of cabins and other techniques for noise control. In some countries, noise is no longer perceived as a particular risk factor.

Vibrations

Without exception, if data were available, the country reports point to the risk of vibrations of the entire body. This is regarded as a widespread problem which can lead to the development of back problems, especially when combined with prolonged periods of sitting.

Several reports mention measures to tackle the problem of vibrations, such as the development and introduction of ergonomically designed seats which prevent vibration-induced back problems. In Denmark, a guide has been produced aimed at the detection and prevention of body vibrations.

Lighting

In Finland, the importance of proper lighting is emphasised in relation to preventing work-related accidents. This is due in particular to their short daylight time in winter.

Extreme temperatures and temperature fluctuations

In the Nordic countries, working in extreme cold temperatures is regarded as a specific negative aspect of the physical work environment of drivers working in road transport of goods. Other countries also point to the issue of exposure to extreme climate conditions. An even more widespread problem in the sector is exposure to variations in temperature. Musculoskeletal injuries are more likely to occur, especially when performing heavy physical loading and unloading activities in a cold environment, after a long period of sitting in a warm cabin.

Several countries mention specific risks related to climate for drivers in public transport. In Greece, for example, exposure to excessive heat and variable workplace temperatures contribute to poor ambient conditions for urban transport drivers. In Denmark and Finland, exposure to draught is mentioned as a specific risk for public transport drivers.

Air pollutants

Exposure to exhaust fumes is perceived as a problem in a number of countries. Drivers are frequently exposed to these fumes, for example at bus stops and at loading or unloading terminals. Drivers are especially vulnerable when loading and unloading trucks in poorly ventilated areas.

Atmospheric pollutants, such as carbon monoxide, ozone and nitrogen oxides may cause serious adverse health effects for drivers. For instance, carbon monoxide affects the central nervous system by depriving the body of oxygen. It also has certain cardiovascular effects. Exposure to high levels of ozone may cause problems for the respiratory system.

The Belgian report indicates that the combination of exposure fumes and smoking increases the risk of developing respiratory problems. It also mentions that respiration problems may occur when fumes are attracted to the ventilation system of a truck.

Although a further reduction of truck emissions is still needed, major improvements have already been made. The Luxembourg report refers to a paper by the International Road Transport Union (1998) which showed that, since 1990, truck emissions (carbon monoxide, hydrocarbons, nitrogen

oxides) had been cut by more than half⁴, thanks to huge investments in new technology. The emission of particles has been reduced by more than 80%.

Transport of hazardous goods/handling harmful substances

Handling harmful materials is not perceived as a key risk factor in most of the EU Member States. The transport of hazardous goods is bound by strict (ADR) legislation and drivers receive extra training.

Exact figures on the number of employees who receive this training are not available. Research in the Netherlands, however, has shown that, in 1998, 2000 and 2002, a third of the employees working with (not necessarily transporting) dangerous substances reported that they had not received any information on how to handle these substances.

In the Finnish report, exposure to harmful chemicals is perceived as a specific risk. This exposure results from, for instance, (un)loading and cleaning containers and vehicles, handling chemicals for on-board toilets and the disposal of refuse. Drivers are also at risk when refuelling their vehicle.

Loading and unloading vehicles

Drivers are exposed to heavy lifting tasks while loading and unloading their vehicle. The overall time spent on performing this lifting task, however, is relatively low compared with the national average in most countries. Also, several countries report there is a clear trend towards less physically strenuous work. For example, the Irish report mentions that heavy lifting has been removed from the industry by mechanisation of the sector.

In the UK, automated warehouses are increasing in number which leads to less physically demanding work for drivers. Conditions at delivery sites, however, may be less controlled and therefore a source of greater risk. The Dutch report mentions that heavy lifting is less common than before, because of the development of moving cargo floors in trucks, table jacks, and instructions on correct lifting and carrying techniques. These efforts however, did not result in fewer back problems and cases of absenteeism among drivers.

Overall, heavy lifting, strenuous work postures and work that includes pulling and/or pushing are still considered widespread problems in the sector. Lifting equipment may have been improved at the depots but the delivery point may still require heavy or awkward lifting. Although improvements have been made, in particular by the larger distribution companies, these have not been implemented across the board. Because strenuous work often immediately follows a period of relative physical inactivity, musculoskeletal injuries are likely to occur. Exposure to cold temperatures when loading and unloading and working under time pressure may also increase the risk of injury.

Apart from drivers, other risk groups facing a heavy physical workload are warehouse/terminal workers and maintenance personnel, mainly because of uncomfortable work postures and heavy lifting. There are also several other risks associated with the loading and unloading of vehicles. These risks include working on slippery surfaces, falling, working with forklifts, and the risk of being hit by falling objects.

⁴ Situation 1996. It is estimated that by now emissions would be reduced by more than 70% (compared with 1990).

The Belgian report refers to research which shows that nearly half of the reported occupational accidents were related to loading and unloading activities.

Prolonged sitting

Despite significant ergonomic improvements in truck equipment, disease statistics related to back problems and musculoskeletal disorders remain high. It is often argued that the improvements may not yet be long enough in place to have had a measurable impact on disease statistics. Secondly, long driving hours remain a major characteristic of the sector. Under these conditions, major improvements in the disease statistics are unlikely to occur.

Because the work of drivers is mainly sedentary, there is an increased risk of suffering from musculoskeletal disorders of the (lower) back. Employees often have to work in a monotonous sitting posture for many hours. For example, in Denmark, 90% of the employees work in a sitting position for at least three quarters of their working time.

Long hours of sitting can lead to back muscle fatigue which can develop into serious back problems. The Belgian, Luxembourg and Swedish reports mention that the risk increases further when prolonged sitting is combined with truck vibrations.

Several countries report important improvements regarding ergonomic conditions. In Greece, a continuing programme of replacement of public transport vehicles has greatly improved ergonomic conditions for drivers. Other countries like Belgium, Germany, Ireland, Italy, Luxembourg, the Netherlands and Spain, report significant improvements in the development of ergonomically designed seats and/or cabins. In the Netherlands, a quality mark for seats and cabins of trucks has been developed. Seats and cabins with this quality mark meet specific legal ergonomic standards.

It is suggested that simply improving the design of seats will not help unless drivers also adopt a correct sitting posture and take active rest breaks. Finally, older workers appear to be more at risk than younger workers.

Road safety

Road safety is mentioned as an important issue by most EU Member States (if information was available). Obviously, drivers have a higher risk of being involved in a traffic accident because most of their working time is spent on the road. Driving at night, under bad weather conditions or in heavy traffic increases this risk.

Road safety conditions appear to have improved although, in some southern countries (e.g. Italy), it is still an issue. According to the International Road Transport Union (1998), the number of people killed or injured in accidents involving trucks has been reduced by 20% in the last decade, while the number of kilometres driven by trucks increased by 40% (see also section on Health outcomes).

A specific problem mentioned in the French report is the shortage of safe parking (resting) facilities, which results in drivers having to stop (to comply with regulations for rest periods and breaks) in dangerous positions.

Equipment and technology

The most important trends regarding access to specific technology are the increased use of mobile phones and on-board computers. Mobile phones have made drivers much more accessible. On-board computers can monitor and control a number of operations of the vehicle. This includes the

driver's work pattern, the maximisation of truck loads and the location of the vehicle (using GPS satellite tracking systems). In the Netherlands, Internet use among trucking companies has increased dramatically from 43% in 1999 to nearly 80% in 2001.

Another important development is the introduction of digital tachographs (using 'smart cards'). Commencing August 2002, there is a 24-month lead-in to the obligatory installation of a digital tachograph in new vehicles (EEC reg. no 2135/98; EC reg. no 1360/2002). The digital tachograph is a more secure and accurate recording and storage device than previous equipment. It primarily records driving and rest times of the driver, but speed, distance travelled and other related parameters are also recorded.

The Belgian report mentions several advantages of the new technologies in road transport. These include increased road safety, being more accessible for family, less administration, more efficient planning and more accurate cost calculations. On the other hand, new applications and systems may create a certain degree of uneasiness, confusion and irritation among drivers. Learning how to operate on-board computers may lead to extra stress (<http://www.eiro.eurofound.eu.int/1999/06/feature/BE9906275F.html>). In Sweden, it is suggested that some safety features may actually result in additional risks for drivers. For example, cruise control devices may reduce drivers' attention and may lead to more serious accidents should a driver fall asleep.

The Finnish report mentions that computer use in general tends to be greater in larger companies.

Overview of risk factors

Table 2 provides an overview of the main risks factors related to the physical work environment in the transport of goods sector, as identified in the country reports. It must be stressed that most reports were not able to cover all issues because quantitative data were unavailable. Some country reports presented qualitative information instead, but not all of them. Therefore, this table should be interpreted with caution. Also, the fact that many risks are identified in some countries (e.g. Finland) does not necessarily mean that work in this country is more dangerous; it may point rather to the particularly extensive research at a national level in the sector.

Table 2 Main risks related to physical work environment

Risk factor	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FI	S	UK
Noise	•	•		•p	•	•	•				•		•	•	•
Vibrations	•	•		•p	•				•	•	•		•	•	•
Lighting													•		
Temperature fluctuations/heat		•		•p		•							•	•	
Emissions/contact dangerous substances	•			•p	•				•				•	•	•
Dust				•p											
Strenuous postures/lifting	•	•g	•						•	•		•	•	•	•
Prolonged sitting	•	•	•						•		•		•	•	•
Repetitive work		•p											•		
Road safety	•	•		•	•			•	•			•	•		•

For countries that provided information on both transport of goods and persons:

•p = transport of persons; •g = transport of goods, • = both sub-sectors

Work organisation

This section describes the organisation of work in the sector. There is no precise definition of the term 'work organisation'. In general, it refers to the way work processes are designed and structured, and it involves areas such as psychological job demands, social-relational aspects of work, job complexity and control over work. These subjects are often referred to as psychosocial factors, and are well recognised as risk factors for psychological strain, health problems and even mortality due to cardiovascular disease. The most important psychosocial risk factors identified in the country reports are presented below.

Work intensity

According to most of the national reports, working under time pressure is common for drivers in freight transport by road. Drivers face increasingly tight delivery schedules that have to fit in with 'just in time' operations. This creates more time pressure for drivers and a constant feeling of being in a hurry. Just in time operations are the result of a clear trend towards higher demands from customers for precision, speed and flexibility in the delivery of goods. Many countries point to the problem of stress because of time pressure triggered by tight deadlines.

Another important source of work pressure and stress, mentioned in the Belgian report, is the increasingly competitive environment in which European road transport companies have to operate. In order to survive in a highly competitive environment, companies have to work more efficiently, provide higher quality services, perform additional tasks and offer features that go well beyond the simple transportation of goods. This widens the nature of the tasks required from truck drivers: tasks traditionally performed by warehouse or stock managers are now taken over by the drivers themselves (<http://www.eiro.eurofound.eu.int/1999/06/feature/BE9906275F.html>). In France, drivers also report that many tasks, which used to be executed by clients during loading and unloading, are now performed by drivers. Also, the fact that the driver has to deliver service to the client, and is the contact person with the client for the company, means that more social skills are expected of the driver. Practising these social skills may seem particularly difficult, especially for older drivers, as they go against the typically solitary nature of the role.

Work pressure is further increased by variable factors such as traffic congestion, waiting times at loading/unloading docks and poor weather conditions. In the Netherlands, restricted delivery times in city centres are also mentioned.

According to the Dutch report, research in the Netherlands showed that work pressure is also particularly high for middle management, planners and technical personnel. For example, the shortage of drivers, limited opening hours of customers and delays increase work pressure for planners. In Finland, a recent study showed that increased pace of work and feelings of stress particularly affected office workers, workers in terminals and maintenance personnel.

In a number of countries, such as Austria and Finland, time pressure appears to be a main reason for difficulties in taking rest breaks and thus disregarding driving time and working time regulations.

Training and learning opportunities

Traditionally, road transport is characterised as a sector with a relatively high percentage of unskilled jobs and little learning opportunities. Access to supplementary training is limited.

Several countries point to the lack of training opportunities as a key problem in road transport. For example, in Belgium, a recent study showed that almost 70% of the surveyed transport companies reported that it is not possible to follow additional courses. In Denmark, a 2002 survey showed that 69% of the employees in transport of persons and 73% in freight transport reported that they had not received supplementary training within the last year; the national average is 50%. For those who did receive supplementary training, the number of training days was relatively limited. Fewer than 10% received training for at least five days in the last year, compared with 25% nationally. This is similar to Swedish figures. The large number of small companies and self-employed workers, with low profit rates, may partly explain the limited training opportunities in the sector.

In Denmark and the Netherlands, attention is drawn to the high level of monotonous work for drivers in public transport. In Denmark, the number of public transport drivers reporting lack of creativity and initiative in their work was almost three times higher than the national average.

