

Industrial relations and social dialogue

# **Representativeness of the European social partner organisations: Road transport sector**





# Representativeness of the European social partner organisations: Road transport sector



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## Abbreviations

ALE	Federation of European Train Drivers' Unions
ARGE	European Federation of Locks and Building Hardware Manufacturers
CB	collective bargaining
Cedefop	European Centre for the Development of Vocational Training
CER	Community of European Railway and Infrastructure Companies
CESI	European Confederation of Independent Trade Unions
Clecat	European Association for Forwarding, Transport, Logistics and Customs Services
CORTE	Confederation of Organisations in Road Transport Enforcement
ECTA	European Chemical Transport Association
ERSC	European Road Safety Charter
ESSDC	European sectoral social dialogue committee
ETF	European Transport Workers' Federation
ETUI	European Trade Union Institute
Eurotra	European Transport Training Association
Fedemac	European Movers Federation
IRU	International Road Transport Union
ITF	International Transport Workers' Federation
NACE	Nomenclature of Economic Activities – European statistical classification of economic activities
RT	road transport
SBS	structural business statistics
TFEU	Treaty on the Functioning of the European Union
UETR	European Road Hauliers Association
UICR	International Union of Professional Drivers (Union Internationale des Chauffeurs Routiers)
UITP	International Association of Public Transport
UPT	urban public transport

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## Country codes

<b>AT</b>	Austria	<b>ES</b>	Spain	<b>LV</b>	Latvia
<b>BE</b>	Belgium	<b>FI</b>	Finland	<b>MT</b>	Malta
<b>BG</b>	Bulgaria	<b>FR</b>	France	<b>NL</b>	Netherlands
<b>CY</b>	Cyprus	<b>HR</b>	Croatia	<b>PL</b>	Poland
<b>CZ</b>	Czechia	<b>HU</b>	Hungary	<b>PT</b>	Portugal
<b>DE</b>	Germany	<b>IE</b>	Ireland	<b>RO</b>	Romania
<b>DK</b>	Denmark	<b>IT</b>	Italy	<b>SE</b>	Sweden
<b>EE</b>	Estonia	<b>LT</b>	Lithuania	<b>SI</b>	Slovenia
<b>EL</b>	Greece	<b>LU</b>	Luxembourg	<b>SK</b>	Slovakia

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## Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners – that is, the trade unions and employer organisations – in the road transport sector and to show how they relate to the sector’s European-level organisations representing employees and employers.

The report is divided into three main chapters: an overview of employment trends in the road transport sector; an analysis of the social partner organisations in the 27 EU Member States; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

This section presents the objectives of the study along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the road transport sector, which has a history going back to the 1960s.

### Objectives of the study

Representativeness studies are conducted for the following reasons.

- The results are used to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is one criterion for setting up or participating in an ESSDC.
- Representativeness studies are a means of assessing whether the relevant European social partners have the capacity to negotiate agreements that can be implemented by Council decision, as provided for by Article 155 of the TFEU.

In addition, this study offers the following advantages.

- This study can offer guidance for future capacity-building initiatives.
- This study can help to clarify the importance of social partner organisations for social dialogue coordinators in other directorates-general (as set out in Section 3.3 of the European Commission communication of 25 January 2023; European Commission, 2023a) and can provide support for applications for project funding.
- This study aims to provide the necessary information to enable decision-makers to assess the request for a separate ESSDC for urban public transport activities (Nomenclature of Economic Activities (NACE) code 49.31, ‘Urban and suburban passenger land transport’; see Table 1 for a full description of the NACE codes in question).

Representativeness is defined in the European Commission decision of 20 May 1998 on the establishment of sectoral social dialogue committees promoting the dialogue between the social partners at European level (Decision 98/500/EC). For an organisation to be recognised as a representative EU social partner organisation, it must:

- relate to specific sectors or categories and be organised at European level
- represent organisations that are themselves an integral and recognised part of Member States’ social partner structures, that have the capacity to negotiate labour agreements and that are representative of several Member States

- have adequate structures to ensure its effective participation in the work of an ESSDC

To accomplish its aims, this study first identifies the relevant national social partner organisations in the sector before analysing the structure of the sector's relevant European organisations. This analysis is guided by the representativeness criteria set out in Article 1 of Decision 98/500/EC, namely sector-relatedness, having national affiliated organisations that are an integral part of the industrial relations landscape at national level and that have the capacity to negotiate, and having adequate structures to ensure effective participation.

## Definitions and methodology

The methodology applied in this study is linked to the criteria identified in Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity. These criteria will be defined successively in this section.

### Sector-relatedness

As far as sector-relatedness is concerned, every sector is defined in terms of NACE Revision 2 (Rev. 2) codes. In this context, it is relevant to mention Commission Delegated Regulation (EU) 2023/137, issued on 10 October 2022 (European Commission, 2023b), which modifies Regulation (EC) No 1893/2006 of the European Parliament and of the Council, with the latter having established the statistical classification of economic activities known as NACE Rev. 2. Commission Delegated Regulation (EU) 2023/137 introduces modifications to NACE Rev. 2 to reflect contemporary economic realities, addressing the impacts of globalisation, digitalisation and emerging economic activities. The new NACE codes (NACE Rev. 2.1) entered into force in February 2023 and will apply to data transmissions to Eurostat from 1 January 2025 onwards, as indicated in Article 1 of Commission Delegated Regulation (EU) 2023/137.

NACE Rev. 2.1 divides the sector into codes 49.3, 'Other passenger land transport', and 49.4, 'Freight transport by road [49.41] and removal services [49.92]'. The subdivisions relevant to this study are NACE Rev. 2.1, 49.3 is subdivided into 'Scheduled passenger transport by road' (49.31), 'Non-scheduled passenger transport by road' (49.32), 'On-demand passenger transport service activities by vehicle with driver' (49.33) and 'Other passenger land transport' (49.39). Since the data collection for the present study started in 2022 – before NACE Rev. 2.1 entered into force – the findings of this study refer to the former NACE codes (NACE Rev. 2), as presented in Table 1.

The scope of all existing ESSDCs has been demarcated using the relevant sector-related NACE code, which defines the economic activities covered by the committee. The NACE codes to be applied in each sectoral representativeness study are confirmed by the European Commission after consultation with the European social partners. In this study, the sector is defined by the NACE Rev. 2 codes listed in Table 1.

Table 1: NACE Rev. 2 codes used in defining the road transport sector

Term used in the report	NACE codes	Description
Whole road transport sector	NACE 49.31: Urban and suburban passenger land transport NACE 49.32: Taxi operation NACE 49.39: Other passenger land transport NACE 49.41: Freight transport by road NACE 49.92: Removal services	
Urban public transport	NACE 49.31: Urban and suburban passenger land transport	This may include different modes of land transport, such as motor bus, tramway, streetcar, trolley bus, underground and elevated railways, etc. The transport is carried out on scheduled routes normally following a fixed time schedule, entailing the picking up and setting down of passengers at normally fixed stops. This can also include town-to-airport or town-to-station lines and the operation of funicular railways, aerial cableways, etc., if these are part of urban or suburban transit systems.  This class excludes transport by interurban railways.
	NACE 49.32: Taxi operation	This class includes taxi service providers and other renting of private cars with a driver and can be divided into: <ul style="list-style-type: none"> <li>• private transport services (a private customer orders the service under a private relation, with the service paid for by the customer)</li> <li>• transport services for certain types of passengers, such as people with disabilities, older people and special categories of workers with irregular working time (the service is available for certain groups only and is usually publicly funded through public procurement procedures)</li> <li>• taxi services available to all and organised and regulated by the local authority, including quality and tariffs (the service is accessible to all, paid for by the customer and based on publicly regulated tariffs)</li> </ul>

Term used in the report	NACE codes	Description
Rest of road transport	NACE 49.39: Other passenger land transport	<p>This class includes:</p> <ul style="list-style-type: none"> <li>• scheduled long-distance bus services</li> <li>• charters, excursions and other occasional coach services</li> <li>• airport shuttles</li> <li>• the operation of teleferics, funiculars, and ski and cable lifts if not part of urban or suburban transit systems</li> </ul> <p>This class also includes:</p> <ul style="list-style-type: none"> <li>• the operation of school buses and buses for the transport of employees</li> <li>• passenger transport by man- or animal-drawn vehicles</li> </ul> <p>This class excludes:</p> <ul style="list-style-type: none"> <li>• ambulance transport (see NACE 86.90)</li> </ul>
	NACE 49.41: Freight transport by road	<p>This class includes all short- and long-distance road freight transport operations for hire or reward (and for own account) by road, such as:</p> <ul style="list-style-type: none"> <li>• logging haulage</li> <li>• stock haulage</li> <li>• refrigerated haulage</li> <li>• heavy haulage</li> <li>• bulk haulage, including haulage in tanker trucks including milk collection at farms</li> <li>• haulage of automobiles</li> <li>• transport of waste and waste materials, without collection or disposal</li> </ul> <p>This class also includes:</p> <ul style="list-style-type: none"> <li>• renting of trucks with driver</li> <li>• other types of road freight transport services</li> </ul> <p>This class excludes:</p> <ul style="list-style-type: none"> <li>• log hauling within the forest, as part of logging operations (see NACE 02.40)</li> <li>• distribution of water by trucks (see NACE 36.00)</li> <li>• operation of terminal facilities for handling freight (see NACE 52.21)</li> </ul>



Term used in the report	NACE codes	Description
		<ul style="list-style-type: none"> <li>• crating and packing activities for transport (see NACE 52.29)</li> <li>• post and courier activities (see NACE 53.10 and 53.20)</li> <li>• waste transport as an integrated part of waste collection activities (see NACE 38.11 and 38.12)</li> </ul>
	NACE 49.92: Removal services	This class includes: <ul style="list-style-type: none"> <li>• removal (relocation) services to businesses and households by road transport</li> </ul>

In this study, the scope of the analysis thus covers the following three levels:

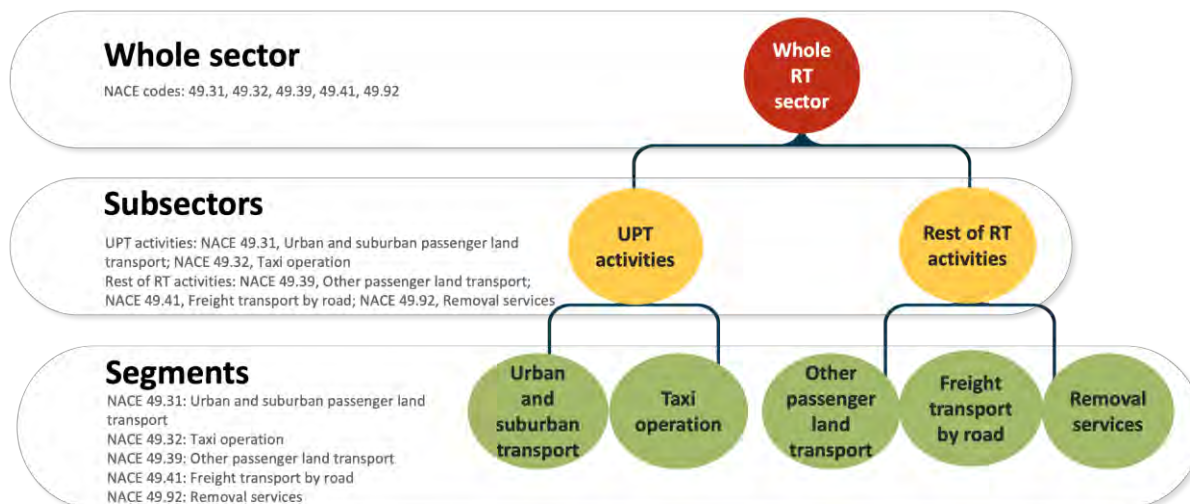
- the whole road transport sector, which covers all five of the NACE codes in question (see Table 1)
- urban public transport activities, which cover two segments of the whole road transport sector: NACE 49.31, 'Urban and suburban passenger land transport', and NACE 49.32, 'Taxi operation'
- rest of road transport activities,<sup>1</sup> which cover the other three segments of the whole road transport sector: NACE 49.39, 'Other passenger land transport'; NACE 49.41, 'Freight transport by road'; and NACE 49.92, 'Removal services'

This is shown visually in Figure 1.

<sup>1</sup> Several social partner organisations advocated against the terminology used, namely the entire ESSDC being referred to as 'road transport' and the committee's two working groups being referred to as 'urban public transport' and 'the rest of road transport'. The main arguments were that (1) the participants know the working group in question as the 'road transport working group' and not the 'rest of road transport working group' and (2), given the fact that around 75% of the sectoral workforce is employed in 'the rest of road transport' (see Table 6 in Section 1.2.3), its importance is not properly reflected by calling it 'the rest of road transport'. However, for the analytical purposes of this study, the terminology used serves to reflect that the entire sector is the road transport sector, which consists of urban public transport and the remaining road transport activities.

Figure 1: Levels of analysis in the study (sector coverage)

## Levels of analysis



**Note:** RT, road transport; UPT, urban public transport.

### Membership

Membership is another important aspect of representativeness. This study looks at two dimensions of membership: first, the geographical coverage of the EU-level organisations (for instance how many Member States an EU-level trade union/employer organisation has affiliates in) and, second, the organisational density of the national affiliates. An important aspect to be considered is whether the EU-level players organise most, or at least the most significant, national-level players (significant in terms of density and involvement in sector-related collective bargaining and/or policymaking).

The organisational capacity of the European social partners is analysed in terms of their ability to act on behalf of their members and to conclude binding agreements or commit to actions that can be implemented or monitored EU-wide through the support of their affiliates. To assess their capacity to negotiate, the institutional objectives and decision-making structures provided for in the social partners' statutes are considered, as are the expected outcomes of their actions, for instance whether their institutional mission allows for the possibility of negotiating and concluding agreements with other parties. The processes through which the social partners obtain mandates, support and approval from their member organisations during the negotiation process are also considered.

The involvement of social partners' members in national-level collective bargaining (or in social dialogue regarding sector-related policies) is important, as it shows that they have a mandate to negotiate on behalf of their members (at least at national level, which could then translate to a mandate to negotiate at EU level). Such a mandate, whether implicit or explicit, allows for negotiations to take place at European level that could potentially result in binding agreements or the drafting of European autonomous agreements, which require implementation by the social partners at national level, in line with their respective practices and traditions. The capacity to act autonomously to implement EU-wide agreements is an important aspect of the contribution that social partners' members make to the effectiveness of the ESSDC.

## Organisational capacity

Finally, representativeness also depends upon the social partners' structures and resources, their capacity to encourage the active participation of their members and combine the different interests of member organisations, and their ability to act autonomously at European level. Effective participation in the ESSDC is assessed in terms of social partners' presence at ESSDC meetings in the two years before the year of publication of this report (taking into account the COVID-19 pandemic, during which the ESSDC process took place virtually, with tools and procedures that did not always optimally support the capacity to negotiate).

## Data collection and quality control measures

Representativeness studies combine top-down and bottom-up approaches. The top-down approach examines all sector-related affiliates of the European Transport Workers' Federation (ETF), International Road Transport Union (IRU) and International Association of Public Transport (UITP), while the bottom-up approach looks at the organisations involved in road-transport-related collective bargaining and social dialogue in the EU Member States covered by this study and their membership of European-level organisations. Except where otherwise stated, this study draws on the country-level studies provided by the Network of Eurofound Correspondents (see Annex 7). So that questions were not left unanswered, estimates were used when precise quantitative data could not be obtained.

Thus, quantitative data (such as those used to calculate density rates) may stem from any of the following sources:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the relevant organisations
- estimates, expert opinions and assessments from the Network of Eurofound Correspondents or representatives of the organisations

Other sources used in this report include the European Commission's social dialogue texts database and the articles of association, statutes and by-laws of the EU-level sectoral social partner organisations.

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of preparing this study. First, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents, in 2022–2023.

Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions from the Network of Eurofound Correspondents and, where necessary, asked the national correspondents to revise them in 2023. A list of the national correspondents who contributed to this study can be found in Annex 7.

An overview of the data collected in this study was made available to the European social partners in the form of intermediary findings in September/October 2023 to allow their affiliates to double-check and comment on the interim findings. Once the data tables had been updated, the draft report was finalised in the second half of 2023 and further streamlined and finalised in early 2024.

From 17 May to 7 June 2024, social partners were consulted on the draft report. This was a first informal (pre-evaluation) consultation. Using their comments as guidance, the report was finalised and

prepared for formal written evaluation by the Eurofound industrial relations advisory committee (consisting of representatives of both sides of industry, as well as of governments and the European Commission), with the agreement of the European-level sectoral social partners identified in the report. The written evaluation took place from 20 June to 15 July 2024. After this formal evaluation, the report was edited and prepared for publication in the second half of 2024.

All relevant actors and organisations mentioned in this report were invited to check the consistency of the information in the report, to ensure that the bottom-up approach included all the relevant sector-related organisations from the Member States. As different social partner organisations reviewed the information on other organisations representing similar memberships in the same country and, if necessary, commented on the credibility or accuracy of that information, this process involved an element of mutual verification and recognition.

## History of the ESSDC

European social dialogue in the road transport sector began in the 1960s. After the European Commission issued its guidelines for a common transport policy in April 1961, followed by an action programme to implement this in May 1962, the social partners from the sector, at a conference in December 1963, declared themselves in favour of an effective form of consultation on social questions. Subsequently, Commission Decision 65/362/EEC (European Commission, 1965) of 5 July 1965 established a joint advisory committee on social questions in the road transport sector. Commission Decision 85/516/EEC (European Commission, 1985) of 18 November 1985 replaced this with a newly established joint committee on road transport. The liaison committees of the European section of the IRU (IRU Europe) and the Committee of Transport Workers' Unions of the European Community (now the ETF) were recognised as European social partners in this joint committee. Through Article 7(1)(d) of Commission Decision 98/500/EC (European Commission, 1998) of 20 May 1998, an ESSDC for the road transport sector replaced the joint committee (1985) and the joint advisory committee (1965). The road transport ESSDC was established in 2000 by the ETF and IRU Europe.