Although the sector has a poor record on driver training, the situation appears to be changing. In a number of countries, such as France, Portugal and the UK, access to training has increased in recent years. There is a marked change in the willingness of employers to fund training of their employees. In Spain, a remarkable increase in educational levels took place throughout the 1990s in the road transport sector, as the share of workers with only a primary education almost halved between 1991 and 2001.

An important development at European level is the proposed introduction of an EU directive on the initial qualification and periodic training of drivers of certain road vehicles for the carriage of goods or passengers. Under these rules, training of drivers would be a legal requirement throughout all EU Member States. Up to now, this training has been legally required only in France and the Netherlands. The primary aim of the legislation is to improve road safety and provide drivers with a better knowledge of the health and safety issues associated with driving. The impact of a directive on the training of drivers will be far-reaching. Drivers-to-be will have to complete a programme of basic training before becoming professional drivers. Existing drivers will be required to participate in 'continuous training' every few years.

The growing need for drivers to have customer service skills is underlined in several reports. Also, the implementation of new technology requires new skills of drivers, and therefore an increasing focus on supplementary training must be expected. An overview of training topics in which companies are interested is presented in the Belgian report. The most important topics for drivers include: preventive/defensive driving, economically efficient driving, small maintenance, driving times and tachograph and client service. For management, important topics are: quality certification, logistics, human resources, client service and marketing.

Finally, the development of traditional transport companies towards more logistics oriented companies may involve more tasks for drivers.

Job autonomy

The degree of control which workers exercise over their work is limited in road transport. In most EU Member States, the reported job autonomy is clearly lower than the national average. Not being able to influence work is a serious risk factor that may lead to stress-related health problems, especially when this lack of autonomy is combined with high time pressure (Karasek and Theorell, 1990).

The work environment of drivers, in particular, is characterised as being heavily controlled. It may seem that freight transport drivers have a high level of decision latitude because they work alone, without being directly controlled by a supervisor. In reality, however, they exercise little influence over the organisation of their work. Control over work pace and workload are particularly restricted. The work is constrained by tight delivery schedules. Opportunities to discuss any work problems at regular meetings are restricted. Also, drivers are seldom involved in the planning process. According to the Spanish report, many drivers state that their work pace is highly dependent on waiting times for loading and unloading. Just in time deliveries lead to even less flexibility for drivers to set work pace and plan their own work.

In road transport of persons, work autonomy seems even lower. Whereas working hours are more or less flexible in freight road transport, working hours and activities are to a large extent predetermined for public transport drivers. For example, in Sweden, nearly 90% of bus and tram drivers reported that they can seldom decide when various tasks should be done, while about 85% reported seldom being involved in planning their own work.

The Foundation data presented at the beginning of this chapter indicate that the autonomy of drivers has been decreasing since 1995. This is supported by some of the national findings. This development may be due to the organisational and technological changes that have taken place. Employers and planners can track down a driver when they want and adjust their schedule to increase efficiency. This may lead to less control by the driver. It may also be so obtrusive that it results in an increased feeling of reduced control.

There are also contrary findings. For example, in Austria, qualitative information suggests that employees working in transport have a high degree of autonomy in their work. In fact, this is one of the main reasons for becoming a truck driver. At the same time, however, it is also mentioned that many drivers report being pressured by their employers. Research in Portugal suggests that employees in road transport have high levels of autonomy with regard to choosing rest time and holidays. Also, more employees report having a more flexible schedule than the national average.

In Spain, the self-employed report a more self-regulated work pace while, in the Netherlands, autonomy appears to be higher in administrative jobs.

Social interaction and social support

A high percentage of drivers in freight transport by road work in isolation. Both drivers in freight transport by road and transport of persons have few contacts with their colleagues and supervisors. However, there is an obvious difference between transport of freight and persons. Whereas direct customer contact is high among public transport drivers, in freight transport, contact with clients is restricted to loading and unloading activities.

According to the Belgian report, the individual nature of the work is regarded as a positive job characteristic. Many drivers prefer not being controlled by a supervisor all the time. On the other hand, no direct support or reprimand is given when something goes wrong. In the Finnish report, working alone, being unable to communicate with anyone and the lack of workmates are mentioned as factors that contribute to mental fatigue. The UK report also mentions that isolation is an attractive element of the job for some drivers. However, some companies, especially larger ones, may employ 'drivers' mates'. These are usually people too young to drive themselves who help with deliveries.

A direct result of the limited contact between drivers and their colleagues and supervisors is that social support is low. Employees can rarely turn to colleagues or supervisors to receive encouragement or support. Although many countries were not able to present quantitative information on this particular subject, a lack of social support seems to be a significant problem in the sector.

In Denmark, for instance, almost twice as many employees complain about lack of support in the sector, compared with the national average. The Danish Trade Working Environment Council for transport and wholesale has developed a guide on this subject specifically aimed at the road transport sector. In Finland, France and Sweden, attention is drawn to the fact that the amount of support employees receive from management is particularly low.

Social support may act as a buffer to the severe health effects associated with work pressures. As long as employees in the sector lack support, stress risks may rise.

Communication and staff relations

As mentioned above, many employees in road transport are not in daily contact with their supervisors. As a result, problems are seldom brought up for discussion and employees are seldom well-informed about decisions affecting their work.

In Finland, poor communication within companies, poor communication skills of employees, a tense work atmosphere and poor management practices are mentioned as important factors that may lead to greater pressures for drivers. Low quality of management is mentioned in Denmark as well, but only in transport of persons. Compared with national figures, almost twice as many employees (43%) in this sub-sector complain about poor management practices. Again compared with national figures, Dutch freight transport drivers report significantly more conflicts with their boss and/or colleagues. Technical personnel also report significantly more conflicts with their boss, but not with colleagues. In the UK, there is some anecdotal evidence of poor treatment by management of drivers who miss their delivery slots. The Austrian report indicates that road haulage workers often feel pressured by their employer. The Chamber of Labour wants employers to write official orders, so that drivers can prove they were forced to complete a route within a particular time span.

In the French report, attention is drawn to the fact that there is a well-established hierarchy within freight transport by road. At the top of the hierarchy are long distance truck drivers, followed by regional drivers, delivery drivers, personnel working at terminals, etc. Relations not only between employees and management but also between hierarchical subgroups can be tense at times. Drivers report that relations with management tend to be better in large firms than in smaller ones.

Violence, aggression and crime

Because of the frequent direct customer contact, drivers in public transport may be exposed to threats of violence and harassment. Exposure to violence, threats of violence and fear of violence have serious implications for the psychological work environment, health and well-being of the individuals involved. Clearly, violence has negative consequences for the organisations involved too. Possible consequences of exposure to workplace violence are reduced job satisfaction and productivity, increased rates of sick leave and higher staff turnover.

In Denmark, the National Working Environment Authority includes harassment and threats among its special points of attention in the working environment guide for transport of persons. In Sweden, 65% of taxi, bus and tram drivers reported being involved in conflicts with clients/passengers within the last 12 months. This means that drivers in transport of persons were twice as likely to be involved in conflicts, compared with the national average. More than 50% reported being exposed to violence and threats of violence from their supervisor or colleagues. In contrast, 8.5% of the drivers in road transport reported exposure to violence.

Although less prevalent, threats of violence and actual violence are also highly relevant in freight transport by road because of the risk of robberies. Several countries draw attention to the increasing number of truck thefts and physical attacks. The European Conference of Ministers of Transport (2001) published a report on crime in transport, which showed that theft of vehicles increased by 21% between 1995 and 1999. In some countries, up to 1% of vehicles for freight transport are stolen annually. These results indicate that being involved in a robbery is a serious risk factor for drivers in freight transport by road.

In the UK, there are reports of a lack of personal security for drivers in general, with thefts from vehicles and physical attacks, especially in the Calais area. Recently, a survey on assaults and robberies was conducted in Denmark. The results indicate that the most typical after-effects for the victims take the form of psychological injuries and ill-effects. On average, the victims were on sick leave for 54 days because of the effects of a robbery. The survey points to a tendency towards a higher risk of robbery for female drivers.

Another point of attention is the relation between drivers and workers in terminals. In the UK, there is anecdotal evidence of poor treatment by employees who receive the goods when drivers miss delivery slots. The Finnish report mentions that serving too many customers puts a strain on human relations.

Overview of risk factors

Table 3 presents an overview of the main risk factors related to the organisation of work, as mentioned in the EU Member State reports. As in the previous section, it should be stressed that most reports were not able to cover all issues because quantitative data were unavailable. A number of country reports presented qualitative information instead, but others did not. Therefore this table should be interpreted with caution.

Table 3 Organisational risks in the EU countries

Risk factor	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FI	S	UK
High speed work	•		•					•	•		•		•	•	•
Tight deadlines/schedules			•										•	•g	•
Low control rhythm of work					•	•		•p		•p			•	•	•
Low control organisation of work	•	•			•	•		•p		•p				•	•
Low skill work	•		•							•				•	
Monotonous work		•p								•					
Low predictability of work		•													•
Poor quality of management		•p													
Lack of communication													•		
Conflicts with colleagues/management										•g				•p	
Low social support													•	•	
Violence/harassment by clients		•p											•	•p	•
Violence (theft/assault/crime)	•	•g						•	•						•
Violence (by police, border control)											•g				

For countries that provided information on both transport of goods and persons:

•p = transport of persons; •g = transport of goods, • = both sub-sectors

Working time

Working hours

The percentage of employees working standard hours in road transport is relatively low. All countries mention high average working hours. The percentage of employees working more than 40 hours a week is high in the sector compared with national levels; the same is true for working overtime. In Denmark, 67% of employees in freight transport by road work more than 45 hours a week. This tallies with the fact that freight transport by road is characterised by very high demands for efficiency and the need to maximise usage of the vehicles, bearing in mind the high investment costs. In Belgium, 24% of drivers work more than the maximum of 12 hours one, two or three days a month, and 21% work more than 12 hours two or three days a week. Employers state that it is almost impossible to decrease the working time of professional drivers because drivers do not want to earn less, do not want to share 'their' truck, and want to keep a good relationship with clients.

The Austrian report indicates that working weeks of between 70 and 80 hours are fairly common in international transport. In Spain, a dynamic perspective shows that working hours in the sector have remained high throughout the 1990s, compared with the downward trend registered for the national average. In the United Kingdom, 60% of employees in the sector work more than 48 hours a week, compared with 17% in the economy as a whole. Historically, drivers have worked these long hours to increase their earnings and reach a reasonable level of take-home pay. Long hours of work, combined with overnight stays away from home, make it difficult for drivers to achieve a balance between work and home life. While working hours in the sector are high in France, they have decreased significantly since the implementation of the Contrat du Progrès in 1995.

Hours worked in road transport of persons tend to be shorter than in freight transport by road. In the Netherlands, 47% of drivers regularly work more than 55 hours a week. The Luxembourg report speaks of a possible 'conspiracy' between drivers and transport companies against regulations that

limit driving (and therefore working) hours. The drivers want to drive as much as possible to be able to earn as much as possible, and companies also wish to make as much money as possible. This lack of willingness on the part of drivers makes sector bargaining in this area essentially one-sided in favour of employers. The unions are pushing for something that the workers they claim to represent do not want. What drivers really want is protection in terms of getting paid well for the work they do, as well as everything else that enhances their capacity to earn money.

External factors, too, may be responsible for long working hours. Congestion and traffic jams may result in an even earlier start to the working day, to be in time for the delivery of the freight to the client. In the crowded western part of the Netherlands, drivers may even start work at 4.00 or 5.00 a.m. in order to avoid the traffic jams. They then wait for the client to arrive to take in the goods.

The start time used to be around 7.00 a.m. some 10-15 years ago. This earlier start, however, does not mean that the drivers are home earlier, since they will meet the same traffic jams at the end of the working day. This indicates that working hours appear to have been lengthening over the last decades, not so much by increased driving times, but more by increased waiting times. This may be particularly the case for drivers who deliver goods ('piece-goods') in densely populated areas.

The new EU working time directive (2002/15/EC) adopted in February 2002 will impose restrictions on the amount of hours worked per day. It will be expected that weekly working hours will not exceed 48 hours, although it can be extended to 60 hours as long as the average is 48 hours over a reference period of up to four months. Night driving must not go over 10 hours. The directive will first only apply to employees. After a test period, it will be decided if it will also apply to the self-employed.

Despite the fact that the goal of this directive is to benefit the driver's health and safety, together with road safety, implementation is expected to cause problems. The Spanish government is expected to resist it (Spanish national report), as are the UK government and employers (UK national report). The Dutch employers' representatives predict that employers will experience even more difficulties in finding enough drivers to get the work done; as mentioned earlier, many vacancies already exist for the profession of driver. Also, employees do not want to earn less money.