Since the UITP was not part of the establishment of the ESSDC, the UITP and IRU developed a partnership protocol that was signed on 19 May 2000 and added to a cooperation protocol that was signed on 28 September 2000. Part of this was a cooperation agreement to join forces in the framework of social dialogue, as referred to in point 5 of the partnership protocol and attached to the cooperation protocol. In that cooperation agreement, the UITP and IRU recognise each other mutually. The European section of the UITP (UITP Europe) recognises IRU Europe as representing road transport operators of all sizes, active in all sectors of the economy (Article 2.1), while IRU Europe recognises UITP Europe as representing operators of local passenger transport at EU level. The term 'local passenger transport' refers to urban transport and interurban transport operations. In Article 4 of the cooperation agreement, the practical arrangements are described in which at least two representatives from UITP Europe are invited to the ESSDC meetings.

Until 2001, the ETF and IRU signed all joint opinions. Since then, the UITP and ETF have jointly taken many initiatives (research projects and conferences) and signed numerous statements/agreements (see Section 3.7). More than a decade after the first memorandum of understanding, a new memorandum of understanding was reached between the IRU and UITP on 6 May 2014.

Regarding taxis and hire cars with drivers, the opinion of the IRU group on taxis and hire cars with drivers – a body in which the national representative trade associations of the taxi industry in Europe are represented – is that taxis and hire cars with drivers are an integral part of public transport, also

bearing in mind that a large part of their services are offered and activities are carried out and regulated at local level, within the urban and peri-urban environment. In some cases, for example in the Nordic countries, 50% of their activities are carried out under a public service contract, according to the IRU. Over recent years, the IRU and ETF have made two joint declarations focusing on taxi services, namely on 19 November 2014 and 16 March 2018.

In a letter of 9 February 2015, the UITP and ETF requested a separate urban public transport ESSDC, pointing to the specificities of multimodal urban public transport networks and listing the joint opinions reached between the ETF and UITP, their 2015–2016 work programme and the importance of urban public transport and its European social dialogue. The urban public transport activities were analysed in Eurofound’s 2017 railways representativeness study (Eurofound, 2017). NACE codes 49.31, ‘Urban and suburban passenger land transport’, and 49.32, ‘Taxi operation’, were also included in Eurofound’s 2015 road transport representativeness study (Eurofound, 2015), but were not analysed separately.

In a meeting with the European Commission, following the letter of 9 February 2015, it was announced that the UITP would be added to the list of organisations to be consulted under Article 154 of the TFEU and that, for urban public transport activities, a working group would function within the road transport ESSDC. As a representative employer organisation at EU level for both road transport and urban public transport, IRU Europe supported this approach. On 13 October 2023, a new request from the ETF and UITP was sent to the Commission to establish a separate urban public transport ESSDC.

## Agreements and other achievements by the road transport ESSDC

Over the years, the EU social partners in the road transport sector have cooperated on common projects, joint opinions, frameworks of action and other joint outputs. Table 58 in Section 3.7 shows the key achievements of the road transport ESSDC over the years. Since 1990, nearly 50 opinions, joint declarations, statements and other outputs have been realised between the sector social partners. This covers a wide range of activities, including over 20 joint statements, five joint opinions, five joint recommendations, six joint project reports, four policy orientations and three charters/common rules adopted – the latest one, on third-country drivers, was signed by the IRU and ETF on 19 April 2024 in the presence of Commissioner Nicolas Schmit (IRU, 2024).

Commitments to bipartite activities as part of European-level road transport social dialogue have been made in a multiannual work programme covering both road transport and urban public transport. The current work programme, for 2023–2024 (European Commission, undated-a), envisages a host of actions in the following areas: the efficient enforcement of the rules in the road transport sector; the implications of new patterns of mobility; the challenges of driver shortages; the attractiveness of the profession, its image and recruitment in road transport; and the topics of driver training, road safety and commercial road transport. As regards the urban public transport working group, actions planned for 2023–2024 include working together to help move urban public transport up the political agenda at EU level, ensuring EU funding is targeted towards public transport and increasing the attractiveness of the urban public transport sector.

In addition, the road transport social partners IRU and ETF have undertaken the following actions.

- They negotiated a formal agreement in 2008 on the reintroduction of the 12-day derogation into Regulation (EC) No 561/2006 on driving and rest time rules, based on a negotiating mandate issued by their decision-making bodies (in the IRU’s case the Passenger Transport Council), with the IRU’s

and ETF's negotiating teams meeting in several negotiating rounds before reaching an agreement. The agreed text was formally adopted by their decision-making bodies and served as the basis on which the legislators (the European Parliament and the Council) modified Regulation (EC) No 561/2006.

- They entered formally into negotiation on a social partner agreement (between the IRU and the FST (Federation of Transport Workers' Unions in the European Union), as the ETF was called at that time) on what was later to become Directive 2002/15/EC on the working time of mobile workers. This formal negotiation did not result in the signing of a formal agreement, but the European Commission took the points agreed on by the social partners and incorporated them into its own proposal, which became an EU law (Directive 2002/15/EC) in 2002.

A list of the activities and achievements of the urban transport social partners is included in Table 58 in Section 3.7.

## 1. Employment structure and trends in the sector

This chapter describes employment trends in the road transport sector in terms of the workforce and company structures. It outlines the size and composition of the workforce and the number and type of companies in the sector that are to be represented by the trade unions and employer organisations discussed in the following chapter.

### 1.1. Employment in the road transport sector

#### 1.1.1. Overall employment in the sector

As shown in Table 2, there are around 4.9 million workers in the road transport sector in the EU27. This constitutes 2.7% of the total employment in the EU.

Noteworthy is the large proportion of sectoral employment in Germany, France, Poland, Italy and Spain, as together these countries account for 61.5% of overall EU employment in the sector. As regards the importance of the sector as a percentage of the entire national workforce, this is particularly high in Lithuania, Estonia, and Latvia (all 4% or above of the entire national workforce).

Looking at employment by subsector across the EU, over 75% of the sector's workers are employed in the rest of road transport activities, covering passenger road transport, freight road transport and removal services. In turn, around 25% work in urban and suburban transport and taxi operations. This masks country variations, as, in some Member States, the proportions are around 80% and 20%, respectively (such as in the eastern European countries and France, Ireland and Italy). In Germany, on the other hand, the proportions are about 60% and 40%, respectively, and, in Greece, Cyprus and Malta, the workforce in urban public transport activities almost equals the workforce in the rest of road transport activities.

Table 2: Overall employment in the road transport sector, 2020

Member State	Number employed in the whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Proportion of whole EU sector, %	Number employed in urban public transport (NACE 49.31, 49.32)	Proportion of entire national workforce, %	Number employed in urban and suburban passenger land transport (NACE 49.31)	Number employed in taxi operation (NACE 49.32)	Number employed in the rest of road transport (NACE 49.39, 49.41, 49.92)	Proportion of entire national workforce, %	Number employed in other passenger land transport (NACE 49.39)	Number employed in freight transport by road (NACE 49.41)	Number employed in removal services (NACE 49.92)
EU27	4,936,988 <sup>2</sup>	100.0	1,285,323	0.7	734,721	550,602	3,790,233	2.0	506,928	3,218,440	64,865
DE	826,817	16.7	338,042	0.8	229,673	108,369	488,775	1.2	56,280	412,235	20,260
FR	624,955	12.7	80,198	0.3	80,198	n.a.	544,757	2.0	135,708	396,407	12,642
PL	618,839	12.5	97,577	0.6	61,527	36,050	521,262	3.2	32,848	486,364	2,050
IT	514,386	10.4	117,425	0.5	79,280	38,145	396,961	1.8	37,834	353,593	5,534
ES	453,670	9.2	53,163	0.3	53,163	n.a.	400,507	2.0	51,364	344,874	4,269
RO	233,781	4.7	52,793	0.7	35,471	17,322	180,988	2.4	22,771	157,848	369
NL	181,704	3.7	31,169	0.4	n.a.	31,169	150,535	1.8	23,290	122,715	4,530
CZ	169,054	3.4	31,489	0.6	29,421	2,068	137,565	2.8	8,544	128,578	443
BE	150,000 <sup>3</sup>	2.6	12,515	0.3	4,306	8,209	69,330	1.4	7,038	59,775	2,517
SE	127,049	3.0	41,869	0.9	19,500 <sup>4</sup>	22,369	85,180	1.8	3,998	77,811	3,371
LT	116,963	2.4	11,332	0.8	8,278	3,054	105,631	7.8	7,045	98,320	266
PT	116,720	2.4	30,153	0.6	7,665	22,488	86,567	1.9	11,468	74,512	587
BG	100,394	2.0	18,000	0.6	13,021	4,979	82,394	2.7	9,519	72,097	778
EL	95,002	1.9	44,492	1.1	9,961	34,531	50,510	1.3	12,121	38,052	337
IE	93,203	1.9	15,103	0.6	n.a.	15,103	78,100	3.3	53,943	23,737	420

<sup>2</sup> The total number of workers in urban public workers and the rest of road transport adds up to a slightly higher number of around 5 million. This is because some workers are classified in both segments.

<sup>3</sup> This number is based on information provided by FBAA, an IRU affiliate in Belgium. The figures for the numbers employed in urban public transport and the rest of road transport do not add up to the total of 150,000, as they are from a different data source, namely Eurostat.

<sup>4</sup> This number is based on information provided by an ETF affiliate in Sweden.



Representativeness of the European social partner organisations: Road transport sector

Member State	Number employed in the whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Proportion of whole EU sector, %	Number employed in urban public transport (NACE 49.31, 49.32)	Proportion of entire national workforce, %	Number employed in urban and suburban passenger land transport (NACE 49.31)	Number employed in taxi operation (NACE 49.32)	Number employed in the rest of road transport (NACE 49.39, 49.41, 49.92)	Proportion of entire national workforce, %	Number employed in other passenger land transport (NACE 49.39)	Number employed in freight transport by road (NACE 49.41)	Number employed in removal services (NACE 49.92)
HU	89,534	1.8	8,619	0.2	n.a.	8,619	80,915	1.8	n.a.	80,506	409
AT	79,082	1.6	16,622	0.4	16,622	n.a.	62,460	1.5	n.a.	61,276	1,184
FI	66,663	1.4	22,069	0.9	7,317	14,752	44,594	1.8	n.a.	42,953	1,641
SK	62,978	1.3	9,115	0.4	6,238	2,877	53,863	2.1	5,537	47,905	421
DK	55,343	1.1	17,892	0.7	10,508	7,384	37,451	1.4	5,403	30,536	1,512
HR	45,200	0.9	11,885	0.7	6,390	5,495	33,315	2.0	6,778	26,509	28
SI	34,499	0.7	2,183	0.2	1,273	910	32,316	3.4	3,437	28,807	72
LV	33,265	0.7	5,794	0.7	3,211	2,583	27,471	3.3	1,343	25,549	579
EE	25,700	0.5	3,000	0.5	n.a.	n.a.	22,700	3.6	n.a.	n.a.	n.a.
LU	11,842	0.2	n.a.	n.a.	n.a.	n.a.	11,842	3.9	3,973	7,579	290
CY	5,322	0.1	2,553	0.6	1,286	1,267	2,769	0.6	624	2,097	48
MT	5,023	0.1	2,718	1.0	1,564	1,154	2,305	0.9	1,005	1,221	79

**Notes:** *n.a.*, not available. Data for Estonia and Ireland were missing in the Eurostat data and were taken from contributions submitted by the Network of Eurofound Correspondents. There were no data for urban public transport activities in Luxembourg.

**Source:** Eurostat, structural business statistics (SBS)

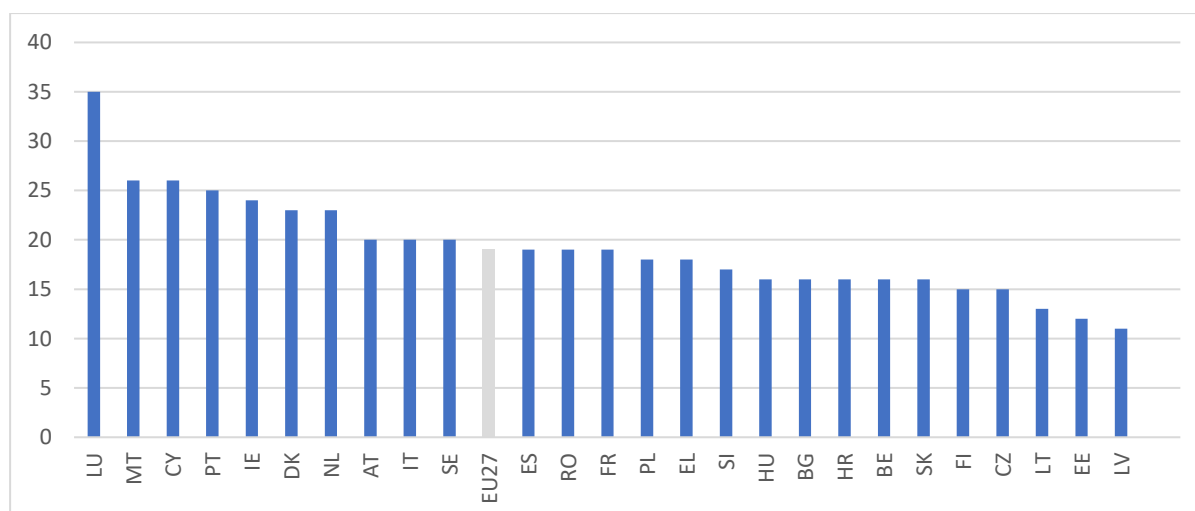
When preparing a sectoral overview, it cannot be overlooked that the sector is often viewed as one large sector, including the storage sector. The most relevant example of this is the Labour Force Survey,<sup>5</sup> which provides data for the entire transport and storage sector (the figures are thus much greater than those for the road transport sector presented in Table 2).

The European Centre for the Development of Vocational Training (Cedefop) skills intelligence online tool (Cedefop, undated) gives the following key statistics related to the entire transport sector. Around nine million people were employed as drivers or vehicle operators in 2018. Of these, 75% were in the transportation, manufacturing, and wholesale and retail trade sectors. Employment in this occupation remained stable between 2006 and 2018. Little employment change is expected from 2018 to 2030. The entire employment demand – which is estimated to be five million between 2018 and 2030 – will be driven by the need to replace workers who will leave the occupation for various reasons. There is a strong gender imbalance in the workforce in favour of male employees. The three key workplace tasks and skills of drivers and mobile plant operators are routine, creativity, and resolution and autonomy.

In general, the transport sector (including urban public transport activities and the rest of road transport) has been significantly affected by severe labour shortages in recent years. Driver shortages have been affecting the global road freight market for around 15 years. The issue comes as the pool of truck drivers is contracting but demand for transport is rising. The COVID-19 pandemic has further exacerbated the already significant issue of driver shortages, as new drivers have been unable to train and take their tests. Even before the pandemic became a serious cause for concern in the industry, the lack of drivers in the road transport industry was at an all-time high, with many of its underlying issues being long-term challenges. The logistics industry has been issuing warnings about driver shortages for many years, but a combination of the above-mentioned factors plus the ongoing structural issues restricting the supply of drivers has brought us to a crisis point. A recent research paper on European driver shortages assessed the scale of the crisis across Europe, with the total shortfall of drivers now surpassing 400,000 (Transport Intelligence, 2021).

At the same time, employment in the sector has increased in the EU Member States (Figure 2). The European average increase in employment is 19.4% and, in 10 countries, the increase exceeded this. An increase of 25% or more was recorded in Luxembourg, Malta, Cyprus and Portugal.

Figure 2: Relative change (%) in employment in the transportation and storage sector, 2010–2020



Source: Eurostat, Labour Force Survey

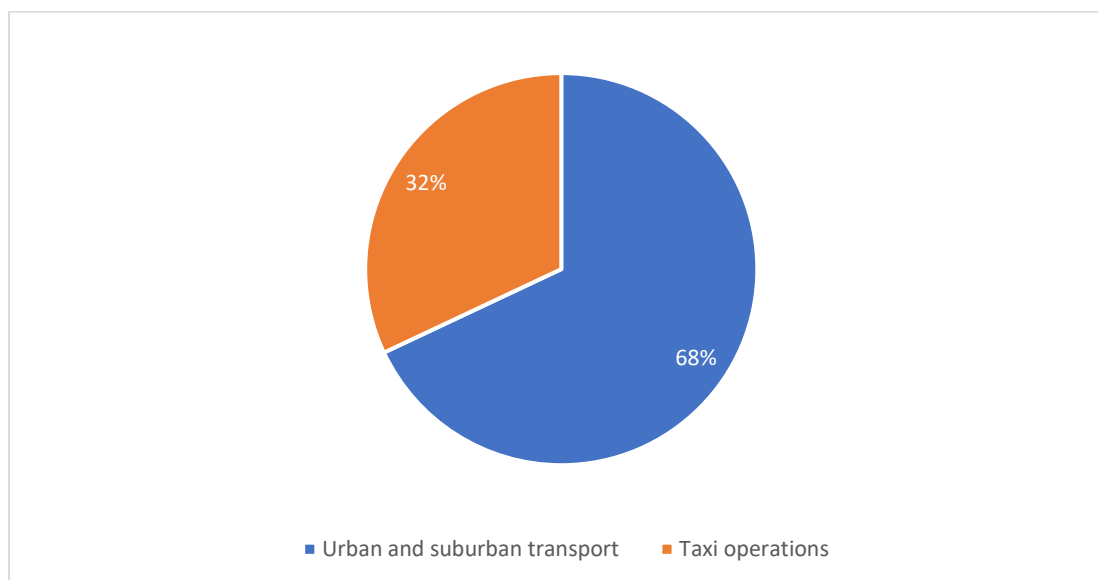
<sup>5</sup> The Labour Force Survey database is available at <https://ec.europa.eu/eurostat/web/lfs/database>.

### 1.1.2. Employment by subsector

This section focuses on employment in urban public transport and the rest of road transport, using Eurostat structural business statistics (SBS) from 2020.

In urban public transport activities (Figure 3), most workers were employed in urban and suburban transport companies (NACE 49.31, 68%). In contrast, 32% worked in taxi operations (NACE 49.32), an area in which most companies are small and often are solo self-employed.<sup>6</sup>

Figure 3: Proportion of employment in urban public transport activities in the EU27, 2020



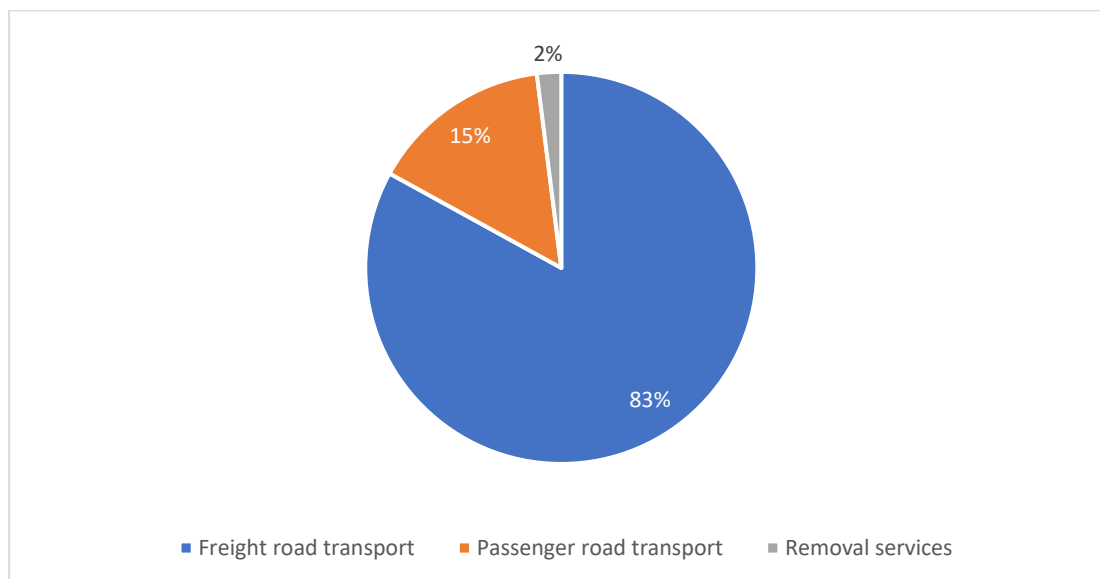
Source: Eurostat, SBS

In the rest of road transport (Figure 4), 83% of workers were employed in freight road transport companies (NACE 49.41), 15% were employed in passenger road transport (NACE 49.39) and 2% were employed in removal service companies (NACE 49.92).

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<sup>6</sup> See Table 4, indicating that, on average in the EU27, taxi companies employ 1.9 employees; a median figure is not available.

Figure 4: Proportion of employment in the rest of road transport in the EU27, 2020



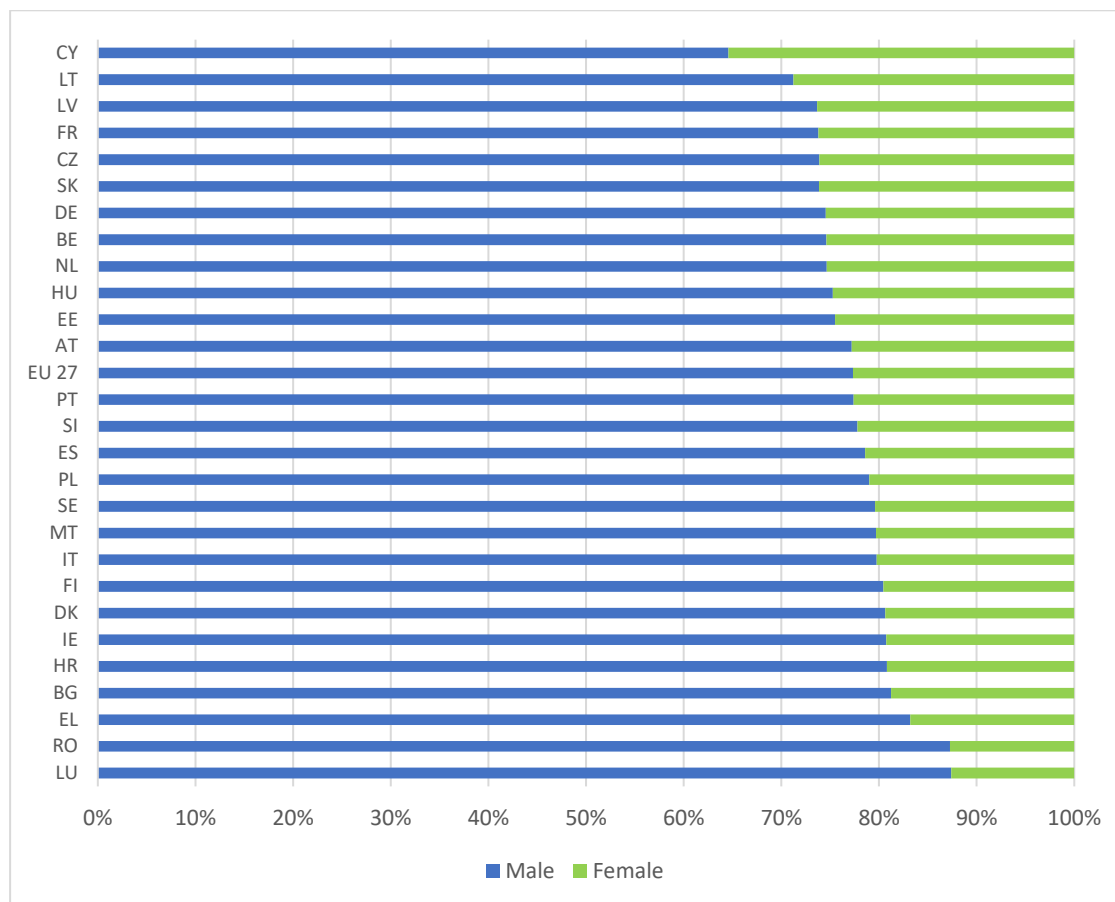
Source: Eurostat, SBS

### 1.1.3. Demographics of the sector

Transport is a major provider of jobs in Europe (1 in 20 jobs, 5% of the labour force), but it is also an ageing sector (with one-third of its workers over 50 years old). In road freight transport, the ageing of the truck-driving workforce is happening even faster than in the transport workforce in general.

The transport sector is traditionally dominated by a male workforce, with a share of 77% men at EU level in 2020. In Greece, Romania and Luxembourg, more than 82% of the workers in this sector are men, while Cyprus is the only country with less than 70% men working in this sector (Figure 5).

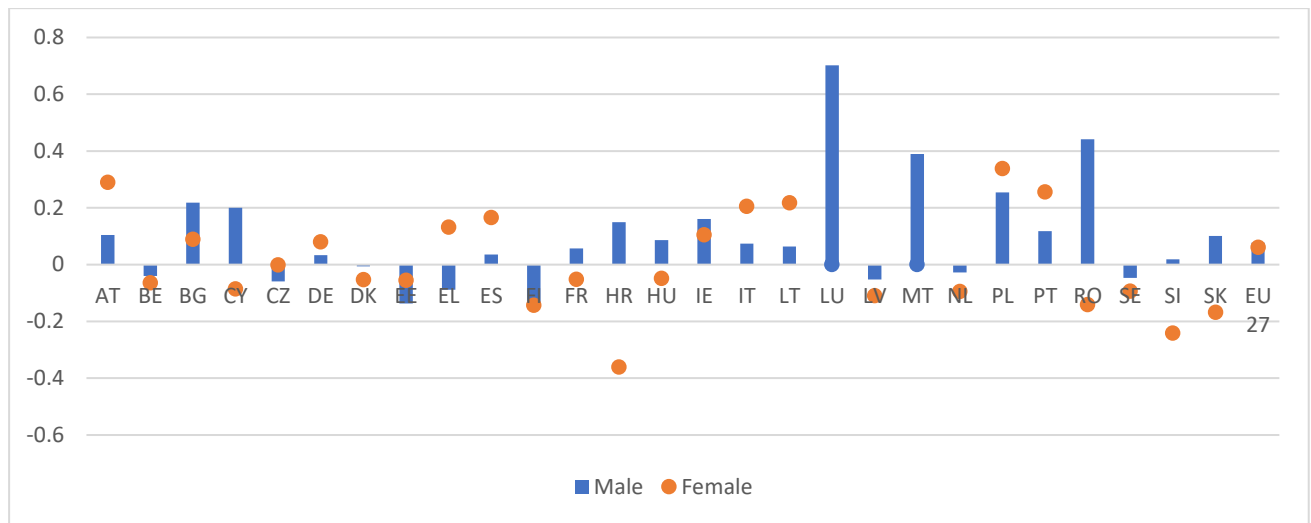
Figure 5: Gender distribution of the workforce in the transport and storage sector, 2020



Source: Eurostat, Labour Force Survey

It should be noted that the proportion of male workers in the transport and storage sector had decreased in 2020 compared with 2010 in Belgium, Czechia, Estonia, Finland, Greece, Latvia, the Netherlands and Sweden (Figure 6). At the same time, an increase in female workers was registered in 11 Member States, with the greatest increases recorded in Austria, Poland and Portugal. In 14 Member States, the proportion of female workers in the transport and storage sector decreased, with the greatest decrease registered in Croatia (-0.36%).

Figure 6: Relative change (%) in the employment of female and male workers in the entire transport and storage sector, 2010–2020



**Note:** For Germany, data for Q2 2021 were used, as data for 2020 were not available.

**Source:** Eurostat, Labour Force Survey

#### 1.1.4. Main forms of employment in the sector

Most of the workers in the transport sector have a secondary-level education and have undergone on-the-job training and certification.

The main professions in the sector are the following, although this varies depending on the national regulations of the professions in each country:

- bus driver
- bus driver, transit and intercity
- bus driver, school
- public transportation inspector
- route driver
- route supervisor
- scheduler
- subway operator
- van driver
- taxi driver
- chauffeur
- courier
- dispatcher
- fleet coordinator/supervisor/manager
- shuttle car operator
- taxi driver

- truck driver/supervisor
- traffic manager/clerk/supervisor
- traffic/rate analyst
- transportation analyst/manager/inspector/supervisor
- travel coordinator/manager
- travel manager
- material mover/hand labourer (moving materials such as freight or stock)

According to the Network of Eurofound Correspondents, standard forms of employment prevail in the sector across most EU Member States.

## 1.2. Companies in the road transport sector

Table 3 shows the total number of companies in the whole road transport sector in 2018. Across the EU27 in 2018, there were around 850,000 companies in the sector, with 65% operating in the rest of road transport and 34% operating in urban public transport.

Across the NACE codes, most companies (523,551) were operating in freight road transport (NACE 49.41), followed by 270,448 companies in taxi operations (NACE 49.32) and 14,024 in urban and suburban transport (NACE 49.31). The smallest numbers of companies were reported in passenger road transport (13,963, NACE 49.39) and removal services (11,260, NACE 49.92). This distribution is further illustrated in Figure 7.

Table 3: Total number of companies in the whole road transport sector, 2018

Member State	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)		Urban public transport activities		Rest of road transport		
	Number	Proportion of whole EU sector, %	Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)
EU27	846,802 <sup>7</sup>	100	14,024	270,448	13,963	523,551	11,260
FR	163,849	19	1,299	60,204	196	101,145	1,005
PT	116,976	14	242	12,244	3,637	99,974	879
CY	65,491	8	10	1,027	1,268	61,576	1,610
PL	48,506 <sup>8</sup>	6	3,637	38,465	75	6,152	177
EE	42,291	5	23	387	3,560	35,605	2,716
HR	34,713	4	58	1,073	1,299	30,753	1,530
DK	34,668	4	90	2,612	94	31,668	204
EL	34,522	4	1,025	28,836	n.a.	4,661	n.a.
SI	33,844	4	32	1,222	911	31,574	105

<sup>7</sup> The totals across the five categories add up to slightly fewer 833,246 companies as in some cases companies have been estimated in several categories.

<sup>8</sup> This is likely to be an underestimate.

## Representativeness of the European social partner organisations: Road transport sector

Member State	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)		Urban public transport activities		Rest of road transport		
	Number	Proportion of whole EU sector, %	Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)
DE	33,719	4	3,560	25,116	90	4,680	273
IT	32,867	4	1,268	26,104	58	5,430	7
RO	19,205	2	911	10,211	242	7,696	145
FI	17,898	2	104	7,298	32	10,255	209
SE	17,821	2	261	8,595	104	8,722	139
ES	17,705	2	196	n.a.	1,025	16,371	113
AT	17,656	2	75	4,672	9	12,144	756
IE	17,387	2	n.a.	14,092	23	3,175	97
CZ	16,413	2	94	1,970	517	13,553	279
MT	14,605	2	n.a.	n.a.	n.a.	14,438	167
BE	13,934 <sup>9</sup>	2	178	n.a.	200	n.a.	n.a.
BG	12,927	2	517	3,899	178	7,958	375
NL	10,787	1	9	10,778	n.a.	n.a.	n.a.
HU	7,356	1	n.a.	6,938	1	394	23
LT	7,058 <sup>10</sup>	1	290	3,283	104	3,130	251
LU	6,680	1	1	189	290	6,066	134
SK	6,256	1	40	477	40	5,648	51
LV	1,668	0	104	756	10	783	15

**Note:** *n.a.*, not available.

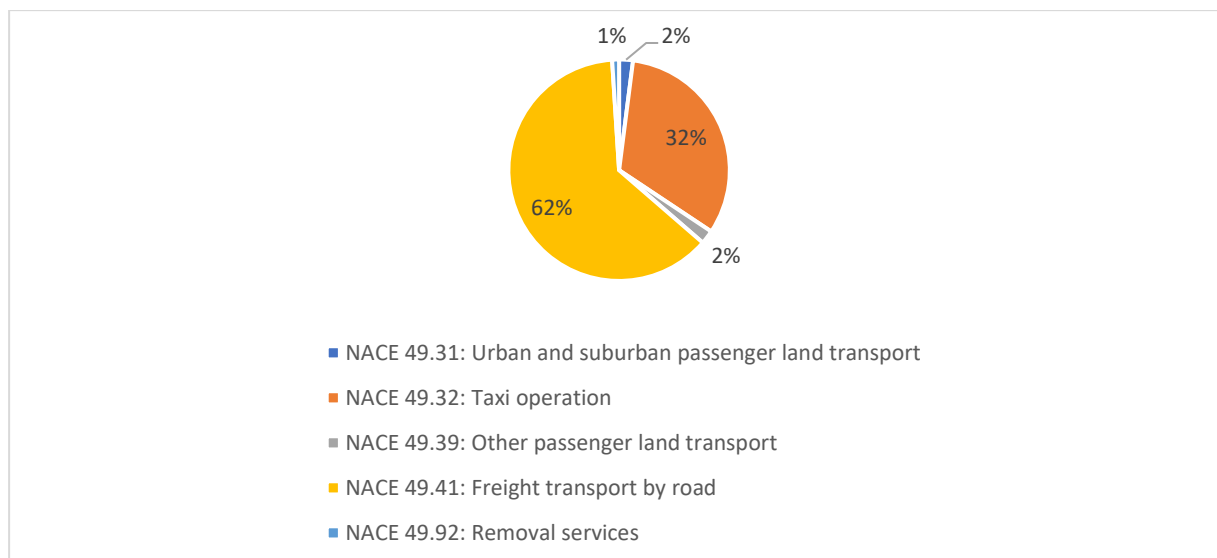
**Source:** Eurostat, SBS

<sup>9</sup> This updated figure was provided by FBAA, an IRU affiliate in Belgium.

<sup>10</sup> This is likely to be an underestimate.