Furthermore, part-time work is not very common in the transport sector. In the United Kingdom, there is a little use of part-time work in the sector: just under 9% in the sector work less than 35 hours a week compared with over 29% in the economy as a whole. In Germany, the percentage of employees in the sector working less than 36 hours (16.8%) is also lower than the national level (26.9%). The low percentage of part-time workers is also the case in Greece and Ireland.

Non-standard working times/working patterns

Employees in the transport sector have more non-standard working patterns, compared with the national average. The transport sector can be characterised by working unsocial hours: during the evening, night and morning and working during weekends and holidays. The following is a sample from the national reports:

- Austria: employees in the sector carry out shift work on a regular basis more often than the national average;

- Belgium: the percentage of transport employees on permanent night work (14%) is much higher than the national average (2%); while 60% of drivers sometimes work at night, and 25% work one to three nights a week;
- Spain: more than 75% of surveyed employees sometimes drive at night;
- Denmark: just 42.5% of the employees in the sector work permanent day shifts compared with a national average of 80%; while as much as 31.5% work irregular hours compared with a national average of 9%;
- United Kingdom: drivers are less likely to work formal shift patterns than those in other occupations. Weekend work is common and working at night is extensively used to make use of the road network when it is relatively empty.

Working time arrangements

Working time arrangements for the transport sector are not given in most country reports. In Spain, the percentage of employees in the sector who have flexible hours to start/finish work is relatively high compared with the national average. In Denmark, the percentage is the same as the national average. In the United Kingdom, however, flexitime in the sector is lower than the national average.

Negative health effects of the work situation

Not all countries describe the negative health effects of the work situation in the transport sector. However, several mention fatigue as an important risk factor of the long working hours in the sector. This fatigue may lead to road accidents.

Another risk factor can be driving at night. It might be expected to be less dangerous as a result of the reduced number of vehicles on the road. However, monotony may play a role in making drivers feel drowsy. Driving between 0.00 and 6.00 hours am, when the diurnal rhythm is normally set to sleep, appears to be most accident prone.

Furthermore, sleeping in the cabins while away from home has negative consequences on the quality of sleep and rest, not only because of the lack of comfort and hygiene in the cabin but also due to the fear of the load being stolen.

Irregular eating times and bad nutrition at inappropriate times, as well as eating too much, may cause stomach complaints and diseases of the alimentary tract. A number of drivers are overweight as a consequence of their lifestyle, including the effect of long hours of sitting.

The irregular rhythm of the life of employees in the sector may lead to cardiovascular disorders and heart disease in the long term.

Income levels and payment systems

The aim of this section is to provide some insight on income levels in the transport sector as well as a comparison with existing income levels both in services in general and the overall economy.

A comparison on income levels among the EU Member States is very difficult because of the many different items on which income is based. The tax levels differ in each country, which affects sub-groups differently, e.g. employees, self-employed, whether there is a second family income, etc.

Also, aspects of social security, such as health insurance, or bonuses for overtime may be incorporated differently in the income figures for different countries. Furthermore, the figures may have been gathered differently and for different years. Sometimes, figures are provided for the whole sector on a 2-digit, 3-digit or 4-digit level, for white collar and/or blue collar workers, net or gross, excluding or including compensations, etc.

An overview of the incomes in the transport sector is provided in Table 4. The information is presented by country because of all these differences. The table explains the differences to some extent.

Table 4 A summary of information on income levels in road transport by country

Country	Monthly wage €	Hourly wage €	National monthly wage €	National hourly wage €	Year	Remarks
Austria	980–1,144 * 1,540 nace60	5.7–6.6	1,636 **		2000	* Truck-driver wages according to collective agreement. ** Median gross income blue collar workers (men), women: €1,012, 2002. NACE 60-64, blue collar workers
Belgium	1,490 1,939	9	2,032		2002	National driving, due to extra payments the wage may increase by more than 30%. International driving
Denmark	3,290	22.24 *	3,763	25.62	2001	* includes bonuses and other extras
Finland	1,884		1,962		2000	
France	1,251–1,562		1,692 (1,999)		2000	Drivers in freight transport by road, excluding and including bonus and road allowance
Germany	1,233 (east)- 1,520 (west)				2001	Collectively agreed so-called standard rate (Ecklöhne / Eckentgelte) in selected collective agreements. Actual wages and salaries tend to be 20-30% above the collectively agreed pay scales.
Greece	548		499		2002	Basic monthly salary, many supplements possible
Ireland	2,437	13.70	2,518	14.18		NACE 60
Italy	1,390		1,342		2000	Blue collar
Luxembourg	2,408 (white)	8.68 (blue)	3,585 (white)	11.92 (blue)	1997	Hourly for blue collar workers Monthly for white collar workers
Netherlands		13.12 *		15.67 **	2000	* Wages freight transport by road vary from €7.44 to €15.37. ** 2002
Portugal	713.20		589.70		1999	NACE 60-63, average remuneration, Average base wage of NACE 6024 –10% of national level Including compensations –7% Qualified professionals, incl. drivers (male): resp. –3% and 0%
Spain	700 1,170 nace60	8.02	1,200	8.60	2001	Estimate of base salary €448 - €972 (provincial collective agreements) Labour costs: €1,392 and €1,372 (€9.53 and €9.83) including supplementary payments and overdue payments.
Sweden	2,370		2,760		2001	Includes pay for hours worked, pay remuneration for weekends and other payments
United Kingdom		11.14		19.02	2001	Gross, male, full time, incl. overtime

Table 5 Mean gross monthly earnings (€) – ESES, 1995

	National average	Drivers and mobile plant operators (ISCO 83)*
Austria	2,018	2,031
Belgium	2,169	1,848
Denmark	2,844	2,306
Finland	1,901	1,789
France	1,836	1,380
Germany (West)	2,646	2,496
Germany (East) (before 1990)	1,886	1,915
Greece	932	932
Italy	1,469	1,699
Luxembourg	2,515	2,249
Netherlands	2,142	1,949
Portugal	657	625
Spain	1,208	989
Sweden	2,044	1,796
United Kingdom	1,740	1,477

*Note: the report refers otherwise throughout to the NACE sector codes, rather than the ISCO occupation codes
 Source: European Structure of Earnings (ESES), 1995 – New Cronos database

Where Table 4 was based on the various data sources supplied by the national reports, it may also be useful to refer to figures of earnings (1995) from Eurostat as a single source in comparing all the countries (Table 5). Again, this table must be interpreted with some caution. It must be noted too that the figures are based on the ISCO occupation code system rather than the NACE sector codes, so it may not be exactly comparable with other data in the report. In most countries, there are no income statistics at the 4-digit NACE code level and income statistics may not even reveal the complete truth. Several of the national reports explain, on the basis of interviews they carried out, that parts of the income are not declared before the tax office/social security authorities; drivers may not even elaborate the full details to interviewers from national statistical organisations.

Significant variations exist within the transport sector. Income in both road transport of persons and freight transport tends to be lower than other categories of transport and also lower than the average private sector income. Greece and Italy are exceptions. In Italy, a comparison of wages paid in the road transport sector and the private sector reveals that the former is higher for the blue collar worker (30% higher in transport of persons, 4% in transport of freight). Workers in the transport of persons sector receive a higher remuneration than those in freight transport by road. These latter typically work more, are paid more and have more non-standard working patterns than other comparable sectors of the Italian economy.

The relatively low educational level in the sector may explain the low average wage level in the sector. In Denmark, for example, approximately half of the employees in the road transport sector have no other education than basic schooling (national average 35%). Also, the younger drivers in freight transport may explain the lower average wage level in the sector (Finland).

In many countries, the wages are based on collective agreements. In all countries, there are bonuses, compensation rules, regulations on expenses etc. because of the inconvenience factor (irregular working times, i.e. weekends, evenings, overtime hours, etc.). Employees receive an extra allowance for working on shifts, driving at night, working with unsafe substances and performing dirty or hazardous work. Employees receive compensation for expenses while travelling and for training. In Belgium, for instance, the wage may increase by more than 30% due to the extra payments.

In Greece, there are a number of supplements to raise the income level for truck drivers: first year increase and/or third year increase (10%), marriage supplement (10%), children supplement (5%), unhealthy/dangerous work, supplements for cashier's allowance. There are also supplements for drivers of school buses, special transport, security vans, container transport and vehicle transport.

Some country reports (Austria, Luxembourg, Sweden, United Kingdom) show a wage gap between men and women. In Luxembourg, the wage gap has narrowed since 1997 but, for skilled blue collar workers, the gap is still 26% (2000). In Austria, the gap between men and women is 20% to 40%.

Performance based payments

The Austrian report states that, in addition to regular wages, overtime amounts are mandatory for hours in excess of the regular 40-hour week and for night and weekend shifts. Rebates have to be paid for travel expenses. However, labour representatives argue that many, if not the majority of, professional truck drivers in road haulage receive, at least in part, performance based payments for kilometres travelled and/or tons carried. Different types of payments include hourly wages combined with performance based bonuses, fixed sum payments and purely performance based payments, etc.

As a consequence of performance based payments, time literally becomes money and drivers are tempted to complete the route as fast as they can – resulting in permanent time pressure and non-observance of mandatory driving time and rest period regulations. Drivers paid by performance based wages tend to make more money than drivers receiving hourly payments. However, a higher income is only generated by working a lot more, ranging up to 70 to 80 hours a week. This in turn may lead to overstressed and overtired drivers who present a serious security risk for themselves and the public. Labour representatives see a clear relationship between performance based wages and road accidents. Theoretically, Article 10 of EEC Regulation 3820/85 (adopted in the collective agreement for road haulage) prohibits any payments related to distances travelled and/or the amount of tons carried. However, the same provision also includes the somewhat ambiguous passage 'unless these payments are of such a kind as not to endanger road safety'.

It is clear that performance based wages always endanger road safety because they encourage drivers to disregard safety regulations. Experience has shown that the existence of performance based wages are rather difficult to prove since many companies in road haulage have two payroll accounts: an unofficial one with payments based on kilometres travelled and/or tons carried and an official one where the same payments are converted into hourly wage rates. Moreover, official on-the-book wages tend to be lower than the real ones, helping the company to save on social security contributions, but ultimately meaning that drivers receive lower unemployment and pension benefits. Unions call this practice 'social fraud'.

The United Kingdom reports that long hours of work, unpredictability of working hours and overnight stays are key risk factors in the freight transport by road sector, and can contribute to the stress associated with driving jobs as well as leading to fatigue-related traffic accidents. Risk groups include those whose employers encourage them to operate illegally by breaking the tachograph rules, and those whose employers operate a bonus scheme relating to the distance covered in a certain time, despite the fact that these practices are against regulations.

Health and safety

An important element of quality of work and employment is the degree of safety of the physical environment. This section describes the quality of the working environment in terms of occupational accidents, occupational diseases and absenteeism.

Occupational accidents

The road transport sector displays a high level of occupational accidents. In many countries, it is a legal requirement that accidents are reported if they result in unfitness for work for more than one day. However, some authorities (e.g. Denmark) estimate that the actual number of accidents is considerably greater (up to 50%) because a high number of small accidents are never reported. In Sweden, too, where there is no legal obligation on employers to report all accidents, it has been suggested that there is a degree of under-reporting, the extent of which is uncertain.

Both the passenger and freight transport sectors are characterised by a higher number of accidents than the total economy. In addition, working accidents in the transport sector result in more severe consequences than those in other sectors. Overall, the frequency and percentage of fatal accidents within NACE 60 and especially within NACE 6024 is two to five times greater than the average for all sectors. In Italy, the difference is seven times greater in public transport and 80 times greater in freight transport; while the number of accidents causing permanent disability is almost three times higher in freight transport than in other sectors. In Spain, figures for the land transport sector have consistently exceeded national figures throughout the last decade.

Nonetheless, the Italian data point towards a decreasing trend in the number of accidents that lead to permanent disability and occupational diseases.

The main causes of accidents in the sector are:

- falling from high surfaces, ground level falls, trips and slips;
- contact with moving or stationary objects, being struck by falling and moving objects;
- physical effort, handling, lifting and carrying objects, awkward movements.

In Austria, Finland, France, Greece and Sweden, for instance, over 30-40% of accidents that lead to absenteeism and/or permanent injuries are caused by a fall.

Occupational diseases

Most countries indicate that the sector experiences a relatively high number of mobility problems (diseases of the musculoskeletal system, particularly back, neck and shoulder problems) in comparison with the national average.

The most frequent disorders leading to invalidity pensions among blue-collar transport workers in Austria are 'disorders of skeleton, muscles and connective tissue'. Musculoskeletal disorders are especially typical for professional truck drivers who suffer from long periods of sitting in a monotonous position. In addition, as has been mentioned, professional truck drivers suffer from a lack of exercise and from irregular and unhealthy nutrition.