Figure 7: Proportion of companies in the different segments of the road transport sector in the EU27, 2018



**Note:** The percentages add up to 99%, as for some countries data on all five segments are not available.

**Source:** Eurostat, SBS

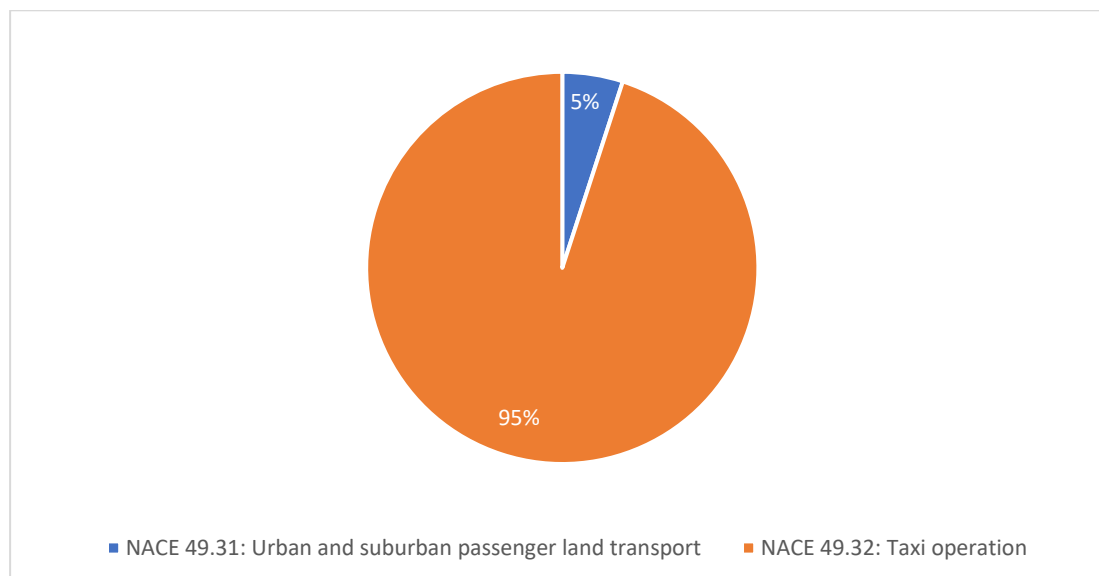
The country profiles in Annex 1 present the largest companies, in terms of their workforce, in the entire road transport sector and in urban public transport and the rest of road transport separately.

The following sections analyse the distribution of companies in urban public transport and the rest of road transport.

### 1.2.1. Companies in urban public transport

A very high proportion of urban public transport companies are in the taxi operation category (95%), and these are often microenterprises (such as entrepreneurs or solo self-employed workers) or companies with fewer than 50 employees (Figure 8).

Figure 8: Proportion of companies in the different urban public transport activities in the EU27, 2018



Source: Eurostat, SBS

As shown in Table 3, the number of companies in urban public transport activities reached over 284,000 across the EU27 in 2018. Most of these companies were in taxi operations (NACE 49.32) and around 14,000 companies were active in urban and suburban transport activities (NACE 49.31). Poland, Germany and France account for 61% of all companies in urban and suburban passenger land transport (NACE 49.31). In taxi operations (NACE 49.32), there is less concentration in specific Member States, but the same three countries still account for 46% of taxi companies across the EU.

The EU average size of company within urban public transport activities differs between the two segments (Table 4). Among taxi operators, average company size is 1.9 employees per company, indicating the micro nature of such companies (data on the proportion of solo self-employed workers are not available). In contrast, the average company size in urban and suburban passenger land transport is much larger, at 53 employees per company.

Table 4: Average number of employees per enterprise in urban public transport activities, 2018

Member State	Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)
EU27	53.0	1.9
AT	219.1	No data
BE	24.6	3.2
BG	28.5	1.6
CY	131.9	1.4
CZ	317.3	1.2
DE	72.2	6.5
DK	118.7	4.4
EL	10.4	1.3
ES	260.9	No data
FI	No data	2.1
FR	61.9	No data
HR	106.8	2.0
HU	No data	1.2

Member State	Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)
IE	No data	1.2
IT	65.0	1.6
LT	30.2	1.2
LV	80.2	4.7
NL	No data	3.0
PL	17.7	1.1
PT	31.7	1.4
RO	38.6	2.1
SE	161.1	3.2
SI	31.6	2.3
SK	202.0	1.8

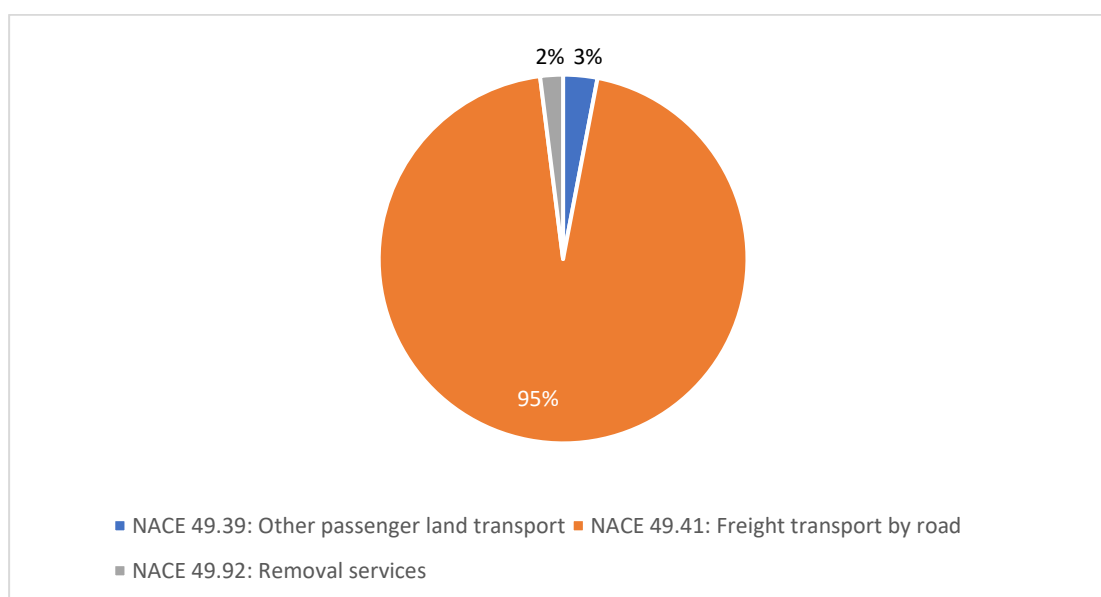
**Notes:** No data were available for Estonia, Luxembourg or Malta; green shading indicates a value higher than the EU average.

**Source:** Eurostat, SBS

### 1.2.2. Companies in the rest of road transport

As shown in Figure 9, most of the companies in the rest of road transport are in freight road transport (95%). Passenger road companies account for 3% of companies and removal companies account for 2% in the rest of road transport.

**Figure 9: Proportion of companies in the different parts of the rest of road transport in the EU27, 2018**



**Source:** Eurostat, SBS

Table 5 provides an indication of the size of companies in the rest of road transport as the average number of employees per enterprise. The companies in the rest of road transport are, on average, small enterprises, with an EU average of around six employees per company.

Table 5: Average number of employees per enterprise in the rest of road transport, 2018

Member State	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)
EU27	6	5.8	5.9
AT	10.0	9.9	6.5
BE	5.3	7.6	5.8
BG	5.2	5.4	2.3
CY	2.8	2.7	3.1
CZ	10.2	4.1	2.5
DE	15.3	12.0	9.4
DK	9.0	6.5	5.5
EE	5.1	5.2	No data
EL	1.8	2.2	2.7
ES	No data	3.3	4.2
FI	No data	No data	No data
FR	No data	11.7	8.5
HR	8.0	4.2	2.6
HU	5.8	5.6	1.9
IE	1.9	4.9	No data
IT	5.4	5.6	3.3
LT	2.1	13.5	1.9
LU	No data	19.2	11.5
LV	11.7	8.4	3.2
MT	4.6	No data	No data
NL	No data	10.2	5.9
PL	2.8	4.6	2.0
PT	2.7	9.5	3.2
RO	5.4	5.1	3.1
SE	8.0	5.8	7.8
SI	5.5	4.9	1.3
SK	2.9	4.9	2.3

**Note:** Green shading indicates a value equal to or higher than the EU average.

**Source:** Eurostat, SBS

### 1.2.3. Comparison of the workforce and companies in urban public transport and the rest of road transport

Table 6 summarises how the workforce and companies are split across the whole road transport sector and within the two subsectors. Several points emerge from this analysis. As regards urban public transport, the vast majority of companies are in taxi operations (NACE 49.32), whereas the largest proportion of the workforce is in urban and suburban transport (NACE 49.31). In urban and suburban transport, this equates to there being few companies with many employees. In contrast, in taxi operations, the opposite trend is observed: many companies with small numbers of employees.

Table 6: Proportions of the whole road transport workforce and companies in the different parts of the sector in the EU27, 2020

	Urban public transport		Rest of road transport		
	Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)
Number of employees	1,285,323		3,790,233		
	734,721	550,602		734,721	550,602
Proportion of workforce in the whole road transport sector, %	26		77		
	15	11	10	65	1 <sup>11</sup>
Proportion of workforce within the subsector, %	57	43	13	85	2
Proportion of companies in the whole road transport sector, %	34		65		
Proportion of companies within the subsector, %	5	95	3	95	2

Sources: Network of Eurofound Correspondents, 2023; Eurostat, SBS

### 1.3. Key trends in urban public transport and the rest of road transport

In this section, key trends are considered first for urban public transport activities and then for the rest of road transport, reflecting the different aspects in each subsector, based on contributions submitted by the Network of Eurofound Correspondents for this representativeness study.

#### 1.3.1. Key trends in urban public transport activities

The key trend identified from the contributions provided by the Network of Eurofound Correspondents relates to the **company size and its influence on the level of organisation between the two different segments in urban public transport**. There is a divide between the larger companies operating in urban and suburban passenger transport and small companies in taxi operations, with it being easier to organise workers and companies in the former and harder in the latter.

Specifically, across most Member States, companies in urban and suburban passenger transport systems (NACE 49.31) are mostly publicly owned and are rather large in size. The majority of companies are well established and have been operating for many decades. Urban public transport is still characterised and dominated by public service providers (despite the significant number of subcontractors (private bus companies) in several Member States; see Table 9). In urban and suburban passenger transport, organising workers is somewhat easier than in taxi operations. Large providers generally all have a worker's representative structure, such as a works council, another body involved in collective bargaining at company or sectoral levels, or both (although this is not necessarily the case in southern, central or eastern Europe or the Baltic states). In addition, rather standard forms of employment are generally the norm, via employment contracts of a definite or an indefinite nature.

In contrast, in most Member States, companies in taxi operations (NACE 49.32, including private hire vehicles with a driver) are mostly privately owned companies and there is a high proportion of small

<sup>11</sup> The percentages in this row add to 102% as workers in some cases were classified in several categories.

and medium-sized enterprises. Organising workers in taxi operations has proven to be quite difficult due to the specificities of the workforce and the employer structure. The segment is characterised by mostly self-employed workers and/or small to very small companies.

Another important consideration in the context of **taxi operations** is how they are regulated, namely whether they are considered part of urban public transport or as the commercial transport of passengers linked to the transport of passengers by road activities. As shown in Table 7, in most Member States, taxis are considered as the commercial transport of passengers linked to the transport of passengers by road activities. In contrast, in nine Member States, taxis are considered part of urban public transport. For instance, in Finland, as taxi operations are considered part of urban public transport, they are often used for school rides and for public transportation in rural areas where other forms of urban public transport are rare. In Germany, this link is established via legal regulations, as taxi operations and operations of private hire vehicles with drivers are regulated by the Passenger Transport Act (Personenbeförderungsgesetz) and are part of urban public transport. In Sweden, taxi operations are part of urban public transport, with Section 14 of the Public Transportation Law (2010:1065) stipulating that the regional transport authority has to ensure a sufficient taxi coverage in the region as part of the urban public transport provision.

**Table 7: Link between taxi operations (NACE 49.32) and urban and suburban transport activities (NACE 49.31)**

Type of link	Number of Member States	Member States
Taxis are considered part of urban public transport	9	DE, EL, ES, FI, HU, IE, IT, RO, SE
Taxis are considered an activity of commercial transport of passengers linked to the transport of passengers by road activities	17	AT, BE, BG, CY, CZ, DK, EE, HR, LT, LU, LV, MT, NL, PL, PT, SI, SK

**Note:** No information for France.

**Source:** Network of Eurofound Correspondents, contributions on rest of road transport, 2023

Finally, an important development is the increasing prominence of subcontracting in urban public transport activities, as reported in Table 8. The widespread practice of subcontracting was reported in nine Member States. The degree to which subcontractors are represented by the relevant social partners varies between Member States. In some Member States, subcontractors are not very strongly organised (such as in Romania or in taxi operations in Cyprus). On the other hand, in several countries, subcontractors are represented by the same urban public transport trade unions and employer organisations.

Table 8: Degree of subcontracting in urban public transport activities (taxi operations (NACE 49.32) and urban and suburban transport activities (NACE 49.31))

Degree of subcontracting	Number of Member States	Member States
Widespread	9	BE CY, HU, MT (in taxi operations) DK, IT, NL, SE (organised by the same urban public transport unions and employer organisations) RO (lack of organisation)
Not widespread	13	AT BG (no organisation) CZ DE (organisation differs for workers and companies) ES (prohibited) FI HR (no organisation) IE LT LU LV PT SI

**Note:** No information on Estonia, France, Greece, Poland or Slovakia.

**Source:** Network of Eurofound Correspondents, contributions on rest road transport, 2023

### 1.3.2. Key trends in the rest of road transport

The key factor affecting the capacity of employer/business organisations to organise the companies in the sector and of the trade unions to organise their workers is the **small company size in urban public transport taxi activities**. In contrast, **urban public transport providers in many large urban centres are among the largest employers in the cities**. In the contributions submitted by the Network of Eurofound Correspondents, the experts consulted pointed out that the activities in the rest of road transport are dominated by small companies and microenterprises, and such industrial structures are harder to organise for employer organisations and also make it harder for trade unions to unionise workers. The large number of small companies and self-employed drivers in the freight road transport segment poses a challenge to union-organising strategies, compared with other road transport subsectors. Consequently, works councils (where such structures are a feature of the industrial relations system) exist only in larger road transport companies (as reported in Germany).

The expected **impact of the green transition** on labour shortages is an issue to be considered in the rest of road transport, but few assessments were reported by the Network of Eurofound Correspondents. In Germany, for example, social partners considered that the green transition does have an impact on the sector but does not seem to influence employment levels much. Few national correspondents reported the scale of the impact of the green transition on supply chains. However, one example of an impact was given in Poland, where, following the green transition, the cost of services will definitely grow given that most functioning trucks are old cars fuelled by oil. Few national correspondents detailed the impact of the green transition on the health and safety of drivers. Where such assessments were made, it was reported that the social partners expect such impacts to be fairly

neutral (for example in Bulgaria and the Netherlands) or positive (as in Poland, where the health and safety of drivers might improve thanks to increased air quality, which is currently poor because of the intensity of road transport in Poland).

The members of the Network of Eurofound Correspondents reported different levels of **impact of digitalisation and automation** on the rest of road transport activities in their countries. On one hand, such impact has been reported to be limited in the sector or was an issue on which the social partners did not comment (for example in Austria and Belgium). In other countries, the impact of digitalisation has been reported to be more pronounced. For instance, digitalisation is a major issue for the sector in Germany. According to Ver.di, 90% of new investments in the sector go into IT and 90% of recently concluded company agreements relate to the employment of new software. In Spain, the introduction of digital technologies such as the digital tachograph and other active security systems have contributed to the improvement of the occupational health and safety of professional drivers, but the physical and psychosocial demands of the job are still high and risky, particularly for an ageing workforce. In the Netherlands, new technologies and automation require new skills from workers. Many older workers have to get extra training to stay up to date, and this is often not happening soon enough, leading to risks and potentially further shortages.

The rest of road transport activities have been severely affected by the **war in Ukraine** and its consequences on fuel prices and, in some countries, the shortage of drivers from Ukraine. The war's impact on fuel prices was reported in all contributions from the Network of Eurofound Correspondents for the rest of road transport. Increases in fuel prices and in the wages of sector workers have had a significant impact on the rest of road transport. Costs increasing significantly (especially at the peak of the energy crisis) has led to many small companies struggling to stay in business. The increase in demand following the COVID-19 crisis and lockdowns did not sufficiently compensate for these difficulties within the subsector. Several country-specific impacts have also been reported by the Network of Eurofound Correspondents. For example, Bulgarian hauliers have lost traditional markets in Ukraine due to the hostilities, as well as in Russia and Belarus due to the embargo on many goods and the ban on EU hauliers in these countries. The shortage of drivers from Ukraine has been described as an issue that mainly concerns companies based in Lithuania and Poland, which hold a 20% market share in Germany.

#### 1.4. Overlaps between the different segments in the sector

Finally, the sector is also characterised by **several overlaps between its different activities and segments**. For example, the inclusion of taxis as public transport means overlaps with passenger transport with small numbers of passengers. Moreover, in most cases, taxi transport is not limited to urban areas. On top of this, taxi services have become mixed with car sharing, especially in the context of platform work in the urban transportation context. Another example is the overlap in the outsourcing of urban public transport lines to passenger bus companies, which would be formally considered under the rest of road transport activities.

A key distinction and overlap highlighted by the Network of Eurofound Correspondents was the **link between the companies in road passenger transport engaged in longer distance transport and those active in urban public transport activities**. Here, the situations in Member States differ. As shown in Table 9, in 13 Member States, often the same companies provide both services. For example, in Czechia, some companies operating long-distance passenger transport also operate urban and suburban transport. These are usually private trading companies, for example Arriva. In Austria, there



are large overlaps, especially regarding bus transport, as several companies operate in both subsectors.

The same is true in Germany, where the membership of the BDO (an IRU member association) is broken down into 1,592 companies active in urban public transport and 2,454 BDO members active in the road transport segment. However, in Denmark, the four largest urban public transport companies are members of an IRU member association, the DPT. In contrast, in 10 Member States, there are few or no overlaps, as there are different companies operating in the two segments of the sector. For example, in Poland, urban public transport is still strongly regulated, mostly in the public sector, while road passenger transport was privatised to a greater extent during the 1990s.