The Netherlands reports that a typical occupational disease among drivers is lower back pain. However, it is likely that such physical complaints may sometimes be made, due to a reluctance by drivers to admit to an underlying psychological illness. It has been shown in longitudinal research that both back problems and problems in the neck and shoulder region can be caused by a high work pace and/or by bad relations at work (Hoogendoorn, 2002; Ariëns, 2002). Psychological disorders are only mentioned by the Netherlands (taking second place in the sector, first at national level) and Sweden, where a significant portion of bus and tram drivers reported having health problems caused by mental stress. In 2001, 14.2% of the drivers reported having these problems, compared with 8.8% for all workers.

In Denmark, the transport of persons sub-sector shows an over-representation of occupational diseases related to hearing impairment. In Germany, the percentage of musculoskeletal and connective tissue illnesses is higher in the transport sector (21.9%) compared with the national level (19.7%). Spain reports that back and knee problems increase as drivers grow older. Driving at night not only worsens the aforementioned health problems – their chances of being reported rise by 75% – but also causes eye strain, which might increase the risk of accidents. The longer the working hours, the greater the chances of suffering from sleeping and digestive disorders, irritability and swollen lower limbs.

In Ireland, hearing problems are often reported; the transport sector accounts for 11% of all cases. In Germany, too, the most common occupational disease among drivers is problems related to noise. Between 1994 and 1998, noise contributed to 51.7% of all recognised occupational diseases. Diseases of the lumbar vertebra column caused by lifting and carrying take second place, followed by skin diseases. Spain reports that the number of occupational diseases leading to interruption of work have risen in the NACE 60 sector, more so than in the total economy. In Austria, the sector accounts for an increasing percentage of the total number of invalidity pensions.

A survey on working conditions in Finland shows that only a third of drivers believed they would not need to consider early retirement on the basis of health. Road transport workers tend to smoke more heavily, exercise less, and have more weight problems than workers in other sectors. Consequently, drivers have been reported to suffer from hypertension and other cardiovascular diseases, sleep apnoea, excess weight, stress and back and neck-shoulder disorders. There are indications that health plays a part in selecting which drivers stay in the sector. It may be presumed that only a few truck and bus drivers continue to work until the normal retirement age of 65 years.

Sick leave

In Germany, an analysis of the number of sick days shows that illnesses of the musculoskeletal system and connective tissue are the main cause at both national and sector level.

Italy, the Netherlands and Spain report a greater need for rehabilitation among road transport workers (about 26 days) than nationally (about 23 days). In the Netherlands, however, the

percentage of days lost per year due to sick leave in freight transport by road is the same as the national average. In Spain, the average length of the rehabilitation period shows a general downward trend.

In Sweden, workers in road transport tend to be off work for long periods following accidents (64-83 days, compared with 34 days at national level). Moreover, the length of time off due to occupational diseases is very high. The Irish report states that 3% of calendar days are lost as a result of sick leave.

Social protection

Not all countries have specified this paragraph. Some discussed this issue in chapter three (e.g. Denmark, Italy, Luxembourg, the Netherlands, Spain, UK). The main categories are presented below.

Many countries summarised access to social security as:

- benefits when sick (or pregnant), or having an occupational disease
- benefits when disabled/invalided for work
- benefits when unemployed
- benefits for old age/retirement
- possibilities for early retirement
- access to favourable/relatively cheap health care insurances
- acts against discrimination by gender, ethnicity, sexual preference.

In several country reports, access to social protection was identified as a problem (e.g. in the Austrian and German reports), since drivers suffer from low unemployment and pension benefits.

Overall, employees have easier access to the benefits as outlined above than the self-employed, who generally have to insure themselves. In general, such insurances are very costly. In the Netherlands, it is shown that only half of the self-employed insure themselves for these risks. Should those that do not insure themselves get sick, disabled or unemployed, they will have a major problem, both human and financial.

This chapter discusses policies and instruments that regulate the quality of work and employment. First, relevant European legislation is presented. This is followed by collective agreements within the freight transport by road sector, OSH prevention policies, company strategies and examples of good practice.

Regulations at EU and national level

Working Time Directive

One of the European directives that is of major significance to the road freight transport sector at present is the working time directive (Directive 2002/15/EC). The text of *Directive 2002/15/EC on the organisation of the working time of persons performing mobile road transport activities* was published in the EU Official Journal on 23 March 2002. Member States have three years in which to transpose its provisions into national legislation. The text regulates a range of areas, including maximum weekly working time, rest breaks and limits on night work. These regulations do not apply to self-employed drivers for a further four years.

The main provisions of the new directive are as follows: (copied from the EIRO database: <http://www.eiro.eurofound.eu.int/2002/04/Feature/EU0204208F.html>)

- working time is defined broadly as all the time when mobile workers are at the workstation, at the disposal of the employer and exercising their functions or activities. This includes a wide variety of functions in addition to driving. The definition also includes time during which workers are ready and waiting to take up normal work;
- the maximum working week is 48 hours, although it can be extended to 60 hours as long as the average is 48 hours over a reference period of up to four months;
- a 30-minute break should be taken after six hours of work, or a 45-minute break after between six and nine hours of work;
- the working day (over a 24-hour period) must not exceed 10 hours for night workers;
- derogations from the provisions on the maximum working week and night work for objective or technical reasons or reasons concerning the organisation of work, may be adopted by means of collective agreements, agreements between the social partners, or if this is not possible, by laws, regulations or administrative provisions (provided there is consultation of the representatives of the employers and workers concerned and efforts are made to encourage all relevant forms of social dialogue), although the reference period for the calculation of the maximum working week may not exceed six months;
- records of the working time of mobile workers must be kept for at least two years by employers;
- Member States must comply with the Directive by 23 March 2005. This constitutes a three-year implementation period. Self-employed drivers are exempted from the scope of the Directive for the first four years after the implementation date (i.e. until 23 March 2009). The situation will then be reviewed and the Commission will propose either their inclusion or continuing exclusion.

This directive makes the difficulties relating to working times in the sector very apparent within the Member States (see also chapter four on social dialogue). Finland took the Commission to court

over the exemption for the self-employed, while Spain has asked the Court to dismiss the directive entirely. The UK government and employers are also expected to resist the new working time directive. The next chapter will examine this issue in relation to the social dialogue.

Other important legislation on working, driving and resting time

In EEC Regulation No 3820, 1985, driving and resting times are specified, among other issues such as minimum age and certification. This regulation applies to all drivers, including the self-employed. Article seven states that drivers should have a break period of at least 45 minutes after four-and-a-half hours' driving. Instead of the 45 minutes, the driver may also take three breaks of at least 15 minutes distributed over the four-and-a-half-hour driving period. Waiting times caused by traffic jams or by loading and unloading the truck do not count as a break period.

Also, the driver must keep a daily rest period of at least 11 consecutive hours in each period of 24 hours. The daily rest period can be reduced to nine hours a day no more than three times a week, on condition that an equivalent period of rest is granted as compensation before the end of the following week. When a vehicle is staffed by two drivers, each driver must obtain a daily rest period of at least eight consecutive hours during each 30-hour period. (Hermann, 2003). For more information on these driving and resting times, see <http://europa.eu.int/scadplus/leg/en/cha/c10406.htm>.

In order to enforce the driving and resting times as stated in 3820, ECC Regulation 3821/85 requires the installation of recording equipment in transport vehicles. A 1998 amendment (EEC Regulation 2135/98) demands the installation of new electronic equipment no later than 2004.

In addition to this, the Council Directive 88/599/ECC obliges Member States to carry out regular and appropriate checks of drivers and their vehicles for at least 1% of the total days worked by professional truck drivers in one year. No less than 15% of these checks must take place on the roadside, and no less than 25% at the premises of the vehicles (Hermann, 2003). Member States are to report control activities in the appropriate form to the Commission every two years (Council Directive 88/599/ECC and 93/172/ECC).

Professional training and certification

Driver training is currently regulated by Directive 76/914/EEC on training for certain road transport drivers, and Directive 91/439/EEC on driving licences. The Commission presented a proposal for a directive laying down common rules on training for all new professional drivers, taking account of the complexity of the profession. This European driver certification programme (ECC Regulation 2000/0297) came into force in March 2003. The chapter on social dialogue will present additional thoughts on how this has been received in Europe.

Specific regulations on safety and driving dangerous substances

Most EU countries have legislation on road safety. In several European countries, such as Austria, Luxembourg, the Netherlands, there are night and weekend driving bans for trucks which exceed a certain tonnage. Drivers who transport perishable goods may be excluded from these weekend bans. These bans aim to regulate resting times for the drivers during the weekend, and also to reduce traffic density at the weekend when non-professional drivers tend to go for a drive. Some of

these weekend drivers are not very experienced. A lower traffic density will therefore ensure greater road safety.

EU countries generally have specific regulations on travelling with dangerous substances. In some countries, such as the Netherlands, drivers of dangerous substances must have certification and 'refresher' training, every five years in the case of the Netherlands. Most provisions on driving dangerous substances do not focus on the drivers specifically, but have an indirect impact on the working conditions of the drivers and other workers concerned. A recent Dutch study shows that drivers of dangerous substances violate legislation on e.g. working, driving and resting times less frequently (Jettinghoff, Houtman and Evers, 2003). This indicates that these drivers are more aware of their responsibility for the safety of themselves as well as other persons using the road.

In Belgium, the most relevant provisions concern the appointment of a safety advisor, and strict requirements concerning vocational training for the safety advisor as well as for the drivers and other workers.

Quality of work and employment

All of the European countries have legislation and rules to protect employees from occupational safety and health risks, though there are wide differences in the dates they came into force and the content of the rules. In the early 1990s, the EU countries adopted legislation from the General Framework for preventive action on the quality of work and employment. This framework resulted in some harmonisation, although specific differences still exist. In general, this framework was designed to agree:

- the pursuit of a health and safety policy;
- the application of a risk inventory and assessment;
- that employees are informed and advised about health and safety at work;
- a report on occupational accidents and diseases to be sent to the Labour Inspection (and to Eurostat);
- certain policy aspects on which employees should be informed or have a say (Works Councils Act etc.);
- calling in the help of a certified occupational health and safety service;
- the availability of in-house emergency and first-aid service (to a certain standard).

Some national reports mentioned this directive. In general, the sector came out well, i.e. having done more risk assessments than the average (e.g. France, the Netherlands, Spain).

Since it was a general framework, and not a sector specific one, certain specific issues of transport were felt to be neglected (see Box 3).

Box 3 Shortcomings of the General Framework on Quality of Work and Employment

According to one of the two Belgian trade unions, there are several shortcomings in the General Framework on Quality of Work and Employment. Two that are mentioned are:

- regarding the medical survey for workers: a transport driver is not necessarily a safety risk to his colleagues, but can be a risk to other road users;
- the section on working at heights does not anticipate specific risks for drivers, e.g. when they put a tarpaulin across the loading.

Denmark has implemented a Working Environment Act, resulting in the institution of a Working Environment Authority, and a Working Environment Council. The Working Environment Authority consists of a central division and 15 regional inspectorates. It contributes to the creation of safe and sound working conditions, and supervises enterprises by drawing up rules and providing information and guidance on the Working Environment Act. In the Working Environment Council, the social partners influence the drafting of new rules and inform the Minister of Employment on development in the health and safety field.

France has implemented specific directives/regulations on the improvement of quality of work and employment in the sector (see Box 4).

Box 4 Improvement of work and employment in the transport sector in France

In 1994, social partners (employers and employees) reached an agreement, the *Contrat du Progrès*, which led to a far-reaching improvement of working conditions in road transport of goods. The *Contrat du Progrès* was gradually implemented, beginning in 1995.

There are five key aspects to the *Contrat du Progrès*. Some of the measures (such as maximum working hours) have been implemented in French law and imported into the collective agreement.

The main features of the five key aspects are:

Gradual reduction in working time

1994: 280-320 hours/month
1995: 240 hours/month
1996: 230 hours/month
1997: 230 hours/month
2002: 230 hours/month

Openness

Recognition and payment of all hours worked (which was not necessarily the case before)

Since 1997, recognition of all hours made available to the employer (e.g. waiting time, time for loading and unloading)

Increase in financial compensation (working and rest time)

Between 1995 and 1997, wage payment for drivers increased by about 11%. Since 1998, long-haul lorry drivers have received a further 28% increase in wage payment; regional drivers have received a further 23% increase in wage payment.

Compensation for overtime has been improved. Hours worked up to 35 hours are paid at the normal rate (100%). Between 35 and 43 hours/week, the rate is 125%; while between 43 and 56 hours, the rate is 150% plus a rest period equal to the number of hours worked over 43 in the week. Thus, every hour worked beyond 43 hours in a week is rewarded 2.5 times the normal rate.