**Table 9: Link between the companies in road passenger transport engaged in longer distance transport and those active in urban public transport**

Type of link	Number of Member States	Member States
Large/some overlaps between long-distance road transport and urban public transport (largely private bus operators)	13	AT, CZ, DE, EE, EL, ES, HR, HU, IE, LV, SE, SI, SK
Few overlaps, different operators in two activities	10	BE, BG, CY, DK, FI, IT, LT, NL, PL, RO

**Notes:** No information on France or Portugal. Not relevant to Luxembourg or Malta due to their small size.

**Source:** Network of Eurofound Correspondents, contributions on rest of road transport, 2023

## 2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the road transport sector. A list of the trade union abbreviations, their full names in the original language and their full names in English can be found in Annex 2, and the same information on the employer organisations can be found in Annex 3. The industrial relations landscape is presented for each Member State separately in the country profiles in Annex 1.

This study has identified a total of 114 sector-related trade unions and 110 sector-related employer organisations in the EU27. The methodology applied for the inclusion of national-level organisations is described in the 'Introduction' and is standard for all representativeness studies in this series. Overall, there is at least one sector-related organisation for employees in all 27 Member States and at least one sector-related organisation representing employers' interests in 26 of the Member States (Cyprus has no employer organisation).

Table 10 illustrates that there is only one sectoral trade union per country in Estonia and Latvia. Spain has the most trade unions in the sector (14), followed by Portugal (11) and Greece (8). The highest number of employer organisations was identified in France (14), followed by Belgium (8) and Spain (8). Two countries have just one employer organisation (Croatia and Romania).

Some employer organisations are classified as business associations in their national contexts. Their inclusion stems from their membership of a European-level social partner organisation relevant to this study or from being considered representative in their national contexts (see also 'Introduction'). The Network of Eurofound Correspondents specified this classification for each organisation based on the information received from the organisations (Tables 11 and 12). The data indicate that, across the sector, most organisations are either employer organisations or considered to be both employer organisations and business associations. Business associations are the minority in the sector (16%). The business associations in the sector are considered representative in the national sectors' contexts and have thus been included in the study. Annex 8 provides further information about the 18 business associations included in the study and the 13 organisations for which no data were available on their status as either an employer organisation or a business association.

Table 10: Number of employer organisations, business associations and organisations considered to be both employer organisations and business associations in the sector in the EU27

Segment of the sector	Total number of organisations	Number of employer organisations	Number of organisations considered to be both employer organisations and business associations	Number of business associations	Number of organisations for which there are no data
Total	110	68	10	18	14
Whole road transport (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	28	15	5	3 (all representative)	5
Only urban public transport (NACE 49.31, 49.32)	36	24	1	5 (all representative/ consulted by the government)	6
Only rest of road transport (NACE 49.39, 49.41, 49.92)	46	29	4	10 (all representative)	3

Source: Network of Eurofound Correspondents, 2022

The EU average number of sectoral trade unions per Member State is 4.1, which is in line with the averages recorded for other sectors (Eurofound, 2019). For employer organisations, the EU average is 4.2 per Member State, indicating a much higher degree of fragmentation in terms of employer organisations than in most other sectors.

Table 11: Number of trade unions/professional associations and employer organisations/business associations in the whole road transport sector

Member State	Number of trade unions	Number of employer organisations
EU27	114	110
AT	4	5
BE	7	8
BG	3	2
CY	2	No employer organisation
CZ	2	2
DE	3	7
DK	3	6
EE	1	2
EL	8	2
ES	14	7
FI	5	6
FR	7	12
HR	5	2
HU	5	4
IE	4	2
IT	3	6
LT	4	3

Representativeness of the European social partner organisations: Road transport sector

Member State	Number of trade unions	Number of employer organisations
LU	3	3
LV	1	2
MT	2	3
NL	3	6
PL	4	4
PT	11	4
RO	2	1
SE	3	4
SI	3	4
SK	2	3

Source: Network of Eurofound Correspondents, 2022

Table 12 gives a more detailed view of the number of trade unions and employer organisations in the sector.

Table 12: Number of trade unions/professional associations and employer organisations/business associations in the different parts of the road transport sector

Member State	Trade unions				Employer organisations			
	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Total number	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Total number
EU27	54 47%	47 41%	13 11%	114 100%	28 25%	36 33%	46 42%	110 100%
Number of Member States	26	20	9	27	21	17	24	26
AT	3	1	0	4	1	2	2	5
BE	3	2	2	7	1	5	2	8
BG	1	2	0	3	0	0	2	2
CY	2	0	0	2	No employer organisation	No employer organisation	No employer organisation	No employer organisation
CZ	2	0	0	2	2	0	0	2
DE	1	2	0	3	1	2	4	7
DK	1	2	0	3	3	1	2	6
EE	1	0	0	1	1	0	1	2
EL	1	7	0	8	0	1	1	2
ES	3	11	0	14	1	3	3	7
FI	2	2	1	5	2	2	2	6
FR	6	1	0	7	0	7	5	12
HR	1	2	2	5	2	0	0	2
HU	1	2	2	5	1	1	2	4
IE	3	1	0	4	0	0	2	2
IT	3	0	0	3	1	2	3	6

Member State	Trade unions				Employer organisations			
	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Total number	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Total number
LT	1	1	2	4	2	0	1	3
LU	2	1	0	3	0	2	1	3
LV	1	0	0	1	1	0	1	2
MT	1	1	0	2	1	0	2	3
NL	2	1	0	3	1	2	3	6
PL	1	2	1	4	0	2	2	4
PT	6	3	2	11	1	1	2	4
RO	0	1	1	2	1	0	0	1
SE	2	1	0	3	2	1	1	4
SI	3	0	0	3	3	0	1	4
SK	1	1	0	2	0	2	1	3

Source: Network of Eurofound Correspondents, 2022

Of all 114 sectoral trade unions, 54 (47%) organise workers in both urban public transport activities and the rest of road transport (that is, the whole road transport sector). There are 101 trade unions organising workers in urban public transport in the 27 Member States, 47 of which (47%) organise in only urban public transport, while 54 (54%) organise workers in both urban public transport and the rest of road transport. There are 67 trade unions organising workers in the rest of road transport in the 27 Member States, 13 of which (19%) organise in only the rest of road transport, while 54 (81%) organise in both the rest of road transport and urban public transport.

Of all 110 sectoral employer organisations/business associations, there are 28 (25%) that organise companies in both urban public transport and rest of road transport activities (that is, the whole road transport sector). There are 64 employer organisations organising in urban public transport in 24 of the Member States, 36 of which (56%) organise in only urban public transport, while 28 (44%) organise in both urban public transport and the rest of road transport. In Bulgaria, Cyprus and Ireland, there are no employer organisations in urban public transport activities. There are 74 employer organisations organising in the rest of road transport in 26 of the Member States, 46 of which (62%) organise in only the rest of road transport, while 28 (38%) organise in both the rest of road transport and urban public transport. Cyprus is the only Member State where there is no employer organisation in urban public transport or the rest of road transport.

Next we look at the overlapping organisations, namely those covering both urban public transport and the rest of road transport in their membership domain (Table 13). Such organisations account for almost half (47%) of all of the 114 sectoral trade unions and for a quarter (25%) of all of the 110 sectoral employer organisations. For the trade unions, there is a high degree of overlap among those covering the rest of road transport (81%), while for those organising urban public transport the degree of overlap is 53%. The situation for employer organisations is the opposite and less significant, with a slightly stronger degree of overlap among those organising urban public transport (44%) than among those organising the rest of road transport (38%).

Table 13: Overlap in trade unions and employer organisations

Entire road transport ESSDC	Urban public transport working group	Rest of road transport working group	Detailed analyses	
114 trade unions in 27 Member States	101 trade unions (54/101 = 53% overlap)		47 trade unions covering only urban public transport activities (NACE 49.31, 49.32)	41%
		67 trade unions (54/67 = 81% overlap)	54 trade unions covering both urban public transport and the rest of road transport (whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92))	47%
			13 trade unions covering only the rest of road transport (NACE 49.39, 49.41, 49.92)	11%
110 employer organisations in 26 Member States (not in CY)	64 employer organisations (28/64 = 44% overlap)		36 employer organisations covering only urban public transport (NACE 49.31, 49.32)	33%
		74 employer organisations (28/74 = 38% overlap)	28 employer organisations covering both urban public transport and the rest of road transport (whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92))	25%
			46 employer organisations covering only the rest of road transport (NACE 49.39, 49.41, 49.92)	42%

Source: Network of Eurofound Correspondents, 2022

## 2.1. Coverage, sector-relatedness and organisational density of trade unions

Table 14 describes the organisational density of trade unions in the sector, where data on their membership were available. Overall, membership data were available for the majority (90 out of 114) of the trade unions identified in the sector. In the majority (20) of the Member States, membership data were available for all of the trade unions identified in the national sector. In the remaining seven Member States, membership data were available for some of the trade unions. This includes missing membership data for potentially large sector trade unions in France, Germany and Italy. This means that the current trade union membership figures are underestimated.

Across the EU27, 90 unions in the sector (where membership data were available) had over 750,000 members. Considering this against the total sectoral employment of over 4.9 million employees, this indicates a 15.2% organisational density of trade unions in the sector. In other words, at least 15.2%

of sector workers are unionised across the EU27. Especially high are the rates of unionisation in Denmark, Luxembourg, Austria and Germany (with the latter two both based on estimations) and, to a lesser but still high extent, Greece and Sweden.

Table 14: Organisational density of trade unions in the whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)

Member State	Number of employees (whole road transport sector) <sup>12</sup>	Number (%) of trade unions with available membership data	Number of trade union members in the sector	Density based on available trade union data, %
EU27	4,936,988	90	750,630	15.2
AT	79,082	1 (25)	6,684	70 (estimated)
BE	150,000	4 (57)	30,512	20.3
BG	100,394	3 (100)	6,913	6.9
CY	5,322	2 (100)	1,260	23.7
CZ	169,054	2 (100)	15,125	8.9
DE	826,817	3 (75)	135,500	70 (estimated)
DK	55,343	3 (100)	43,892	79.3
EE	25,700	1 (100)	1,200	4.7
EL	95,002	8 (100)	53,710	56.5
ES	453,670	3 (20)	69,100	15.2
FI	66,663	3 (60)	25,694	38.5
FR	624,955	5 (70)	144,496	23.1
HR	45,200	5 (100)	4,350	9.6
HU	89,534	5 (100)	8,019	9.0
IE	93,203	4 (100)	10,344	11.1
IT	514,386	1 (30)	21,000	4.1
LT	116,963	4 (100)	5,560	4.8
LU	11,842	3 (100)	9,100	76.8
LV	33,265	1 (100)	925	2.8
MT	5,023	2 (100)	894	17.8
NL	181,704	3 (100)	31,350	17.3
PL	618,839	4 (100)	14,504	2.3
PT	116,720	11 (100)	23,670	20.3
RO	233,781	2 (100)	19,057	8.2
SE	127,049	3 (100)	57,515	45.3
SI	34,499	3 (100)	1,956	5.7
SK	62,978	2 (100)	8,300	13.2

Source: Network of Eurofound Correspondents, 2022

<sup>12</sup> See data for employment in the whole road transport sector in Table 2 in Section 1.1.

Table 15 describes the membership strength of the trade unions, their sectoral coverage of different segments of sector activities and their affiliation with the ETF.

Of the 114 trade unions in the sector, 38 do not provide membership data specifically for urban public transport and/or the rest of road transport activities. Therefore, the membership figures reported are likely to be an underestimate. In total, across urban public transport and the rest of road transport (i.e. the whole road transport sector), over 754,000 trade union members are reported, with 356,514 members in the unions organising in urban public transport and 398,216 in the rest of road transport.

Of the 114 trade unions in the sector, 89 organise workers in urban and suburban transport activities (NACE 49.31), 59 organise workers in freight road transport (NACE 49.41) and 57 organise workers in passenger road transport (NACE 49.39) in 27 Member States, while 54 organise workers in taxi operations (NACE 49.32) in 25 Member States (with the exception of Bulgaria and Romania) and 41 organise workers in removal services (NACE 49.92) in 21 Member States (with the exception of Cyprus, Czechia, Hungary, Romania, Slovakia and Slovenia).

Of the 114 trade unions in the sector, 56 are affiliated with the ETF in 23 Member States (with the exception of Croatia, Cyprus, Greece and Portugal) and 58 are not affiliated with the ETF.



## Representativeness of the European social partner organisations: Road transport sector

Table 15: Sector coverage and membership strength of trade unions across the five different segments of the road transport sector in the EU27

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
<b>Total number</b>	<b>114</b>		<b>356,514</b>		<b>398,216</b>		<b>89</b>	<b>54</b>	<b>57</b>	<b>59</b>	<b>41</b>	<b>56</b>
<b>Number of Member States</b>							<b>27</b>	<b>25</b>	<b>27</b>	<b>27</b>	<b>21</b>	<b>23</b>
AT	vida	vida	No data	1	No data	1	Yes	Yes	Yes	Yes	Yes	Yes
AT	younion	younion	No data	2	No members		Yes					Yes
AT	GPF	Union of Postal and Telecommunications Employees	No data	3	No data	2	Yes		Yes			Yes
AT	GPA	Union of Salaried Employees, Journalists and Graphical Workers	No data	4	6,684	3		Yes		Yes	Yes	Yes
BE	ACV-CSC Public Services	ACV-CSC Public Services	5,129	2	No data		Yes	Yes	Yes	Yes	Yes	Yes
BE	ABVV-FGTB BTB-UBT	Belgian Transport Workers Union	4,800	3	35,000	1	Yes		Yes	Yes	Yes	Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
BE	ABVV-FGTB ACOD-CGSP	ABVV-FGTB General Federation for Public Services	No data		No data		Yes	Yes	Yes	Yes	Yes	Yes
BE	ACV-CSC Transcom	ACV-CSC Transcom	3,500		No members		Yes		Yes	Yes	Yes	Yes
BE	ACLVB-CGSLB	General Federation of Liberal Trade Unions of Belgium	10,883	1	No members		Yes	Yes	Yes	Yes	Yes	Yes
BE	ABVV-FGTB BBTk-SETCa	Union of White Collar Workers, Technicians and Staff	No members		No data		Yes			Yes	Yes	
BE	ACV-CSC Puls (rest of road transport)	ACV/CSC Services Publics	No members		11,000	2			Yes	Yes	Yes	Yes
BG	FTTU (whole road transport)	Federation of Transport Trade Unions in Bulgaria	4,393	1	No data		Yes		Yes	Yes	Yes	Yes
BG	FTW Podkrepa (urban public transport)	Federation of Transport Workers – Podkrepa	2,400	2	No members		Yes				Yes	Yes
BG	SJB (urban public transport)	Union of Railway Workers in Bulgaria	120	3	No members		Yes					

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
CY	Segdamelin – PEO (whole road transport)	Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union – Pancyprian Federation of Labour	450	2	60	2	Yes	Yes	Yes	Yes		
CY	FTPAAW – SEK (whole road transport)	Federation of Transport, Petroleum and Agriculture Workers – Cyprus Workers Confederation	500	1	250	1	Yes	Yes	Yes	Yes		
CZ	OS DOSIA (whole road transport)	Trade Union of Transport, Road and Car Repair Services Workers of Bohemia and Moravia	8,125 <sup>13</sup>		No data		Yes	Yes	Yes	Yes		

<sup>13</sup> Membership figures cover the whole road transport sector; a breakdown by urban public transport/the rest of road transport is not available.

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
CZ	OSD (whole road transport)	Trade Union of Transport	7,000 <sup>14</sup>		No data		Yes	Yes	Yes	Yes		Yes
DE	Ver.di	United Services Union	127,000	1	No data	1	Yes	Yes	Yes	Yes	Yes	Yes
DE	EVG	Railway and Transport Union	18,500	3	No members		Yes					Yes
DE	NahVG	Public Transport Union	5,000	2	No members							
DK	3F	The Federation of Danish Workers	7,000	1	37,000	1	Yes	Yes	Yes	Yes	Yes	Yes
DK	DJF	Danish Railway Workers' Union	1,392	2	No members		Yes					Yes
DK	HK Privat	HK Private	500	3	No members		Yes	Yes				Yes
EE	ETTA	Estonian Transport and Road Workers' Trade Union	1,000	1	200	1	Yes		Yes	Yes		Yes
EL	OSME (whole road transport)	Greek Federation of Transport Syndicates	No data	1	No data	1	Yes	Yes	Yes	Yes	Yes	

<sup>14</sup> Membership figures cover the whole road transport sector; a breakdown by urban public transport/the rest of road transport is not available.

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
EL	POS-MET (urban public transport)	Panhellenic Railwaymen Federation	7,460	2	No members		Yes					
EL	Union of Employees and Subsidiary Companies of OASA (urban public transport)	Union of Employees and Subsidiary Companies of OASA	3,300	3	No members		Yes					
EL	Seoasth (urban public transport)	Union of Thessaloniki Urban Transport Organisation Employees	1,300	4	No members		Yes					
EL	Union of OASA Employees (urban public transport)	Union of OASA Employees	110	8	No members		Yes					
EL	SELMA (urban public transport)	Union of Athens Metro Employees	850	5	No members		Yes					

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
EL	Union of STASY Employees (former Union of HSAP Employees) (urban public transport)	Union of STASY Employees	380	6	No members		Yes					
EL	SET (urban public transport)	Union of Tram Employees	310	7	No members		Yes					
ES	UGT-FeSMC	General Union of Workers – Federation of Services, Mobility and Consumption	10,000	2	24,000	1	Yes	Yes	Yes	Yes	Yes	Yes
ES	FSC-CCOO	Federation of Citizenship Services of Workers' Commissions	12,000	1	22,000	2		Yes	Yes	Yes	Yes	Yes
ES	CIG (whole road transport)	Galician Inter-Union Confederation	No data		No data		Yes	Yes	Yes	Yes	Yes	
ES	SIT (urban public transport)	Independent Transport Union of Barcelona	1,100		No members		Yes					

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
ES	SLT (urban public transport)	Free Transport Union	No data		No members		Yes					
ES	ELA (urban public transport)	Solidarity of Basque Countries	No data		No members		Yes					
ES	LAB (urban public transport)	National Workers Commissions	No data		No members		Yes					
ES	USO (urban public transport)	Labour Trade Union	No data		No members		Yes					
ES	CUT-Aragón (urban public transport)	Unitary Collective of Workers of Aragon	No data		No members		Yes					
ES	CSIF (urban public transport)	Independent and Civil Servants' Trade Union Centre	No data		No members		Yes					
ES	Plataforma Sindical – EMT (urban public transport)	Union Platform of the EMT	No data		No members		Yes					
ES	SCMM (urban public transport)	Subway Train Drivers Collective Union	No data		No members		Yes					

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
ES	SU Metro (urban public transport)	Unitary Union – Metro	No data		No members		Yes					
ES	SO Metro (urban public transport)	Subway Worker Solidarity	No data		No members		Yes					
FI	AKT (whole road transport)	Finnish Transport Workers' Union	5,000	1	20,000	1	Yes	Yes	Yes	Yes	Yes	Yes
FI	ERTO (whole road transport)	ERTO	No data		No data			Yes			Yes	Yes
FI	JHL (urban public transport)	The Trade Union for the Public and Welfare Sectors	No data		No members				Yes			Yes
FI	PAM (rest of road transport)	PAM	No members		294				Yes			Yes
FI	RAU (urban public transport)	Union of Locomotive Drivers	400		No members		Yes					
FR	CFTC Transports	General Transport Federation CFTC	No data		3,000		Yes	Yes	Yes	Yes	Yes	Yes
FR	FGTE CFDT	CFDT Transport and Environment	No data	1	50,000	1	Yes	Yes	Yes	Yes	Yes	Yes



## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
FR	FNST CGT	National Federation of Transport Unions CGT	8,996	3	34,500	2	Yes	Yes	Yes	Yes	Yes	Yes
FR	FNTL FO-UNCP	Transport and Logistics Federation FO-UNCP	10,000	2	30,000	3	Yes	Yes	Yes	Yes	Yes	Yes
FR	CFE-CGC Transports	National Federation CFE-CGC Transport	No data		8,000		Yes	Yes	Yes	Yes	Yes	
FR	UNSA Transports	UNSA Transport	No data		No data		Yes	Yes	Yes	Yes	Yes	
FR	UST Transports	Transport Solidarity Union	No data		No members		Yes	Yes	Yes	Yes	Yes	
HR	SHV (whole road transport)	Trade Union of Croatian Drivers	300	2–3	1,100	2–3	Yes	Yes	Yes	Yes	Yes	
HR	SZH-ZET (urban public transport)	Trade Union of Zagreb Holding – ZET	500	1	No members		Yes					
HR	SVPRZZ (urban public transport)	Trade Union of Drivers and Transport Workers – ZET Zagreb	350	2–3	No members		Yes					

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
HR	SPIVH (rest of road transport)	Trade Union of Traffic and Communications of Croatia	No members		1,200	1		Yes		Yes		
HR	USVPRH (rest of road transport)	Association of Croatian Drivers and Transport Staff Unions	No members		900	2-3		Yes		Yes		
HU	KSZOSZ (whole road transport)	National Federation of Transport Trade Unions	450	3	1,100	3	Yes		Yes	Yes		Yes
HU	EKSZ (urban public transport)	Community Transport Union – United Transport Union	1,364	1	No members		Yes					Indirect
HU	Metró KDSZ (urban public transport)	Metro Transport Workers' Union	1,100	2	No members		Yes					
HU	TESZ (rest of road transport)	Trade Union of European Road Transporters	No members		2,005	1-2		Yes		Yes		
HU	KKSZ (rest of road transport)	Road Transport Union	No members		2,000	1-2		Yes		Yes		
IE	NBRU (whole road transport)	National Bus and Rail Union	3,900	1-2	No data		Yes	Yes	Yes	Yes	Yes	

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
IE	TSSA (whole road transport)	Transport Salaried Staffs' Association	782	3	No data		Yes	Yes	Yes	Yes	Yes	Yes
IE	SIPTU (whole road transport)	Services, Industrial, Professional and Technical Union	4,402	1–2	1,110	1	Yes	Yes	Yes	Yes	Yes	Yes
IE	Connect (urban public transport)	Connect	150	4	No members		Yes	Yes	Yes			
IT	FILT-CGIL	Italian Federation of Transport Workers of Italian General Confederation of Labour	No data	1–2	No data	1–2	Yes	Yes	Yes	Yes	Yes	Yes
IT	FIT-CISL	Italian Federation of Transport of Italian Confederation of Workers' Unions	No data	1–2	No data	1–2	Yes	Yes	Yes	Yes	Yes	Yes
IT	UILTrasporti	Italian Labour Union Transport	21,000	3	1,100	3	Yes	Yes	Yes	Yes	Yes	Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
LT	TDF	Transport Workers' Federation	450	2	860	2-3	Yes					Yes
LT	LKADPSF	Federation of Lithuanian Road and Transport Workers Trade Unions	1,450	1	No members		Yes		Yes	Yes		Yes
LT	BTPS 'Solidarumas'	Trade Union 'Solidarumas' of Baltic Transport	No members		2,000	1		Yes	Yes	Yes		Yes
LT	LVPS	Lithuanian Carrier's Trade Union	No members		800	2-3		Yes	Yes	Yes		Yes
LU	Syprolux	Syprolux	1,900	2-3	No members		Yes					Yes
LU	OGB-L Road Transport and Navigation Trade Union	OGB-L Road Transport and Navigation Trade Union	2,200	1-2	2,200	1-2	Yes	Yes	Yes	Yes	Yes	Yes
LU	LCGB-Transport	LCGB-Transport	2,500	1-2	2,500	1-2	Yes	Yes	Yes	Yes	Yes	Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
LV	LAKRS	Latvian Trade Union of Public Service and Transport Workers LAKRS	310	1	615	1	Yes	Yes	Yes	Yes	Yes	Yes
MT	GWU	General Workers Union	200	2	Very small		Yes	Yes	Yes	Yes		Yes
MT	UHM	UHM Voice of the Workers	694	1	No members		Yes					
NL	FNV	Netherlands Trade Union Confederation	12,350	1	More than 7,000	1–2	Yes	Yes	Yes	Yes	Yes	Yes
NL	CNV	Christian National Trade Union Federation	3,000	2	7,000	1–2	Yes	Yes	Yes	Yes	Yes	Yes
NL	De Unie	De Unie	No members		2,000	3		Yes		Yes		
PL	OPZZ (whole road transport)	All-Poland Alliance of Trade Unions	1,400	3	4,300	1	Yes	Yes		Yes	Yes	Yes
PL	KS KM NSZZ 'Solidarność'	National Section of Urban Public Transport in Independent Self-Governing Trade Union 'Solidarity'	6,004	1	No members		Yes					

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?	
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
PL	ZZPKMwRP (urban public transport)	Urban Transportation Workers Trade Union in Republic of Poland	2,800	2	No members		Yes						
PL	KSTD NSZZ 'Solidarność' (rest of road transport)	National Road Transport Section NSZZ 'Solidarność'	No members		1,000	2		Yes	Yes	Yes	Yes	Yes	Yes
PT	Fectrans (whole road transport)	Federation of Transport and Communications Unions	1,500	1	8,000	1	Yes	Yes	Yes	Yes	Yes	Yes	
PT	SITRA (whole road transport)	Transport Workers' Union	1,000	2	3,500	3	Yes	Yes	Yes	Yes	Yes	Yes	
PT	SNMOT (whole road transport)	National Union of Drivers and Other Workers	900	3	4,000	2	Yes	Yes	Yes	Yes	Yes	Yes	
PT	STRUN (whole road transport)	Road and Urban Transport Workers Union of the North	400	6	2,000	4	Yes	Yes	Yes	Yes	Yes	Yes	
PT	Sttamp (whole road transport)	Transport Workers Union of Portugal	300	7	300	5							

## Representativeness of the European social partner organisations: Road transport sector

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							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
PT	SMAQ (urban public transport)	National Union of Train Drivers of Portuguese Railways	600	4	No members		Yes					
PT	ASPTC	Carris Workers' Union Association	500	5	No members		Yes					
PT	SSTM (urban public transport)	Metropolitan Traction Workers' Union	200	8	No members		Yes					
PT	SMTP (urban public transport)	Collective Transport Workers' Union of Porto	170	9	No members		Yes					
PT	SIMM (rest of road transport)	Independent Freight Drivers' Union	No members		200	6		Yes		Yes		
PT	Simmper (rest of road transport)	Independent Union of Drivers of Dangerous Goods	No members		100	7		Yes		Yes		
RO	SLT	Transport Workers Trade Union	No members		1,500	1			Yes	Yes		Yes
RO	ATU-România	'ATU-România' Federation of Transport and Public Services Trade Unions	17,557	1	No members		Yes					Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
SE	Kommunal	Swedish Municipal Workers' Union	17,500	1	8,100	2	Yes	Yes	Yes	Yes	Yes	Yes
SE	Transport	Swedish Transport Workers Union	2,004	3	18,611	1			Yes			Yes
SE	SEKO	Swedish Service and Communications Union	11,300	2	No data				Yes			Yes
SI	ZSSS-SDPZ (whole road transport)	Association of Free Trade Unions of Slovenia – Union of Transportation and Telecommunication Workers	900 <sup>15</sup>	1–2	No data	1–2	Yes	Yes	Yes	Yes		Yes
SI	SV LPP (whole road transport)	LPP Drivers' Trade Union	56 <sup>16</sup>	3	No data	3	Yes	Yes	Yes	Yes		
SI	KS-90 – SVAS (whole road transport)	KS-90 – Slovenian Bus Drivers' Union	1,000 <sup>17</sup>	1–2	No data	1–2	Yes	Yes	Yes	Yes		

<sup>15</sup> Membership figures cover the whole road transport sector; a breakdown by urban public transport/the rest of road transport is not available.

<sup>16</sup> Membership figures cover the whole road transport sector; a breakdown by urban public transport/the rest of road transport is not available.

<sup>17</sup> Membership figures cover the whole road transport sector; a breakdown by urban public transport/the rest of road transport is not available.



Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Full name in English	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the ETF?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
SK	OZ KOVO	Trade Union KOVO	4,000	1	500	1	Yes		Yes			Yes
SK	IOZ (urban public transport)	Integrated Trade Union	3,800	2	No members		Yes					

Source: Network of Eurofound Correspondents, 2022

## 2.2. Involvement of trade unions in collective bargaining

As shown in Table 16, the sectoral trade unions are deeply involved in the sectoral collective bargaining, industrial relations and public policy processes.

Of all of the 114 trade unions in the sector, the majority (104 unions) are considered representative, with at least one representative union in all 27 Member States.

Most trade unions in the sector are deeply involved in social dialogue processes. The majority (109 out of 114 unions) are involved in the sector's collective bargaining processes, at either sectoral or company level or both, in all 27 Member States. Sixty-nine unions are involved in social dialogue activities in the sector in 21 Member States, with 45 unions not involved, most often due to the lack of social dialogue bodies at sectoral level. The majority (103 unions) are consulted by the government on sector-related matters in all 27 Member States.

Among the 114 trade unions in the sector, 54 unions are organising workers across the whole sector (that is, both urban public transport and the rest of road transport), 47 unions are organising workers in urban public transport specifically and 13 unions are organising workers in the rest of road transport specifically. Among the 54 unions organising workers across the whole sector, 46 unions (85%) participate in collective bargaining processes (at either sector or company level). Among the 47 unions organising workers in urban public transport, 38 unions (81%) participate in collective bargaining processes. Among the 13 unions organising workers in the rest of road transport, 11 unions (85%) participate in collective bargaining processes.

A minority of sector unions (10 unions) are not considered representative in the sector's context, and these are found in four Member States (France, Portugal, Romania and Spain):

- France: UST Transports (urban public transport)
- Portugal: ASPTC (urban public transport)
- Romania: SLT (rest of road transport)
- Spain: USO (urban public transport)
- Spain: CUT-Aragón (urban public transport)
- Spain: CSIF (urban public transport)
- Spain: Plataforma Sindical – EMT (urban public transport)
- Spain: SCMM (urban public transport)
- Spain: SU Metro (urban public transport)
- Spain: SO Metro (urban public transport)

Of these 10 non-representative unions, most (nine unions) organise workers in urban public transport (in France, Portugal and Spain) and one union in Romania organises workers in the rest of road transport.

Of the 10 non-representative unions, eight are involved in collective bargaining processes, mostly at company level in the sector. None of these unions is involved in social dialogue activities, but seven are consulted by the government on sector-related matters.

A minority (five unions) of all of the 114 trade unions in the sector do not participate in collective bargaining processes in the sector in their countries:

- Malta: GWU (whole road transport sector)
- Poland: OPZZ (whole road transport sector)
- Poland: ZZPKMwRP (urban public transport)
- Portugal: Simmper (rest of road transport)
- Romania: SLT (rest of road transport)

In all of the countries where there is a union not participating in collective bargaining processes, there are collective bargaining processes in the sector, at sectoral and/or company level. In those countries, other trade unions participate in collective bargaining processes. Two of the unions not participating in collective bargaining processes are members of the ETF, namely GWU (Malta, whole road transport sector) and SLT (Romania, rest of road transport).

Table 16: Involvement of trade unions in collective bargaining, social dialogue and public policy in the EU27

Member State	Trade unions	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Recognised as representative at national level	Involved in social dialogue activities	Consulted by the government on sector-related matters	Involved in collective bargaining in the sector (either sectoral or company level)	ETF members	Affiliation with other European associations
<b>Total number</b>	<b>114</b>	<b>54</b>	<b>47</b>	<b>13</b>	<b>104</b>	<b>69</b>	<b>103</b>	<b>109</b>	<b>56</b>	<b>4</b>
<b>Number of Member States</b>	<b>27</b>	<b>26</b>	<b>20</b>	<b>9</b>	<b>27</b>	<b>21</b>	<b>27</b>	<b>27</b>	<b>23</b>	<b>4</b>
AT	4	3	1	0	4	2	4	4	4	0
BE	7	3	2	2	7	7	7	7	6	0
BG	3	1	2	0	3	2	3	3	2	0
CY	2	2	0	0	2	0	2	2	0	0
CZ	2	2	0	0	2	0	2	2	1	0
DE	3	1	2	0	3	0	3	3	2	1
DK	3	1	2	0	3	3	3	3	3	0
EE	1	1	0	0	1	1	1	1	1	0
EL	8	1	7	0	8	1	8	8	0	0
ES	14	3	11	0	7	7	14	14 <sup>18</sup>	2	0
FI	5	2	2	1	5	4	4	5	4	0
FR	7	6	1	0	6	5	5	7 <sup>19</sup>	4	0
HR	5	1	2	2	5	5	5	5	0	1
HU	5	1	2	2	5	4	4	5	2	0
IE	4	3	1	0	4	3	2	4	2	1
IT	3	3	0	0	3	1	3	3	3	0
LT	4	1	1	2	4	2	4	4	4	0
LU	3	2	1	0	3	3	3	3	3	0

<sup>18</sup> In Spain, seven trade unions in urban public transport are not considered representative but do participate in collective bargaining processes at company level.

<sup>19</sup> In France, one trade union in urban public transport is not considered representative but does participate in collective bargaining processes at company level.

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade unions	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Recognised as representative at national level	Involved in social dialogue activities	Consulted by the government on sector-related matters	Involved in collective bargaining in the sector (either sectoral or company level)	ETF members	Affiliation with other European associations
LV	1	1	0	0	1	1	1	1	1	0
MT	2	1	1	0	2	1	1	1 <sup>20</sup>	1	0
NL	3	2	0	1	3	3	3	3	2	0
PL	4	1	2	1	4	4	3	2 <sup>21</sup>	2	0
PT	11	5	4	2	10	6	10	10	0	1
RO	2	0	1	1	1	0	1	1	2	0
SE	3	2	1	0	3	3	3	3	3	0
SI	3	3	0	0	3	0	2	3	1	0
SK	2	1	1	0	2	1	2	2	1	0

Source: Network of Eurofound Correspondents, 2022

Details of the representativeness status of all sectoral trade unions, of their involvement in collective bargaining, social dialogue and industrial action, and on whether they are consulted by the government on sector-related matters can be found in Annex 4.

<sup>20</sup> One trade union in Malta is considered representative but does not participate in collective bargaining processes in the sector.

<sup>21</sup> In Poland, two trade unions are considered representative but do not participate in collective bargaining processes in the sector.

### 2.3. Coverage, sector-relatedness and organisational density of employer organisations

Table 17 describes the organisational density of employer organisations/business associations in the sector, where data on their membership were available. Overall, membership data were available for the majority (91 out of 110) of the employer organisations/business associations identified in the sector. In the majority (18) of the Member States, membership data were available for all employer organisations/business associations identified in the sector. In the remaining nine Member States, membership data were available for some of the employer organisations/business associations, except Cyprus, which has no employer organisation. This includes missing membership data for potentially large sector employer organisations/business associations in Belgium, Denmark, Italy and Spain. This means that the current membership figures for employer organisations/business associations are underestimated.