Compulsory initial and ongoing training

This takes on board the European directives on training for road transport drivers, and the need for 'refresher' training.

Retirement scheme for drivers

Since 1997, a retirement scheme is available for drivers. From 55 years of age, drivers can retire with 75% of income (until normal age of retirement). Over the past five years, 7,800 drivers have retired under this scheme, after having worked for 29 years on average.

The French adopted the new Working Time Directive in 2002. Following its adoption, the social partners (UFT, UNOSTRA and CFDT) reached an agreement that any hours worked in excess of 35 hours will be treated as overtime.

Other regulations identified as relevant

The national reports identify other legislation or regulations as relevant to the sector.

In some countries, issues concerning labour law are mentioned, such as salaries during sick leave (Denmark); as well as other matters that are generally agreed upon in social agreements in other countries.

In Spain, a law regulates employment relations for private enterprise employees (although not exclusively in the freight transport by road sector). They also have a law on land transport which aims to provide the transport system throughout the whole of Spain with a homogenous general regulatory framework.

In the Netherlands, the Works Council Act gives the works council the right to be informed about certain issues, and to make an appeal against employers' plans if necessary, particularly with regard to work, safety and health.

Enforcement

EU laws, mostly directives, define minimum standards and provide a level-playing field. Under such a legal framework, enforcement falls to the Member States. There seems to be no lack of legislation to protect the workers in the sector. There is, however, a very clear view that much of the legislation is not being complied with, and is often not favoured by either employers or employees.

In a report presented by Bayliss and Coleman to the EU as far back as 1994, it was stated that 'lack of enforcement of regulations is perhaps the single greatest problem facing the sector, in that it distorts competition but also endangers both those engaged in the profession and the general public.'

The introduction of the digital tachograph and automatic roadside monitoring as standard for roadside control is considered 'a matter of urgency' in their report. In order to become a healthy,

competitive single European market for road freight transport, social, technical and fiscal harmonisation are necessary. The success of harmonisation measures is, of course, highly dependent upon compliance (Bayliss and Coleman, 1994).

Collective agreements

Many issues are regulated by law in some countries, and by collective agreements in others. Northern countries tend to regulate with collective agreements. In Denmark, for example, there is an inherent conflict between the Danish tradition of regulation of the labour market through agreements, and the more legislation-oriented type of regulation under construction at EU level.

Denmark has – over a period of up to 100 years – built up a collective bargaining-based model for the regulation of labour market conditions. This does not exclude legislation: examples include the Holiday Act, the Legal Relationships Act and the Working Conditions Act. The Working Environment Act in the field of health and safety at work will be supplemented with agreements by the social partners.

Denmark thus represents a country where legislation and agreements combine successfully to protect both the worker and the competitiveness of the firms, with good collaboration between the government, the employers' representatives and the trade unions. In many other countries, the social agreements are not very fruitful. In Portugal, it is reported that 'the social dialogue is inoperative'. In Greece, there is no social dialogue at all.

The next chapter will discuss the social dialogue more thoroughly. For now, the attention moves to practices specifically relating to occupational safety and health (OSH), followed by good practices of a broader organisational or technological nature at national, sectoral or organisational level.

OSH prevention policies

Numerous examples of OSH practices among the EU countries are described here, at several levels. At the most global level are the national initiatives, mostly started by supporting organisations. These organisations may be the government in general, specific ministries, or sector institutes paid by legal or government regulations. The initiatives include general OSH prizes, funds and subsidies. Research may be considered an example of an initiative at national level, since much research money is generated nationally, but often research projects focus on sector specific issues. Initiatives such as research, funds, subsidies and prizes may, however, also be stimulated (financially or other) by the social partners in the sector. The social partners are often responsible for much of the vocational training. Finally, there may be good practices of OSH at organisational level.

Funds, prizes and subsidies

In the Netherlands, there is a national prize each year for the organisation that organises its quality of work and employment in an excellent way. An independent jury awards this prize: Kroon op het werk (Crown or 'the Favourite' at work). In 2002, the prize went to the Occupational Health Intermediary for Road Freight Transport for their excellent work as an intermediary between employers and employees, and particularly as a help to transport organisations in facilitating and

optimising the quality of the OSH service provided to employers and employees. It is highly regarded to win this prize. It generates positive publicity for the organisations themselves as well as the sectors in which they work. The Occupational Health Intermediary for Road Freight Transport itself also gives an annual award to the best transport company for quality of work.

The Flemish government has introduced cheques to encourage education/training for workers. A company can buy up to 200 cheques at €30 each. The government and the company each pay half of the costs. This subsidy addresses the argument that workers in the sector do not follow education programmes because they are too expensive. Another argument, coming from the Dutch national report, is that the sector has 'no training culture' and, although they may need training, the workers are not very interested. No assessment could be made yet on the effectiveness of this Flemish measure.

At national level, a safety charter has been developed in Belgium, which was received quite positively by the Flemish transport companies.

In Finland, funds are made available to support working conditions in the road transport sector. Some of these funds come from large companies like Volvo. Also, the Reuma-Foundation of Truck Drivers and insurance companies aim to improve traffic safety.

In the UK, there are initiatives to increase road safety, such as the Work Related Road Safety Task Group, and the Royal Society for the Prevention of Accidents. Money is also available from the 'Road Haulage Modernisation Fund' and the 'Road Haulage and Distribution Training Council'.

Training at sectoral level

In many countries, the social partners are responsible for training at sectoral level. Mention is made of these activities in the national reports of Belgium, Denmark, Finland, France, Luxembourg, the Netherlands, Spain and the UK).

In Belgium, campaigns are organised on specific issues for traffic in general or for specific groups. In 2003, the campaign was to be directed at driving fatigue.

All kinds of vocational training activities have been launched in Belgium directed both at job seekers (to counteract the scarcity of drivers), and at those already working in the sector.

Codes of practice

In the UK, a code of practice on respect for people has been set up, as well as a joint code of practice for agency drivers (see Box 5 and also Box 12).

Box 5 Examples of guidelines and codes of practice from the UK

- A series of booklets on good employment practice has been produced by the RHA for its members – ‘How to manage ...’ (sickness absence, redundancy, discipline, business transfer, contracts of employment, recruitment and selection, health and safety);
- The Work-Related Road Safety Task Group has recommended the introduction of a new Approved Code of Practice on managing work-related road traffic risks;
- Publication of a document under the ‘Highway Code Explained’ series will provide a link between those responsible for transport matters within firms and those responsible for occupational health and safety;
- Generic guidance is given to set out good practice and allow different sectors of the transport industry to draw up policies and procedures based on their own needs.

Finland also mentions booklets of guidelines for advisors, employers and employees.

Research on issues relevant to transport

Many issues relevant to this sector are currently under study. Some of these issues deal with OSH. Many relate to driver fatigue as a precursor of traffic accidents. Research has been carried out in the following areas:

- Determinants of work-related stress, fatigue and performance, e.g. Jettinghoff, Houtman & Evers, 2003; Croon, 2002; a study on ‘Blink duration as an indicator of driver sleepiness among professional bus drivers’ (Häkkinen et al, 1999); and a study on ‘Professional driving, driver fatigue and traffic safety’ (Häkkinen, 2000);
- Reduce accidents by implementing a safety manual⁵ (in Portugal);
- Keep one’s distance - The results of a regional driver training experiment (Lähdeniemi, 1996);
- Occupational petrol exposure and renal carcinoma (Roth et al, 1997);
- Shift work, sleep disturbances and coronary heart disease (Tenkanen et al, 1997);
- Work and protective clothing for ADR drivers (Meinander, 1998);
- Attacks on Danish drivers (with Spain and Italy as high risk countries).

Good OSH practice in organisations

Some good practice at organisational level should also be mentioned. In the UK, information has been collected by the IRS on preventive services directed at health and safety (Box 6).

Following the results of the survey as shown in Box 6, the IRS suggest that, given the nature of driving work, it is not surprising that the benefits on offer to drivers are aimed at assisting their health and well-being, rather than improving their work–life balance. However, it is important to

⁵ <http://www.iru.org/Presenting/Sustain/BIP/simoes.pdf>

note that the organisations surveyed were from the wider road transport sector and included 'own-account' freight transport operators, public transport operators and 13 public sector organisations (National Health Service Trusts and local authorities). It may not, therefore, accurately reflect the situation in the road freight transport sector itself, which, as has been noted, includes many small 'hire and reward' operators who may be less likely to offer these types of benefits.

Box 6 An example from the UK of benefits on offer to vehicle drivers (services directed at health and safety, and improving quality of work and employment)

Benefit	% of companies providing
Pensions	92
Life assurance	49
Subsidised staff canteen	41
Private medical insurance	18
Health club	12
Discounted or free products	10
Permanent health insurance	10
Concessionary travel	8
Share schemes	6
Childcare vouchers	4
Dental insurance	4
Profit share schemes	4
Employee assistance programme	2
Optical insurance	2

N = 51

Source: IRS, 2001

This overview suggests an emphasis on insurances. The same is true for the German system (Box 7). Other examples, e.g. from Portugal (Box 8) and Sweden (Box 9), suggest that this is not typical for the situation in Europe, but that OSH activities may also be directed more towards the worker's health.

Box 7 OSH practices in Germany

The German Berufsgenossenschaften are the institutions that issue regulations and inspect compliance of the regulations. They consult, provide information and give advice to companies. The activities aim predominantly to avoid accidents and occupational diseases, and to organise payment of pensions or for rehabilitation. The insurance function is in the foreground. Occupational illness is not the central focus unless it leads to insurance claims.

The Federal Ministry of Labour and Social Affairs launched a programme of model projects to combat occupational diseases in 2000. The road transport sector has not been subject to research until now.

One of the most positive countries in the handling of OSH problems is Denmark, which has introduced its action plan for improvement of working conditions in Denmark (<http://www.bm.dk/publikationer/1999/handelingsplan/handelingsplan.asp>). The transport sector (among others) is the target of an intensified effort to improve working conditions, and the government has earmarked €4,530,000 for implementation and research projects in this area.

Box 8 An example of (preventive) OSH services in Portugal		
OSH services in the workplace		
(in %)	I60-I63	National
Total	87.4	68.4
Internal services	62.8	68.7
External services	34.7	29.2
Inter-firm services	2.5	2.2
Source: DETEFP (2000) Inquiry to Working Conditions		
Other related services in the workplace		
% of workers who receive:	I60-I63	National
Training for emergency situations	25.6	19.9
Information about professional risks	65.3	53.2
Collective protection equipment	78.2	84.9
Individual protective equipment: has and uses	27.8	29.5
Individual protective equipment: has and does not use	3.1	6.1
Source: DETEFP (2000) Inquiry to Working Conditions		

In Sweden, attention is given not only to primary prevention, but also to reducing health problems, absenteeism and rehabilitation (Box 9).

Box 9 Example from Sweden
OSH prevention policies:
1. Measures for a better working environment and clearer employer responsibility:
a. national objectives for better health in working life
b. three-party talks between government and social partners
c. economic incentives for the employer to prevent poor health
d. development of action on the working environment
e. health audits
f. trials to reduce the incidence of poor health in the public sector.
2. Measures for an early return to work after absence due to illness:
a. Reform of the rehabilitation system
b. Adjustment of current legislation with the aim of raising the quality of rehabilitation
c. Procedures for sick leave.
3. Research and related areas:
a. Improvement of statistics and research into poor health
b. Improvement of access to treatment in the health and medical care system.

Good practice at work

Much good practice is not immediately directed at health and safety, but at obtaining a higher efficiency and productivity. When long-term perspectives are considered, these good practices will also be directed at proper working conditions and conditions of employment, resulting in healthy and productive employees. Some examples in European countries are described below.

Funds and subsidies

At EU level, the fifth and sixth framework programmes are in place, alongside several other innovative subsidy programmes for research. These research programmes provide a subsidy for applied research with technological and/or socio-economic value. However, no research into transport was granted from these funds.

Some national initiatives have been taken to stimulate innovation in the sector. Box 10 presents an example from the UK.

Box 10 An example from the UK on the availability of innovation funds

In the 2001 Budget, the Chancellor of the Exchequer outlined a £100m package of measures designed to secure environmental objectives by encouraging road haulage innovation and modernisation. The Road Haulage Modernisation Fund is administered by the Department for Transport and includes the following:

- Advice to HGV drivers on improving fuel efficiency (HGV = heavy goods vehicles);
- A programme to train young drivers and so redress the anticipated shortage of qualified HGV drivers;
- A pilot study for an industry-led quality initiative to raise standards and improve performance;
- Retrofitting existing HGVs to reduce emissions and improve air quality.

In some countries, large firms spend money on the stimulation of research or implementation projects that aim to improve the sector. As has been noted, in Finland, the Volvo firm provides funds for this.

Continuous training

Continuous training is a way to keep up with the required skills in a changing workplace. The workplace of the truck driver has changed in several ways over the last number of years. Many technical changes (ICT-related) have taken place, but also social skills are more necessary as the driver has become the main personal contact between the transport organisation and the client. More foreign languages and skills to communicate with different cultures have become necessary as Europe continues to expand and evolve towards one single market. International transport has grown considerably over the past number of decades.

Both technical innovation and new demands in human resource management require more technical, social and communicative skills (see Box 11).

Box 11 Example of continuous training in Spain

The participation rate in vocational training stagnated between 1997 and 2000, and even fell in 1998. According to current regulatory changes, a one-week training course per year will shortly be in force. Examples of actions taken towards continuous training include:

- training tool on safety in road transport;
- publishing the research on training needs in road freight transport;
- training project on the telematic cooperation network for training planning, management and assessment on the Internet;
- assessment of training needs for the self-employed;
- training in logistic platforms for workers in the freight transport sector;
- PETRA, a strategic plan for the freight transport by road sector, including the promotion of a social observatory, etc.

Guidelines or codes of practice

As was mentioned under the codes of practice for OSH, practical guidelines are in place in relation to the new ways of work in the sector (see Box 12).

Box 12 An example of UK guidelines and codes on new ways of work in the sector

A code of practice 'Respect for People' has been set up under the Road Haulage Modernisation programme. It includes initiatives to improve roadside facilities, jointly with motorway service stations, and guidelines for employees receiving drivers from other companies.

A Joint Code of Good Practice for Agency Drivers has been established by the Recruitment and Employment Confederation, the Freight Transport Association and the Road Haulage Association. It contains advice for agencies and employers on the treatment of agency drivers, including checking references and licences, induction, training and supervision.

Research

New areas of research in the transport sector may also relate to social or technical changes or new approaches to human resource management. Research activities in this regard appear to be mainly conducted in the northern European countries, Finland in particular.

The Danish government created the Danish Transport Research Institute in August 2000. It is connected to both the Transport Safety and Risk Department as well as to the Transport Economics and Modelling Centre. This initiative illustrates the need for a link between OSH research activities and economic productivity. One of the studies was 'Driver breaks – efficiency and the working environment'. The report can be ordered from their website (<http://www.fstyr.dk>).

Good practice at sectoral and organisational level

Many examples of good practice go beyond a narrow OSH definition, but have an important OSH effect in the long term on both the working individual and the work organisation. Company examples include:

- Norbert Dentressangle UK Ltd: Safe driving policies and procedures with performance measures relating to accident rates, fuel consumption, insurance premiums and complaints (UK);
- Robert Wiseman Dairies: Policy 'Vehicle driving the Wiseman way – guidance for all drivers' – comprehensive guidance on all aspects of driving, including loading and unloading, delivery, accident procedures, tachographs etc. (UK);
- Interface project: This project aims to improve the employability of risk groups (Belgium).

Social dialogue and views of different actors

This chapter presents the positions and interests of, and discussion between, the employers and the employees in freight transport by road. Employers and employees are in discussion both at national and at EU level.

First, information is given on the coverage of the national and European unions, followed by the views of the employer organisations and the trade unions. The issues raised will be as they have been presented in the national reports. Then the views and discussions at European level will be examined. These talks centre on issues that will become relevant at national level in the near future, as more policies are decided upon in Brussels. The final section outlines the issues of consent and dissent at national and EU level.

The actors and their coverage

The coverage of the employers and employees gives an indication of their strength, i.e. the amount of people they can organise from a certain position in the sector. This information, however, does not necessarily demonstrate the coverage of collective agreements. There may be a very low union density, yet 90% of the employees in the sector are covered by collective agreements. Perhaps the best indicator of the percentage of employees covered by collective agreements is the coverage of the employers.

National employer organisations and employee unions

The coverage of the employer organisations appears to be quite large in those European countries that provided this information. As for the coverage of employees, the available data differ a lot per country. In some countries, there is a large coverage (e.g. Norway, Denmark), whereas in most countries there is a low to average coverage (see Table 6). Not all EU countries were able to provide this information.

Table 6 Number of employer and employee organisations and their coverage

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FI	S	UK
Employer organisations	4	6 (4 in 602)	3	no data	3	9	no data	4 (freight) 3 (persons)	1	3	1	3	1	3	2
coverage	?	>50% employees covered	?		72% of employers covered	1.4-26.3% of employers covered		30% (freight)	20% employees covered	80% employees covered	100% of employers covered	5.5%-69%	85% of employers covered	?	?
Unions	3	3	3	108	3	3	no data	3	2	3	11	2	1	4	3
coverage	?	>80%	35.5%	?	<1-9.5%	total: 8% are member of union; freight transport 1-33%		12-40%	13-62%	27%	10-15%	9%-38%	?	12-48%	36%

Despite the fact that there is low coverage of employees on average, the agreements between employer and employee representatives determine important aspects of work in the sector such as wages, job classifications, leisure time, overtime, special leave, holidays and issues of security and flexibility. In many countries, collective agreements are at least as important as the regulatory measures, or sometimes even more important (e.g. Denmark).

The way in which the social dialogue is organised differs greatly in the different countries. Although most European countries organise the parties nationally, some organise them regionally/locally (e.g. Austria, Denmark, Greece). The latter option results in many more collective agreements. In Spain, social bargaining is organised at provincial level. Although only three labour unions negotiate the collective agreements, they are regionally organised, or separately organised per large enterprise. This means that in Spain, 128 collective agreements were bargained in 2001.

Employer and employee representation at EU level

At EU level, the employers are organised in the **International Road Transport Union (IRU)**. The IRU represents employers, but not self-employed. The main interest of the IRU is to facilitate road transport internationally. It played an important role in the TIR Convention (TIR = Transport International de Marchandises par la Routier), where agreement was reached with customs to facilitate international transport. The TIR agreement was considered a major success.

Members of the IRU are not restricted to European countries, but may come from all over the world, even China. In the EU Member States, not all employer organisations may become members. This often has to do with competition at national level, (e.g. in France). The IRU has a total of about 47 member organisations.

Within the EU, the IRU has set up liaison committees to deal with EU legislation in particular. There are separate liaison committees for freight transport and for transport of persons. In some cases, people from the two liaison committees work together on expert areas. With respect to freight transport, all European countries are represented but, for the transport of persons, no Irish organisation is present. 'Own account transport' is not represented in the liaison committees (i.e. transport done by organisations of which the main activity is something other than transport, but who may belong for example to the retail trade, the food industry or the hotel and restaurant sector).

The liaison committees work as follows. When a topic is due for discussion, the relevant liaison committee is involved at an early stage. Because there may be different views at national level, views are exchanged and communicated. There may be consensus or dissent with the EU Commission. The discussion within the IRU is meant to aim towards an internally consistent position which is either strong or weak, depending upon the degree of consensus reached. There is always an IRU advice on a Commission proposal. Although there may be some dissent between the EU members of the IRU, no opposition is allowed from IRU members to IRU-agreed positions.

In the past, all IRU members were allowed to come to Commission meetings to discuss a proposal, but this has changed. The European Commission now invites the liaison to come to discuss an EU proposal, but only a limited number of people are invited (seven or eight members). Although this reduced number improves efficiency and allows real discussions, this means more time is needed

for the IRU internal preparation. Because of the size of the IRU, even for internal meetings only one seat per country is available, although more organisations within a country may be members. This further adds to the time needed for preparing an IRU position at EU level.

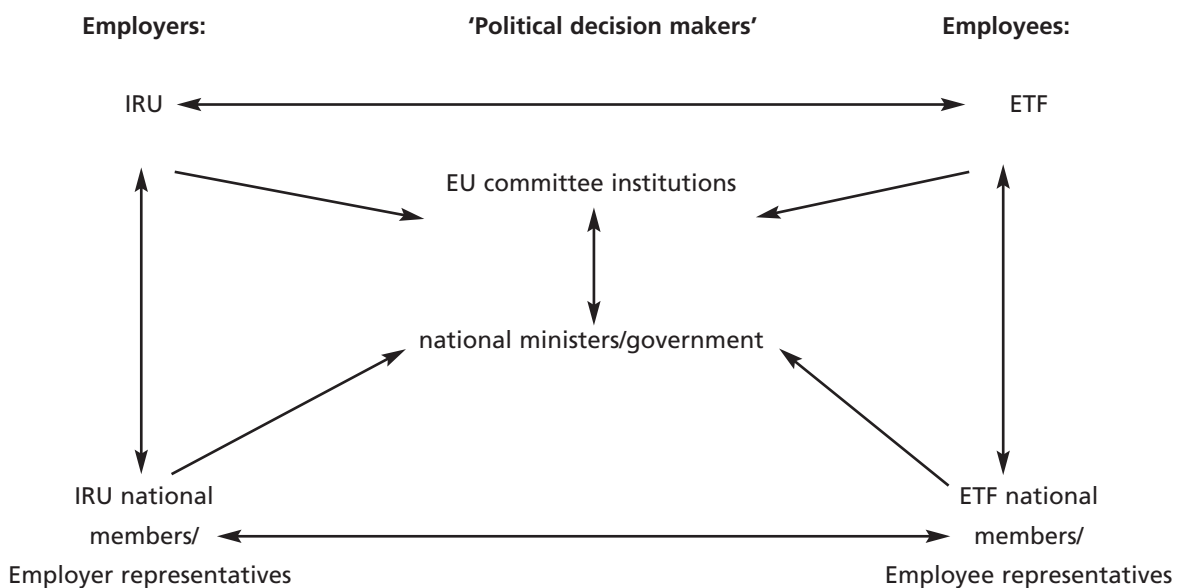
At EU level, employees' interests are represented by the **European Transport Workers' Federation (ETF)**. The ETF is a pan-European organisation (since 1999; before that, it was limited to EU and EFTA countries), covering 39 countries and 203 trade unions. In most EU countries, all unions are members. It consists of seven rather autonomous sections, one of which concerns freight transport by road. All of the national trade unions are organised in different sections. The representative for the ETF generally covers more than one section. The ETF has a congress, as well as executive and management committees. It is in the sections that the ETF's sectoral policies are decided. Decisions are taken on a consensus basis. The national unions have votes. In principle, the national union should not oppose the decisions that are decided upon by the ETF.

ETF is a member of ETUC, the employee representative that coordinates industrial relations at EU level (ETUC = European Trade Union Confederation). The ETF and ETUC are mutually helpful. ETF might ask ETUC for support on specific positions.

The ETF collects information from its members by sending out a questionnaire each year. This covers many topics, ranging from the percentage of employees within the union to issues for discussion. Because several national members do not know how many employees they cover (see Table 5), the ETF does not know either.

A general model of how the employer and employee representatives relate to the EU, and their national government, is illustrated in Figure 13.

Figure 13 Relationships among employers, employees and government at national and EU level in the freight transport by road sector



The unidirectional arrows between the employer and employee representatives and the European Commission, as well as those unidirectional arrows between their national members and the national government may be too restricted. Mutual discussion among employer and employee organisations at national sectoral level does take place in the many institutions and organisations in which they both participate. At EU level, they meet in discussions, but there are no institutions in which they both participate.

It was made clear by the IRU that the social dimension is important enough to discuss with the unions. However, they do not see the need to discuss non-social matters with employee representatives. Examples of such non-social issues, according to the IRU, are road user charges, eco-point issues and certain technical safety legislation. Discussions on topics like driving and resting time rules and regulations, and their enforcement, are – although difficult to agree upon – acknowledged by the IRU as relevant for the employee representatives.

The employee representatives want to broaden the discussion agenda and feel that issues relating to the competitiveness of transport organisations have a direct influence on the wages of their personnel/drivers and on what has to be delivered for those wages. In their opinion, this will also determine driving and resting times, as well as the question of how much resting time is still to be counted as working time.

Employer organisations

The main concerns of employer organisations in the different EU countries reflect the concerns of their members, i.e. national employers. In general, the self-employed are not represented by any national organisation. In the Netherlands there is, however, an organisation representing the self-employed at national level (VERN).

The concern of employers may be summarised as very much determined by the profitability and competitiveness of the company or enterprise. This is reflected by their efforts to provide the transport at competitively low (maybe even too low) prices. It may result in somewhat different company/employer practices across countries. The most creative examples come from countries close to east European borders (Austria, Germany, Sweden), where some employers may attract 'cheap' drivers, or pay illegal wages. In Belgium, the Netherlands, and the UK, there are some problems regarding companies not paying overtime, or even working time according to the agreements.

The employer organisations do not, of course, approve of illegal practices. They represent the employers' interests in the process of collective bargaining. The specific topics they represent in that process will be listed below.

Working hours

Working and resting times are of major concern in the employer organisations, particularly within the context of the new working time directive that will have to be implemented at national level throughout the EU by 25 March 2005. It is generally expected that this will cause problems, as the directive has quite negative consequences for both employers and employees. The employers will lose competitiveness, while the employees fear for their income when the average working time drops.