Across the EU27, 91 employer organisations/business associations in the whole road transport sector (where membership data were available) had almost 300,000 members (counting both individual member companies and in some cases the associations or branches as members). Considering this against the number companies identified in the sector (over 1,300,000), this gives an organisational density of employer organisations/business associations in the sector of 20.8%. In other words, the employer organisations/business associations organise at least 20.8% of companies in the whole road transport sector across the EU27. Especially high are the rates of company organisation through employer organisations/business associations in Austria, Germany, Hungary, Netherlands, Poland, Romania and Spain.

Table 17: Organisational density of employer organisations/business associations in the whole road transport sector

Member State	Number of companies in the whole road transport sector	Number (%) of employer organisations/business associations with available membership data	Number of members in the sector	Density based on available data, %
EU27	1,384,959	91	288,041	20.8
AT	17,656	6 (100)	17,607	Very high
BE	13,934	7 (88)	6,598	47.4
BG	12,927	2 (100)	1,266	9.8
CY	65,491	No employer organisation		0.0
CZ	16,413	2 (100)	2,067	12.6
DE	33,719	7 (100)	25,178	74.7
DK	34,668	5 (83)	4,850	14.0
EE	42,291	2 (100)	303	0.7
EL	34,522	2 (100)	144	0.4
ES	17,705	6 (86)	156,139	Very high
FI	17,898	6 (100)	5,111	28.6
FR	163,849	6 (100)	5,278	3.2
HR	34,713	1 (50)	90	0.3

Member State	Number of companies in the whole road transport sector	Number (%) of employer organisations/business associations with available membership data	Number of members in the sector	Density based on available data, %
HU	7,356	4 (100)	8,699	Very high
IE	17,387	2 (100)	1,240	7.1
IT	32,867	3 (50)	2,679	8.2
LT	7,058	3 (100)	766	10.9
LU	6,680	3 (100)	253	3.8
LV	1,668	2 (100)	419	25.1
MT	14,605	3 (100)	26	0.2
NL	10,787	3 (100)	15,199	140.9
PL	48,506	4 (100)	5,400	Very high
PT	116,976	3 (75)	4,728	4.0
RO	19,205	1 (100)	16,000	83.3
SE	17,821	4 (100)	6,926	38.9
SI	33,844	3 (75)	3,875	11.4
SK	6,256	2 (75)	17	0.3

Source: Network of Eurofound Correspondents, 2022

Table 18 describes the membership of the employer organisations/business associations in the sector and their sectoral coverage of the different segments of the sector.

Of the 110 employer organisations/business associations in the whole road transport sector, the majority have membership data reported (92 organisations). However, membership data are missing for large employer organisations/business associations in Italy and Spain. Therefore, the membership figures reported are likely to be an underestimate. In total, in the whole road transport sector, around 300,000 members of employer organisations/business associations are reported, with around 62,000 in urban public transport and 238,000 in the rest of road transport.

Of the 110 employer organisations/business associations in the sector, 49 organise workers in urban and suburban transport (NACE 49.31) in 24 Member States, 66 organise workers in freight road transport (NACE 49.41) in 26 Member States (with the exception of Cyprus, which has no employer organisation in the sector), 54 organise workers in passenger road transport (NACE 49.39) in 26 Member States (with the exception of Cyprus), 45 organise workers in taxi operations (NACE 49.32) in 24 Member States (with the exception of Cyprus, Latvia and Lithuania) and 35 organise workers in removal services (NACE 49.92) in 20 Member States (with the exception of Austria, Cyprus, Greece, Ireland, Lithuania, Portugal and Romania).

Of the 110 employer organisations/business associations in the sector, 51 organisations are affiliated with the IRU and 17 organisations are affiliated with the UITP.

Table 18: Sector coverage of employer organisations/business associations across the five different segments of the road transport sector in the EU27

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
<b>Total number</b>	<b>110</b>		<b>62,768</b>		<b>238,065</b>		<b>49</b>	<b>45</b>	<b>54</b>	<b>66</b>	<b>35</b>	<b>51</b>	<b>17</b>
<b>Number of Member States</b>							<b>24</b>	<b>24</b>	<b>26</b>	<b>26</b>	<b>20</b>	<b>26</b>	<b>12</b>
AT	FVALS (whole road transport)	Federal Association of Bus, Civil Aviation and Shipping Companies	240	2	1,020	2	Yes	Yes	Yes	Yes		Yes	
AT	FVGB (rest of road transport)	Federal Association of the Freight Operation Trades	No members		9,306	1				Yes		Yes	
AT	FVS (rest of road transport)	Federal Association of Cableway Operators	No members		603	3	Yes			Yes			
AT	FVSB (urban public transport)	Federal Association of Rail Transport	20	3	No members		Yes						Yes
AT	FVBG (urban public transport)	Federal Association of Transport with Passenger Cars	6,418	1	No members			Yes	Yes			Yes	
BE	FBAA	Federation of Belgian Bus and Autocar Entrepreneurs	88		235		Yes	Yes	Yes	Yes		Yes	Yes
BE	BKV-CBD	Belgian Chamber of Movers	No members		98						Yes		
BE	Febetra	The Federation of Belgian Transporters and Logistics Service Providers	No members		1,800	2		Yes	Yes	Yes		Yes	
BE	TLV	Transport and Logistics Flanders	No members		1,400	3				Yes	Yes		



## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
BE	UPTR	Union of Professional Hauliers and Logistics Operators	No members		2,500	1				Yes	Yes		
BE	WF-FE	Employers' Federation for International Trade, Transport and Logistics	No members		518				Yes	Yes	Yes		
BE	BVGSSV	Belgian Federation for the Communal Urban and Regional Transport	3		No members		Yes		Yes				Yes
BE	GTL TAXI	National Grouping of Enterprises with Taxi- and Location Vehicles with Drivers	No data		No members			Yes				Yes	
BG	Aebtri	Association of the Bulgarian Enterprises for International Transport and the Roads	No data		870	1	Yes		Yes	Yes		Yes	
BG	CBRH	Chamber of the Bulgarian Road Hauliers	No members		396	2	Yes	Yes	Yes	Yes	Yes	Yes	
CZ	Česmad Bohemia	Association of Car Carriers	8	1	2,026	1	Yes	Yes	Yes	Yes	Yes	Yes	
CZ	SD ČR	Transport Union of the Czech Republic	2	2	31	2	Yes	Yes	Yes	Yes	Yes		
DE	BDO	Federal Association of German Bus Companies	No data		No data		Yes		Yes			Yes	
DE	DSLVL	Federal Association for Freight Forwarding and Logistics Germany	No members		No data					Yes	Yes	Yes	
DE	BGL	Federal Road Haulage Association Logistics and Waste Management	No members		7,000	1				Yes	Yes	Yes	
DE	VKA	Association of Municipal Employers' Associations	212	3	No data		Yes		Yes				

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
DE	AVN	Employer Organisation for Urban Public Transport	71		No members		Yes		Yes				
DE	BVTM	Federal Association of Taxis and Rented Cars	12,000	1	No members			Yes				Yes	
DE	VDV	Association of German Transport Companies	295	2	No members		Yes		Yes				Yes
DK	DPT (whole road transport)	Danish Passenger Transport	1,700		140		Yes		Yes			Yes	Yes
DK	DI (whole road transport)	Confederation of Danish Industry	76		549				Yes	Yes	Yes	Yes	Yes
DK	DE (whole road transport)	Danish Chamber of Commerce	No data		No data								
DK	KL (urban public transport)	Local Government Denmark	3		No members				Yes	Yes	Yes		
DK	ITD (rest of road transport)	International Transport Denmark	No members		700				Yes	Yes	Yes	Yes	
DK	DTL (rest of road transport)	Danish Transport and Logistics Organisation	No members		1,422			Yes		Yes	Yes	Yes	
EE	AEL	Union of Estonian Automobile Enterprises	12	1	41	2	Yes	Yes	Yes	Yes	Yes		
EE	ERAA	Association of Estonian International Road Carriers	No data		250	1				Yes		Yes	
EL	Poeiata	Panhellenic Federation of Professional Taxi Owners	120	1	No members			Yes				Yes	
EL	OFAE	Hellenic Federation of Road Transports	No data		22	1			Yes	Yes		Yes	

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
ES	Confibus (whole road transport)	Spanish Confederation of Bus Transport	1,000	1	95,000	1	Yes	Yes	Yes	Yes	Yes	Yes	
ES	ASTIC (rest of road transport)	Association of International Road Transport	No data		196 direct members, around 7,000 companies through province level association		Yes	Yes	Yes	Yes	Yes	Yes	
ES	ATUC (urban public transport)	Association of Urban and Metropolitan Public Transport	86	2	No members		Yes	Yes	Yes	Yes	Yes		Yes
ES	Antaxi (urban public transport)	National Taxi Association	53	3	No members					Yes			
ES	Anetra (urban public transport)	National Coach Transport Association	No data		No members					Yes		Yes	
ES	CETM (rest of road transport)	Spanish Confederation of Freight Transport	No members		31,000	2	Yes			Yes		Yes	
ES	Fenadiser (rest of road transport)	National Federation of Transport Associations of Spain	No members		22,000	3		Yes					

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
FI	ALT (road transport whole)	Employers' Federation of Road Transport	130	1	672	2			Yes	Yes		Until 2023 <sup>22</sup>	Yes
FI	PALTA (whole road transport)	Service Sector Employers	No data	2	15				Yes				
FI	Taksiliikenteen Työnantajat ry (urban public transport)	Taxi Sector's Employers	36		No members		Yes		Yes				
FI	KT (urban public transport)	Local Government and County Employers	2		No members				Yes	Yes	Yes		
FI	LAL (rest of road transport)	The Finnish Bus and Coach Association	No data		156			Yes					
FI	SKAL (rest of road transport)	Finnish Transport and Logistics	No members		4,100	1	Yes	Yes	Yes	Yes	Yes	Yes	
FR	UTP (urban public transport)	Union of Public and Rail Transport	170		No members					Yes	Yes		Yes
FR	UNIT (urban public transport)	National Union of Taxi industries	164		No members					Yes		Yes	
FR	CSNERT (urban public transport)	National Chamber of Delivery and Touring Car Companies	No data		No members					Yes			

<sup>22</sup> ALT used to be a member of both the IRU and the UITP; however, its membership of the IRU ended at the end of 2023. Therefore, as of 2024, ALT is affiliated only with the UITP.

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
FR	FNTI (urban public transport)	National Federation of Independent Taxis	No data		No members		Yes			Yes			
FR	FNAT (urban public transport)	National Federation of Taxi Professionals	No data		No members		Yes		Yes	Yes			
FR	FNDT (urban public transport)	National Taxi Federation	No data		No members		Yes		Yes				
FR	UNT (urban public transport)	National Taxi Union	No data		No members			Yes					
FR	FNTR (rest of road transport)	National Road Transport Federation	No members		5,300			Yes				Yes	
FR	Union TLF (rest of road transport)	French Union of Transport and Logistics Companies	No members		No data			Yes					
FR	OTRE (rest of road transport)	Organisation of European Road Hauliers	No members		1,927	2		Yes					Yes
FR	FNTV (rest of road transport)	National Federation of Passenger Transport	No data		5,291	1		Yes				Yes	
FR	AFTRI (rest of road transport)	French Road Haulage Association for International Transport	No members		150			Yes				Yes	
HR	HUP-UP	Croatian Employer's Association – Transport Association	70% <sup>23</sup>	1	50%	1	Yes	Yes	Yes	Yes	Yes		

<sup>23</sup> In this cell, the percentage refers not to number of members, but to a proportion of the workforce covered by this organisation.

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
HR	HGK	Croatian Chamber of Commerce	No data	No data	No data		Yes	Yes	Yes	Yes	Yes	Yes	
HU	MKFE (road transport whole)	Hungarian Road Transporter Association	127	1	2,500	2	Yes	Yes	Yes	Yes	Yes	Yes	
HU	OTSZ (urban public transport)	National Taxi Association	100	2	No members					Yes			
HU	N.i.T. (rest of road transport)	Federation of National Private Transporters	No members		4,762	1				Yes			
HU	Fuvosz (rest of road transport)	National Association of Transporter Contractors	No members		1,210	3		Yes					
IE	IRHA	Irish Road Haulage Association	No members		1,000	1			Yes	Yes		Yes	
IE	FTAI	Freight Transport Association Ireland	No members		240	2				Yes			
IT	ANAV (whole road transport)	National Road Passenger Transport Association	600	1	2,000	1	Yes	Yes	Yes	Yes	Yes	Yes	Yes
IT	Asstra (urban public transport)	Transport Association	153	2	No members					Yes			Yes
IT	AGENS (urban public transport)	Confederal Agency of Transport and Services	No data		No members					Yes			
IT	Fiapauto-transporti (rest of road transport)	Italian Federation of Professional Hauliers	No members		No data					Yes		Yes	
IT	Confetra (rest of road transport)	Italian General Confederation of Transport and Logistics	No members		No data					Yes		Yes	

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
IT	ANITA	National Association of Automobile Transport Companies	No members	No members	1,900					Yes			
LT	Linava	Lithuanian National Road Carriers' Association	27	1	27	1			Yes	Yes		Yes	
LT	LKVA	Lithuanian Passenger Transport Association	21	2	21	2			Yes				
LT	TTLA	International Transport and Logistics Alliance	No members		No members				Yes	Yes			
LU	FLEAA (urban public transport)	Luxembourg Federation of Bus and Coach Operators	25	2	No members		Yes	Yes	Yes	Yes	Yes	Yes	
LU	Federation of Taxis, Cars and Ambulances (urban public transport)	Federation of Taxis, Cars and Ambulances	50	1	No members		Yes		Yes				
LU	GT (rest of road transport)	Association of Transport Operators	No members		170	1		Yes				Yes	
LV	LPPA	Latvian Passenger Carriers Association	8	1	16	2	Yes		Yes	Yes	Yes		
LV	Latvijas auto	Association 'Latvijas Auto'	No data		395	1						Yes	
MT	MEA	Malta Employers Association	No data	1	No data		Yes	Yes	Yes	Yes	Yes		
MT	Malta Chamber of SMEs	Malta Chamber of Small and Medium-sized Enterprises	No members		40% of companies	1							
MT	ATTO	Association of Tractor and Trailer Operators	13		6					Yes		Yes	

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
NL	KNV (whole road transport)	Royal Dutch Transport	168	1	148		Yes	Yes	Yes	Yes	Yes	Yes	Yes
NL	VVOV (urban public transport)	Association of Public Transport Employers	6		No members								
NL	VSV (urban public transport)	Association of Urban Transport Companies	7		No members		Yes	Yes	Yes	Yes			Yes
NL	TLN (rest of road transport)	Transport and Logistics Netherlands	No data		4,700	2	Yes			Yes		Yes	
NL	VVT	Vertical Transport Association	No members	No members	170					Yes			
NL	Evofenedex (rest of road transport)	Evofenedex	No members		10,000	1	Yes					Yes	
PL	Pracodawcy RP	Employers of Poland	26	2	No members		Yes	Yes		Yes	Yes		
PL	FOT	Public Transport Organisers Forum	No members		2,400	1	Yes		Yes				
PL	IGMK	Chamber of Commerce of Public Transport	157	1	No members		Yes						Yes
PL	ZMPD	Association of International Road Carriers in Poland	No data		2,817				Yes	Yes	Yes	Yes	
PT	Antrop (whole road transport)	National Association of Passenger Transport	12	2	69		Yes		Yes			Yes	Yes
PT	Antral (urban public transport)	National Association of Road Transporters in Light Motor Vehicles	3,000	1	No members					Yes			
PT	Antram (rest of road transport)	National Association of Public Road Freight Transport	No members		1,647	1–2		Yes		Yes		Yes	



Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
PT	ANTP (rest of road transport)	National Association of Portuguese Carriers	No members		No data	1–2				Yes			
RO	UNTRR	National Union of Road Hauliers from Romania	Over 16,000 (whole road transport)						Yes	Yes		Yes	
SE	SBF (whole road transport)	Swedish Bus and Coach Federation	259		10		Yes	Yes	Yes		Yes	Yes	Yes
SE	BA (whole road transport)	Swedish Transport Employers' Association	No data	1–2	No data	1–2	Yes	Yes	Yes			Yes	
SE	Almega Tåg företagen (urban public transport)	Swedish National Coach Association	70		No members				Yes				
SE	STBF (rest of road transport)	Swedish Tourist Bus Association	No members		70	2							
SI	GZS-ZPZ	Chamber of Commerce and Industry of Slovenia – Transport Association	35		410	2	Yes	Yes	Yes	Yes	Yes		
SI	OZS	Chamber of Craft and Small Business of Slovenia – Transport Section	1,000	1	2,420	1		Yes	Yes	Yes			
SI	ZDS	Slovenian Employers' Association – Section for Transport and Communications	No data		No data		Yes	Yes					
SI	GIZ Intertransport	GIZ Intertransport	No data		No data				Yes	Yes	Yes	Yes	

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Full name in English	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Coverage in the following segments?					Affiliated with the IRU?	Affiliated with the UITP?
							Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
SK	UDPaT (urban public transport)	Union of Transportation, Posts and Telecommunications	1	2	No members		Yes	Yes	Yes	Yes	Yes		
SK	ZAD (urban public transport)	Association of Bus Transportation	16	1	No members		Yes	Yes					
SK	Česmad Slovakia (rest road transport)	Česmad Slovakia – Association of Road Transport Operators in the Slovak Republic	727	No data	727	1		Yes				Yes	

Source: Network of Eurofound Correspondents, 2022

## 2.4. Involvement of employer organisations in collective bargaining

As shown in Table 19, the sectoral employer organisations/business associations are deeply involved in the sectoral collective bargaining, industrial relations and public policy processes.