Employers are already experiencing a shortage of personnel, particularly of drivers, which is the occupational group that will be most affected by the new directive. The directive will force drivers to work less than the amount of work they are currently doing, based on a three-week average.

Given the shortage of personnel already prevalent in most European countries, companies in freight transport will have great difficulty in keeping up the transport service they now provide when the new working time directive is implemented. This is best illustrated by considering an international transport that takes several days to deliver the goods. Within the context of the new directive, drivers cannot drive to and from a particular destination in the same number of working days as before if they are to abide by the new regulations. A company can choose to send two drivers, who can alternately drive and rest, and so keep the delivery time schedule and keep within the legal rules. The other possibility is to make the delivery with one driver but it will take much longer – not an option in the view of the client and the employer. For the company, the use of a second driver on the same route will mean that another ride cannot be made. Compensating for the loss of efficiency by passing on the cost to the client is also problematic in such a competitive and open market. There is an added concern of cost-cutting when the acceding and candidate countries enter the EU and will be able to provide transport services throughout Europe.

In the national reports, this problem is often raised by the employer representatives. As was mentioned earlier, the Spanish government is expected to refute the new working time directive, and the UK government and employers to resist it. The co-responsibility or co-liability of clients may have an important impact on driving and resting times (Belgium), but putting too much emphasis on the liability of clients may be difficult, since the customer demands cheap prices.

In some European countries, there is an increasing number of self-employed. The new working time directive excludes the self-employed in road transport for the first four years. The employer organisations want the same working time regulations to apply for road transport companies with employees and for the self-employed. The Finnish representatives took the European Commission to court over this issue.

Level of pay

Wages are among the issues mentioned by employer representatives, and regarded as a difficult part of the collective agreements. The earnings are overall largely satisfactory because of the long working hours. Because of increased competition and falling carriage prices, however, companies in freight transport report having problems maintaining the current regulation where the operating time, including waiting periods, is paid as working time. The employer representatives would like waiting periods to be excluded or not fully counted as working time (Austria).

Shortage of personnel

A shortage of personnel, particularly of drivers, is mentioned in almost all the national reports. This shortage of personnel may be due to several reasons (these are mainly described in the Spanish report):

- Being a driver is a hard job. The working conditions are tough and little can be done to improve them as they are intrinsic to the job. These conditions include: spending a long time away from home (in international transport); the long hours (also in national transport); and the physical

demands of the job (sitting in the same position for a long period of time, alternated with heavy work outside when loading or unloading the truck in all kinds of weather). The use of new technologies such as mobile phones and on-board computers, however, has considerably improved the working conditions since the driver can seek support whenever difficulties may arise. In several national reports, it was stated that drivers prefer urban transport as this allows them to sleep at home. Other reports noted that it is particularly younger drivers who are active in international transport but, as they get older, they move into national and local transport;

- The sector has a negative image, which is partly determined by the poor working conditions, but also by the fact that drivers are perceived as being low educated workers. Although the initial level of education is rather low, the employers stressed that drivers are adequately trained people, driving well equipped vehicles through good roads (Spanish report).
- The labour market has expanded. As the economy grew, the labour market flourished, and people had many alternative choices for 'better' jobs rather than choosing a job with a negative image (e.g. Spanish report);
- Wider travel opportunities exist. Years ago, being a driver was one way to see different places. Nowadays, people travel widely on their own, and have the money and time to see places themselves.

The opening of European markets also has repercussions in terms of employment. Companies are moving in the direction of doing business with the EU acceding and candidate countries. The Luxembourg report mentions that employers have little chance of finding workers willing to accept such long distance assignments in Luxembourg or neighbouring countries. In addition, difficulties arise in relation to language and culture. It should be possible, therefore, to draw upon drivers from 'destination countries'. However, currently, this is not legally possible, at least in Luxembourg.

Foreign and non-EU drivers

The freight transport sector does not typically employ foreign or non-EU workers. The shortage of drivers has led some countries to take action in order to ensure an influx of new drivers, including women drivers and foreign workers (e.g. Belgium, Spain). There may, however, be administrative barriers to hiring non-native drivers. In Spain, for example, non-native drivers have to acquire a driving licence in Spain. The written test has to be performed in Spanish, which can create a language barrier. An exception is made, however, for Bulgarian drivers, who are allowed to take the test in their own mother tongue. This Spanish example illustrates how selective administrative measures can be used to make sure that a specific influx may be stimulated.

Safety

Employers mention the issue of safety in relation to drinking alcohol, speeding, and safety and vehicle comfort. Luxembourg employers explain that campaigns or preventive actions are very difficult to implement as drivers are only rarely present at the enterprise premises.

Investment in training and information

In most European countries, employer organisations are involved in the promotion of vocational training. This includes both the initial training that is necessary to obtain a driving licence to transport freight, as well as additional training, e.g. periodic training of drivers who transport

dangerous substances. In the Netherlands, employer representatives are also involved, through the Occupational Health Intermediary, in courses on stress management and managing physical loads. Other countries, however, note a lack of investment in training and information (particularly the Portuguese report).

Trade unions

The trade unions in the freight transport by road sector mention more or less the same kind of issues as the employers, but they often differ in the weight given to these topics and in the way they seek to manage potential problems.

Working hours and level of pay

Employees in the sector, particularly drivers, work excessively long hours, mainly due to the low wages. They need to earn more money than the basic wage.

According to the recently adopted working time directive, the unions are in favour of distinguishing between periods of availability that are considered as working time and periods of availability that are not considered as working time.

Box 13 Example from Germany

In Germany, it has always been accepted that periods of availability required by the employer are considered as periods of working availability and therefore are clearly working time. In the German collective agreement, it is agreed that periods of time in the cabin (including sleeping) constitute working time and have to be paid.

The trade union expects that the new legislation will lead to questioning existing regulations in the collective agreements and encourage the disregarding of these agreements. The union admits that it is common in the sector to disregard collective agreements.

In general, drivers will welcome the new time directive, and working shorter hours. Cuts in wages, however, will not be tolerated. Employee representatives want the employers to raise wages and alter wage structures in order to address the 'long hours culture'.

Changes in work organisation

During the last two decades, just in time deliveries have become increasingly the practice. This puts an unhealthy and unsafe pressure on workers, not only for the drivers themselves but also for other road users and – in the case of person transport – for the passengers too. The principle of just in time working puts such a level of pressure on drivers that they may find themselves obliged to break the law.

Health and safety

Only a few countries mentioned favourable examples for health and safety provisions. In the Netherlands, the Occupational Health Intermediary for road transport is a well-regarded institute with both employer and employee organisations on the board. It has received a national prize of

'good practice' for its work. In Portugal, some positive organisational examples were mentioned for the transport of persons, but not for the more profit-driven sub-sector of freight transport.

The Italian union correspondent goes so far as to claim that excessive driving is a cause of neurological and heart disease.

New technology

Increasing use of technology has, in general, been welcomed. It helps to monitor and register driving and resting times properly and makes sure that, when problems arise, the drivers can contact, or be contacted by, their home base (either family or the company, e.g. planner, management). Both employer and employee representatives are generally in favour of new technology and encourage the use of newly developed equipment. The main area of concern is the risk of accidents caused by the use of mobile phones while driving and the over-commitment to work as illustrated by the monitoring results.

Compliance

In general, the working time acts in the different countries seem to be well implemented. Practical experience, however, shows that companies do not always record the working time properly, resulting in less pay than the employee has a right to. Unions generally state that a major problem of the sector is not the lack of legislation but the lack of abiding by the legislation. The same is true for issues that are agreed upon at sectoral level. It is difficult to control and monitor issues over a considerable range. Although EU-wide use of the digital tachograph will greatly facilitate monitoring and control, there will still be difficulties in covering some, particularly international, journeys.

Box 14 Example from Portugal

In Portugal, the age of vehicles used in the transport of persons is very old. This is not so much the case in freight transport. The average age of the vehicles in the transport of persons is 14 years, but vehicles can be up to 30 or 40 years' old. Apart from the technological problems that can arise, there is increased probability of accidents in the sector. Accidents involving vehicles in the transport of persons have increased in Portugal over the past few years. According to the Portuguese report, the driver is always considered to be at fault, but often the real cause of the accident lies elsewhere.

Not only working time regulations are broken. Exceeding the maximum load per vehicle may be profitable for the company but a risk for road safety.

Social protection

Austria, Germany, Luxembourg and Portugal mention that there is a trend for employees in the sector to have to take more responsibility on themselves, possibly as falsely self-employed (see Box 1). More employees are given fixed-term rather than permanent contracts. This makes their position weaker than it used to be.

More social security problems appear to be on the way as competition squeezes EU workers who cost more, including social security overheads, compared with neighbouring, non-EU workers who agree to earn less for a comparable service. So far, this has been mainly an issue for countries bordering on non-EU countries.

Training and information

The unions are in favour of better training provisions. Some unions take the position that, instead of using repressive measures to improve road safety, the emphasis should be on prevention and training (e.g. Luxembourg). It is, however, also stated that the freight transport sector does not have a real 'training culture' (Dutch report). Additional training courses, beyond those that are absolutely necessary, are often difficult to organise and to fill the places. Despite EU funds for training and investment in the sector, the Portuguese report states that this opportunity was wasted in their country.

Enforcement

In general, more effective enforcement of existing regulation is requested. It is difficult to control and monitor the issues regulated at EU level, as they require national control from the Member States. Sanctioning at EU level is not yet well developed.

Communication with control agencies of other EU countries is not yet very sophisticated. Also, the relocation of companies to countries where employees and taxes are more advantageous for employers has been legalised by the Treaty on the European Union. Many transport companies appear to have established themselves in Luxembourg (see Box 15), where the level of employees' social security contributions are below those of the majority of EU countries.

Box 15 Specific issue for Luxembourg

The Luxembourg national report states that many transport companies have established themselves in Luxembourg, where the level of employers' social security contributions are below those of the majority of European countries. This makes these companies more competitive in the European market. Unfortunately, more and more of these companies are in reality only 'letterbox' companies that do not always respect collective working agreements in force in Luxembourg. This scenario makes monitoring employment law difficult.

As was noted under compliance, EU-wide use of the digital tachograph should greatly facilitate control and monitoring. Although problems will remain in covering a proportion of international rides especially, advocating its use may be a good start for control at EU level.

The move towards self-employment, that seems to exist in several EU countries, will make it more difficult to monitor, however. Several monitoring systems are linked to either employee/employer surveys or to employee social security information.

Views at European level

As was noted earlier, the international employer organisation (IRU) believes that the social dimension is important enough to discuss with the unions. However, the employer and employee representatives do not always agree on the distinction between social and non-social matters. This means that the European Transport Workers Federation (ETF) feels less involved in social policy issues.

Issues recently under discussion

Working Time Directive

The European Commission issued the working time directive on 25 March 2002. This means an amendment of the driving and resting time regulation, and of speed limitations. Trucks now also need to have a speedometer⁶. Agreement on working times broke down at EU level. However, at national level, the directive has to be implemented in the EU Member States by 2005. As was noted earlier, several governments have reacted strongly against the directive. The IRU hopes that there will be no need to have the self-employed included in the directive, when that issue is reviewed for 2009. They believe that the more restrictive the regulations become, the more opportunities are created for other types of transport (e.g. 'Own Account Transport'). This would not be a desirable situation for the employers.

The ETF has pointed out in relation to control of the new directive that a three-week period is needed for it to be effective. Road checks only look at an eight-day period. The ETF hopes that the Commission will revise the road and company checks.

Training Directive

Another directive recently decided upon was the training directive. This directive introduces compulsory training for truck drivers. Employers are in favour of such training. At issue, however, is who pays for this training. Nothing is said about this in the directive. On the other side, the ETF is very disappointed by the training directive. This disappointment stemmed from the fact that Parliament approved the Council proposal, which had been amended in two key areas from the original proposal:

1. No training hours are mentioned, but just 'training courses or tests'. A 'test' is considered far too minimal by the employees' representative interviewed. The certificate that the drivers get does not specify which of these options has been attended, a course or a test. Some countries (e.g. UK) opted for the test instead of the course, whereas other countries opted for long-term professional training (e.g. Germany chose three years' training on a voluntary basis). Since the difference between a test and a course may be so great, the quality label that the IRU gives to the training (or testing) institutes does not guarantee quality, according to the ETF.
2. No clarity on finances was given. This issue was also identified as a problem by the employers' representative. Because of this uncertainty, it will be difficult to promote the training. The countries that will have most difficulties in arranging finances may be the ones that need this training initiative most.

One positive thing in the training directive, according to the ETF, is that it states that continuous training should be carried out within working time. The ETF perceives it as very positive that Parliament recognises the importance of continuous training, and that it is to be considered as work.

⁶ Urban public transport is excluded from the working time directive.

Issues currently under discussion

Digital tachograph

The old tachograph has been installed in all trucks by now, but the digital tachograph is not yet in place. According to the IRU, a problem arose in that the rules surrounding monitoring by the digital tachograph could not be translated into a computer programme. This necessitated a change in the rules and regulations. The regulation states that, two years after implementation of the technical annex, the digital tachograph has to be installed. However, it took three years just to present a technical annex. A new deadline then had to be prepared by the Commission and approved by the Council and Parliament.

The employee representative, on the other hand, does not believe that the inability to translate regulations into computer language was the main issue, nor the delay in approval by the Council and Parliament. In general, the trade unions support the introduction of the digital tachograph. Their main problem is that the Council decided not to have a retrofitting. Retrofitting refers to the interchangeability of the new and the old device, ensuring that the driver information can be taken with the driver when he mounts a new vehicle.

The digital tachograph only keeps record of a specific driver as long as he is driving that vehicle, but no information can be collected when a driver changes vehicle if that vehicle does not have such a digital device. The employees' representative thinks that this will facilitate fraud until all trucks have a digital tachograph, which may take up to 10 years. In an expanding EU, it is possible that it may even take longer than 10 years before all trucks have a digital tachograph.

Further related issues concern ownership of the data and who has to pay the fine.

Defining work time

Employer and employee representatives define work time quite differently. The issue under debate is to what amount resting times should be considered work, and what point do they become time off work.

Weekend driving ban

According to the employee representative, one of the items under discussion is the weekend ban. The issue is about guaranteed driving and resting times, and a proper family life. There are, however, diverging standpoints among ETF members. The ETF received the most negative responses from the Scandinavian countries, since they have already negotiated this at national level, and since they generally dislike legislation, prohibitions or bans.

On the other hand, many European countries already have weekend bans, though many of these make an exception for the transport of perishable goods at the weekend. The employee representative reports of one particular inspection in Luxembourg, a country that has a weekend ban, excepting perishable goods. Of the 150 trucks that were checked, only 10 were cooled (and thus equipped for the transport of perishable goods). The trucks appeared to be transporting everything except perishable goods, even the 10 cooled trucks.

National economic incentives

The employer representative mentioned the implications of countries taking specific measures to tackle poor national economic growth by allowing special rates and tax measures for national tax-

payers. The road user charges that were due to commence in Germany are an example of this. Tax breaks will mean that the net costs of using the German highways will be cheaper for German drivers, which will lead to unfair competition within the EU. The employers take the position that the need for economic growth cannot ignore the needs of the transport sector.

EU enlargement

Many new countries will join the EU in 2004. This will impinge on several of the issues discussed above. There is a concern that, due to the low wages in these new EU countries, more transport will be given over to them. However, many of these companies will have difficulties in attracting drivers with the appropriate training.

The employer representative points out that employers in the existing Member States can start new companies in the new countries. The trade unions might have a bigger problem, in that they seek to improve the working conditions, health and social security of workers. Their concern will be that conditions may get worse on average as the EU expands.

The employer representative is convinced that the expansion will be a positive step and lead to a substantial increase in transportation volume. This was the case when Spain and Portugal entered the EU. Such growth should increase the amount of work available in the transport sector, and will provide jobs for many workers in the new, expanded Europe.

The shortage of personnel has already resulted in certain admission strategies in the sector, e.g. allowing drivers from Bulgaria in Spain. In Sweden and Luxembourg, foreign drivers can receive a permit to be a driver, but are not allowed to drive in the 'home' country itself (be it Sweden or Luxembourg). This was done in Sweden by granting a work permit but no residency permit.

Issues of consent and dissent

National level

In most European countries, the social dialogue is considered to be reasonably good, despite the different interests of employers and employees. It is, however, reported to be particularly poor in Portugal, where the present collective agreement dates back to 1980.

Issues of consent and dissent are partly determined at national level.

In most countries, there is consensus between the social partners on:

- the fact that there are problems regarding working conditions in road transport. In some countries, employer and employee representatives have contributed to improving the working conditions (e.g. Belgium, Denmark, France, the Netherlands);
- the recognition that intense competition and work pressure are a real concern in the sector;
- the importance of using the new digital tools that are available in the sector;
- the necessity to provide education and training opportunities for workers in the sector;
- the importance of collective agreements and work legislation in governing terms and conditions of work and employment;
- the impact of EU liberalisation and deregulation (the German report gives particular emphasis to this).

There are often differences between the social partners in how to address the issues. The following issues are especially problematic:

- Working hours and compulsory resting times. This is mentioned in almost all of the national reports and appears to be a highly sensitive subject. Aside from the long working hours and the way to handle the new working time directive, there is also discussion on flexibility of working hours. Employers want more flexible hours, but the unions do not;
- Level of pay. This is a continuous debate and the subject of almost all collective bargaining processes;
- Labour shortage. The employer and employee representatives favour different methods in approaching this difficulty;
- Scope for further progress on working conditions. In France, where there have been many improvements in working conditions, the employers feel that this has cost them enough. The employee representatives do not agree;
- Social legislation in the country (German national report). According to the employee representatives, irregular practices are widespread (the Luxembourg report);
- The right to strike (Swedish report).

Two examples are presented below, from Portugal and Denmark.

Box 16 Example from Portugal

In Portugal, the social dialogue is very poor, practically inoperative. The positions of the parties are strongly divergent and no positive development has been seen in the sector. The situation has actually worsened since 1997.

The present collective agreement dates back to 1980. When no consensus is reached, the situation stays as it is. The present agreement reflects a social context that has by and large changed since that time, and is poorly adapted to meet the present circumstances and competitiveness in the sector.

Employers believe that the safety regulations are an excuse to charge heavy fines. They are regarded as a source of extra revenue rather than regulations for the health and safety of employees and the public, which have to be abided by.

Unions refuse to accept greater flexibility in labour conditions, particularly in working times.

Problems that the unions identify include:

1. working hours (of particular concern);
2. age of the fleet (particularly in passenger transport);
3. increase in the practice of employment based on fixed-term contracts, weakening the position of the worker;
4. low wages;
5. poor law enforcement and monitoring;
6. lack of investment in training and information;
7. health and safety in the workplace.

Box 17 The Danish dispute

The social partners have different opinions on the government's various proposals and initiatives regarding psychosocial aspects of health and safety at work. The employers expressed the view that agreements concluded by the social partners concerning health and safety should take precedence over statutory orders and regulations. In July 2001, the government made a radical proposal to abolish the Working Environment Act. The new coalition government decision to shelve the package in 2001/2002 means that working environment legislation has been set back by about one year. This development is welcomed by the employer representatives.

The unions are strongly against the idea of taking such radical steps as abolishing the WEA. One of the unions stressed that the field of health and safety at work is, increasingly, a 'grey zone' in which the employers' wish for voluntary agreements can only function as long as the problems can be solved at enterprise level. For the unions, it is also important that the weakest groups in the labour market do not become the losers, because of the preference for agreements rather than statutory regulation. The unions were against the abolition of the requirement on SMEs to set up internal safety organisations, and the removal of the National Working Environment Authority's right to impose fines, etc.

European level

At European level, the social partners agree on several issues. These issues contain certain incompatibilities, however, which illustrate the different positions of the employer and employee representatives at European level. These issues are:

- continuous professional training is important. Both employer and employee representatives agree on the fact that something should have been included in the training directive on how the training should be financed. That this was not included may be due to the fact that their viewpoints on this issue were irreconcilable;
- the use of new technological developments is to the benefit of the sector. One of the major issues on which employer and employee representatives disagree, however, is the way in which the controls are to be recorded and regulated.

Both examples illustrate that employers and employees find the same issues important. Yet they struggle over how to define the platform for issues (e.g. 'which issues do we discuss among ourselves and which constitute "social affairs"'), and how they want rules to be applied.

A report by Bayliss and Coleman (1994) was the result of an enquiry to investigate the economic and social situation in road freight transport and to make recommendations with respect to policy. It identified that 'perhaps the single greatest problem facing the sector', which both 'endangers ... those engaged in the profession and the general public' was the enforcement of regulations. This report realised that information technology could assist greatly in areas such as:

- producing documents that are better protected from fraud and abuse;
- access to administrative information between administrators;
- monitoring vehicle and container movements;
- monitoring and controlling driver hours;

- advanced digit control tachographs;
- monitoring vehicle axle weights through road systems linked to camera identification and automatic debiting.

It seems that the recommendations outlined above were stifled or counterbalanced by other arguments within the intervening ten years, since these remain exactly the issues on which no firm agreements have yet been reached. The only area on which some success has been achieved is the area of working time, though, since this has been received quite negatively at national level, there are fears as to how effective the enforcement of this directive will be. Several national reports acknowledge the issue of lack of enforcement (e.g. Italy, the Netherlands, Portugal).

In the last decades, the road freight transport sector has undergone unprecedented growth and internationalisation. These changes have significantly influenced work and employment conditions in the sector. As this report shows, creating more and better jobs, while enhancing competitiveness, are among the major challenges facing the road transport sector.

The aim of this report was twofold:

- to specify the socio-economic conditions under which the road freight transport sector operates in the EU and underline the highly competitive environment of this sector;
- to analyse the work and employment conditions in this sector, and point to major trends and changes in the field.

Economic challenges

Road freight transport companies operate in a highly competitive environment. Maintaining and enhancing competitiveness is a major challenge. Greater demands from customers for precision, speed and flexibility in the delivery of goods result in 'just in time' deliveries. This, combined with tough competition, causes tight deadlines, increased work intensity and reduced control of pace and organisation of work. Figures from the Foundation's European Survey on Working Conditions reflect this trend.

Moreover, the sector is also characterised by a particular susceptibility to the economic climate. The current economic slowdown in the EU has had a negative impact on growth of road freight transport. On the other hand, the transport of persons, a public service in many Member States, has been less directly affected.

Enlargement

The socio-economic impact of the EU's enlargement to include 10 new countries in May 2004 is often discussed. The possible impact of migration from the acceding countries and from non-EU countries is also increasingly raised as an issue of some concern.

Regulatory challenges

The need to reform regulatory (health safety legislation, labour law, social protection) and fiscal regimes is also often highlighted among the actors in the field. Another sensitive issue is the controversy around lack of compliance within the sector.

Health and safety issues

Despite major improvements in some areas (ergonomic positions, working time regulation, etc.), health and safety issues remain high on the agenda. Attention to ergonomic design has grown but, despite improvements, musculoskeletal (particularly back) problems persist. Long sitting periods – one of the psychosocial risk factors proven to cause musculoskeletal problems, in addition to increases in work pace – may explain this persistent health outcome.

Physical risks are also increasing, such as the risk of being robbed (freight transport) or assaulted (transport of persons).

Environment issues

Large-scale traffic congestion and increased waiting times for the delivery and unloading of goods, as well as the use of time windows for the delivery of goods in densely populated areas, have added to the increase in work intensity and lack of control.

Technological developments have resulted in cleaner vehicles and less exposure to fumes and vapours. Drivers of dangerous substances remain a risk group, however, with respect to exposure to dangerous fumes and vapours when loading and unloading their freight.

Technological changes

Specific technological developments such as the introduction of the digital tachograph, satellite tracking devices (GPS) and on-board computers, as well as the use of mobile telephones result in changes both positive and negative. Positive effects are that they increase road safety, result in more accessible drivers (e.g. for family information), lead to less administration, more efficient planning and more accurate cost calculations. The negative effects are higher levels of control, resulting in feelings of restricted autonomy. These technological changes will have an impact on the required skills for workers in the sector.

Competence development

There is a progressive restructuring of the driver's role due to the emergence of new forms and operations and logistics management. As a result, drivers' tasks have been widened and diversified. Drivers often have to do work traditionally carried out by warehouse or stock personnel, and social skills are now often required in the driver's relationship with a client. The driver is increasingly the client's sole contact with the transport organisation. Growing international transport means that drivers must be familiar with different languages and cultures, and be skilled in communicating with different kinds of people.

Workers are generally not highly educated, although drivers of dangerous substances have additional vocational training. Adjustments to technological and economic change in the profession require life-long training. The sector, however, does not seem to have developed a training culture.

Job creation

The present shortage of qualified personnel, particularly drivers, is a real challenge. The driving profession remains associated with poor working conditions, low wages and a problematic work-life balance, particularly for international drivers. Measures could also be taken to boost women's participation in the driver profession. And finally, the sector needs to tackle the variable levels of training and qualifications from one Member State to another in an effort to ensure greater mobility and employment.

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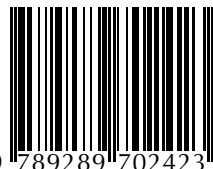
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