Of the 110 employer organisations/business associations in the sector, 80 (73%) are considered representative, and these are found in 26 Member States (excluding Cyprus, where there is no employer organisation). Seventy-seven employer organisations/business associations in 26 Member States (except for Cyprus) are involved in social dialogue activities in the sector, with 33 not involved, most often due to the lack of social dialogue bodies at sectoral level. The majority (96) of the employer organisations/business associations in the sector are consulted by the government on sector-related matters. Of the 110 employer organisations/business associations in the sector, 83 are involved in the sector's collective bargaining processes, at either sectoral or company level or both, in 26 Member States.

Fifty-one employer organisations/business associations are affiliated with the IRU in 26 Member States, 17 are affiliated with the UITP in 12 Member States and 10 are associated with other European-level organisations.

Among the 110 employer organisations/business associations in the sector, 28 are organising companies across the whole sector (both urban public transport and the rest of road transport), 36 are organising companies in urban public transport specifically (NACE 49.31 and 49.32) and 46 are organising companies in the rest of road transport specifically (NACE 49.39, 49.41 and 49.92). Among the 28 employer organisations/business associations organising companies across the whole sector, 21 (75%) participate in collective bargaining processes (at either sector or company level). Among the 36 employer organisations/business associations organising in urban public transport specifically, 32 (89%) participate in collective bargaining processes. Among the 46 employer organisations/business associations organising in the rest of road transport specifically, 25 (54%) participate in collective bargaining processes.

Of all of the sectoral employer organisations, 30 (27%) are not considered to be representative in 14 Member States (France, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Slovakia, Slovenia and Sweden). In each of these Member States, at least one other employer organisation/business association is considered representative.

The 30 non-representative employer organisations/business associations (that is, those that are not recognised as representative by either mutual recognition or legal criteria in their national context) are of different types, and the majority of them have a role in the sectoral social dialogue landscape. Of these, 28 are consulted by the government on sector-related matters, 24 are involved in social dialogue processes in the sector and 24 are involved in collective bargaining processes in the sector (at either sector or company level). One non-representative employer organisation/business association is affiliated with the IRU.

Twenty-seven employer organisations/business associations are not involved in collective bargaining processes in the sector, and these are found in 12 Member States. Most of them play a role in the social dialogue landscape in the sector. Of these, 16 are involved in social dialogue processes in the sector and 22 are consulted by the government on sector-related matters. Among the 12 Member States with an employer organisation/business association not involved in collective bargaining processes, in two countries (Malta and Poland) collective bargaining occurs mostly at company level

and there are no sectoral-level collective bargaining processes. In the other 10 countries, there are sectoral collective bargaining processes (Czechia, Denmark, Estonia, Finland, France, Germany, the Netherlands, Portugal, Slovakia and Sweden), as shown in Table 20.

## Representativeness of the European social partner organisations: Road transport sector

Table 19: Involvement of employer organisations/business associations in collective bargaining, social dialogue and public policy in the EU27

Member State	Employer organisation/business association	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Recognised as representative at national level	Involved in social dialogue activities	Consulted by the government on sector-related matters	Involved in collective bargaining in the sector (either sectoral or company level)	IRU members	UITP members	Affiliation with other European associations
<b>Total number</b>	<b>110</b>	<b>28</b>	<b>36</b>	<b>46</b>	<b>80</b>	<b>77</b>	<b>96</b>	<b>83</b>	<b>51</b>	<b>17</b>	<b>10</b>
<b>Number of Member States</b>	<b>26</b>	<b>21</b>	<b>17</b>	<b>24</b>	<b>26</b>	<b>26</b>	<b>26</b>	<b>26</b>	<b>26</b>	<b>12</b>	<b>7</b>
AT	5	1	2	2	5	4	5	5	3	1	2
BE	8	1	5	2	8	5	7	8	3	2	3
BG	2	0	0	2	2	2	1	2	2	0	0
CY	No employer organisation										
CZ	2	2	0	0	2	1	1	1	1	0	0
DE	7	1	2	4	7	3	5	5	4	1	0
DK	6	3	1	2	6	5	6	3	4	2	0
EE	2	1	0	1	2	1	1	1	1	0	0
EL	2	0	1	1	2	1	2	2	2	0	0
ES	8	1	3	3	7	4	7	3	4	1	1
FI	6	2	2	2	6	3	5	3	2	1	0
FR	12	0	7	5	8	6	10	9	4	2	0
HR	2	2	0	0	2	2	2	2	1	0	0
HU	4	1	1	2	2	3	4	4	1	0	1
IE	2	0	0	2	1	2	2	2	1	0	0
IT	6	1	2	3	2	6	6	6	4	2	0
LT	3	2	0	1	2	3	3	3	1	0	1
LU	3	0	2	1	1	3	2	3	2	1	0
LV	2	1	0	1	1	2	1	1	1	0	0
MT	3	1	0	2	1	2	2	1	1	0	0

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Recognised as representative at national level	Involved in social dialogue activities	Consulted by the government on sector-related matters	Involved in collective bargaining in the sector (either sectoral or company level)	IRU members	UITP members	Affiliation with other European associations
NL	6	1	2	3	3	3	6	4	3	2	1
PL	4	0	2	2	3	3	4	3	1	1	0
PT	4	1	1	2	2	2	4	3	1	1	0
RO	1	1	0	0	1	1	1	1	1	0	0
SE	4	2	1	1	1	3	2	2	2	1	1
SI	4	3	0	1	3	4	4	4	1	0	0
SK	3	0	2	1	1	3	3	2	1	0	0

Source: Network of Eurofound Correspondents, 2022

Details of the representativeness status of all employer organisations, of their involvement in collective bargaining, social dialogue and industrial action, and on whether they are consulted by the government on sector-related matters can be found in Annex 5. Annex 3 lists the national employer organisations and business associations that were identified in the scope of this study.

## 2.5. Collective bargaining patterns and social dialogue practices in the road transport sector in the Member States

The key aspects of the collective bargaining and social dialogue practices in the sector across the individual Member States are summarised in Tables 20–22.

Overall, the coverage of collective bargaining in the sector in the countries with available data is high. It is especially high in urban public transport activities, where it ranges from 40% in Malta to 100% in Austria, Finland, France, Luxembourg, Slovakia, Slovenia and Spain. In urban public transport, the average coverage is around 70%. In the rest of road transport, the average coverage is somewhat lower, at around 50%, and ranges from 0% in Bulgaria and Malta to 100% in Austria, Finland, France, Luxembourg, Slovenia and Spain.

The only two countries with no collective bargaining in a part of the sector are Bulgaria and Malta, where no collective bargaining exists in the rest of road transport. In all of the other Member States, there is a form of collective bargaining in either urban public transport or the rest of road transport, or both.

Table 20: Collective bargaining patterns in the sector in the EU27

Member State	Collective bargaining coverage, %		Collective bargaining type (company, sector, both or none)	
	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)
AT	100	100	Both	Both
BE	96	96	Both	Both
BG	55	0	Company	No collective bargaining
CY	93	12	Company	Company
CZ	80	55	Both	Both
DE	90	24	Both	Both
DK	75	85	Both	Sector
EE	66	20	Both	Sector
EL	No data	No data	Company	Both
ES	100	100	Both	Sector
FI	100	100	Sector	Sector
FR	100	100	Sector	Sector
HR	60	70	Company	Company
HU	80	25	Company	Company
IE	90	10	Company	Company
IT	95	95	Both	Both
LT	45	10	Company	Company
LU	100	100	Sector	Sector
LV	50	No data	Company	Company
MT	40	0	Company	No collective bargaining
NL	80	95	Both	Both
PL	No data	No data	Company	Company

Member State	Collective bargaining coverage, %		Collective bargaining type (company, sector, both or none)	
	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)
PT	70	72	Both	Both
RO	No data	5	Company	Company
SE	95	90	Sector	Sector
SI	100	100	Both	Sector
SK	100	No data	Both	Both

Source: Network of Eurofound Correspondents, 2022.

The type of collective bargaining prevailing – sectoral, company or both – is also summarised in Table 21 for urban public transport and the rest of road transport. The data indicate that, in urban public transport, company-level bargaining is more important (in part due to the large size of the main urban public transport companies; see Table 22). In contrast, in the rest of road transport, sector-level bargaining plays a more prominent role (in part due to the smaller size of the largest companies in this segment; see Table 22).

In urban public transport activities, in 12 Member States there is both sectoral and company-level collective bargaining and, in 11 Member States, there is collective bargaining at company level only. In only four Member States is there collective bargaining at sectoral level only. In this segment of the sector, company-level bargaining plays a significant role.

In the rest of road transport, sectoral-level collective bargaining is most important, taking place in eight Member States. In nine Member States, collective bargaining takes place at both sectoral and company level and, in another eight Member States, it takes place at company level only.

Table 21: Main type of collective bargaining in the sector by Member State

Type of collective bargaining	Urban public transport activities (NACE 49.31, 49.32)		Rest of road transport (NACE 49.39, 49.41, 49.92)	
	Number of Member States	Member States	Number of Member States	Member States
None	0		2	BG, MT
Sectoral level	4	FI, FR, LU, SE	8	DK, EE, ES, FI, FR, LU, SE, SI
Company level	11	BG, CY, EL, HR, HU, IE, LT, LV, MT, PL, RO	8	CY, HR, HU, IE, LT, LV, PL, RO
Both company and sectoral level	12	AT, BE, CZ, DE, DK, EE, ES, IT, NL, PT, SI, SK	9	AT, BE, CZ, DE, EL, IT, NL, PT, SK

Source: Network of Eurofound Correspondents, 2022

Table 22 illustrates the differences between urban public transport and the rest of road transport in terms of the company size of the three largest companies in each of the Member States. This influences the prevailing collective bargaining type, as explained above.



In urban public transport, in many countries data are not available. Where data are available, the workforce of the three largest companies makes up a significant proportion of the entire urban public transport workforce. This proportion ranges from 19% in Germany to 63% in Slovakia. In the majority (17) of the Member States, all three of the largest companies undertake company-level collective bargaining.

In the rest of road transport, where data are available, the workforce of the three largest companies constitutes a much smaller proportion of the entire workforce in this segment compared with urban public transport. This ranges from 3% in Cyprus, Czechia and Romania to 21% in Hungary. In nine Member States, all three of the largest companies undertake company-level collective bargaining.

**Table 22: Workforce of the three largest companies in urban public transport and the rest of road transport in the EU27**

Member State	Urban public transport activities (NACE 49.31, 49.32)				Rest of road transport activities (NACE 49.39, 49.41, 49.92)			
	Total workforce	Workforce of the three largest companies	Proportion of workforce covered by the three largest companies, %	Collective bargaining at company level?	Total workforce	Workforce of the three largest companies	Proportion of workforce covered by the three largest companies, %	Collective bargaining at company level?
AT	No data	14,100	No data	All 3	No data	6,600	No data	All 3
BE	No data	25,500	No data	All 3	150,000	5,400	4	All 3
BG	16,478	5,950	36	All 3	70,221	4,532	6	0
CY	No data	1,030	No data	All 3	8,000	250	3	All 3
CZ	41,805	15,642	37	All 3	127,743	4,100	3	All 3
DE	150,000	28,800	19	All 3	688,800	34,800	5	1
DK	17,102	3,973	23	All 3	38,540	2,896	8	1
EE	3,000	1,549	52	1	22,700	3,479	15	No data
EL	No data	8,701	No data	All 3	No data	No data	No data	No data
ES	No data	25,101	No data	All 3	400,507	18,597	5	1
FI	5,000	2,300	46	0 (CB at sector level)	35,000	5,400	15	0 (CB at sector level)
FR	49,300	No precise data	No data	All 3	529,000	No precise data	No data	All 3
HR	No data	4,640	No data	All 3	8,900	No data	No data	All 3
HU	22,714	11,680	51	All 3	120,000	25,416	21	2
IE	No data	10,333	No data	All 3	100,900	6,182	6	2
IT	No data	103,000	No data	0 (CB at sector level)	No data	10,000	No data	0 (CB at sector level)
LT	No data	3,820	No data	All 3	99,765	7,600	8	1
LV	13,130	4,650	35	2	25,765	3,210	12	2
LU	No data	2,491	No data	0 (CB at sector level)	No data	1,048	No data	0 (CB at sector level)
MT	No data	1,300	No data	No data	3,200	No data	No data	No data
NL	60,000	16,500	28	1 (CB at sector level)	150,000	9,000	6	All 3
PL	No data	15,500	No data	No data	750,000	15,000	2	No data

Member State	Urban public transport activities (NACE 49.31, 49.32)				Rest of road transport activities (NACE 49.39, 49.41, 49.92)			
	Total workforce	Workforce of the three largest companies	Proportion of workforce covered by the three largest companies, %	Collective bargaining at company level?	Total workforce	Workforce of the three largest companies	Proportion of workforce covered by the three largest companies, %	Collective bargaining at company level?
PT	No data	5,451	No data	All 3	86,360	4,500	5	0 (CB at sector level)
RO	No data	17,314	No data	2	126,283	3,648	3	No data
SE	No data	17,810	No data	0 (CB at sector level)	180,000	20,796	12	0 (CB at sector level)
SK	10,000	6,269	63	All 3	54,841	2,406	4	All 3
SI	No data	7,895	No data	All 3	31,405	2,152	7	All 3

**Note:** CB, collective bargaining.

**Source:** Network of Eurofound Correspondents, 2022

Table 23 sets out the workforce of the three largest companies in urban public transport and the rest of road transport in each of the Member States. In urban public transport, the 79 companies included across the EU27 have a total workforce of 445,011 employees. The 37 companies organised by trade unions affiliated with the ETF have a total workforce of 321,207 employees, which corresponds to 72% of the workforce of the 79 companies included in the table.

The green-shaded cells indicate the companies that are affiliated only with the UITP either directly or indirectly through an employer organisation. There are 54 companies in urban public transport either directly or indirectly affiliated with the UITP, with a combined workforce of 400,130 employees, which makes up 90% of the total workforce of the 79 urban public transport companies included in the table.

The blue-shaded cells indicate companies that are affiliated only with the IRU and the grey-shaded cells indicate companies that are affiliated with both the IRU and UITP. The 12 companies in urban public transport affiliated with employer organisations that are members of the IRU have a collective workforce of 64,536 employees, which makes up 15% of the total workforce of the 79 urban public transport companies included in the table.

In the rest of road transport, 70 companies across the EU27 are included in Table 23. The 33 companies organised by trade unions affiliated with the ETF have a total workforce of 151,176 employees, which makes up 63% of the total workforce of the 70 companies included in the table. The 30 companies affiliated with an employer organisation that is a member of the IRU have a collective workforce of 64%. The 14 UITP-affiliated companies make up 40% of the total workforce of the three largest companies in the rest of road transport, while those companies with a double affiliation make up 29%.

Table 23: European affiliations of the three largest companies in Member States

Member State	Urban public transport				Rest of road transport			
	Largest	Second largest	Third largest	Organised by the ETF	Largest	Second largest	Third largest	Organised by the ETF
AT	8,700	3,900	1,510	14,110	3,900	2,700		6,600
BE	10,000	10,000	5,500	25,500	3,000	1,300	1,100	5,400
BG	2,033	2,000	1,917	5,950	2,000	1,632	900	
CY	600	250	180		155	80	15	
CZ	11,051	2,547	2,044		1,700	1,400	1,000	
DE	15,800	7,000	6,000	28,800	15,800	13,000	11,000	39,800
DK	1,400	1,328	1,245	3,973	1,025	996	875	2,896
EE	2,100	700	350		2,100	734	645	
EL	4,921	2,280	1,500					
ES	9,366	8,516	7,291	25,173	14,981	3,616		18,597
FI	2,500	1,400	1,300	5,200	2,500	1,500	1,400	5,400
FR	44,332	27,000	17,000	88,332	27,000	17,000	10,000	54,000
HR	3,600	700	340		1,330	1,330	170	
HU	10,345	691	644		18,299	5,857	1,260	
IE	4,058	2,702	3,573	10,333	3,000	600	500	3,600
IT	82,000	11,000	10,000	103,000	5,000	2,800	2,200	10,000
LT	1,800	1,700	320		2,700	2,600	2,300	
LU	1,124	1,010	357	2,491	435	362	251	1,048
LV	3,700	500	450	450	2,427	455	328	783
MT	1,300							
NL	6,000	5,500	5,000		5,000	2,000	2,000	
PL	1,000	2,297	3,000					
PT	2,600	1,516	1,335		2,000	1,000	1,500	
RO	10,927	5,174	1,213		1,008	912	728	
SE	7,000	6,200	4,610		13,554	5,200	2,042	
SI	6,752	846	297	7,895	1,091	638	423	2,152
SK	2,779	2,500	990		900	900	606	900
EU27	445,011			321,207 72%	240,760			151,176 63%
IRU members	64,536 15%				153,060 64%			
UITP members	400,130 90%				96,903 40%			
Double affiliation	52,429 12%				69,454 29%			

**Notes:** Green-shaded cells indicate the companies that are affiliated with the UITP only, blue-shaded cells indicate companies that are affiliated with the IRU only and grey-shaded cells indicate companies that are affiliated with both the IRU and UITP.

## 3. European level of interest representation

This chapter presents detailed data on the representativeness of the European-level social partners in the road transport sector. There are three social partners listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU. The European organisation representing the trade unions, and thus the workforce, in this sector is the ETF. The employers in the sector are represented at European level by the IRU (road transport and urban public transport) and the UITP (urban public transport).

The representativeness of the European-level social partners is assessed in this study in three ways. First, the membership strength of the European-level social partner organisations on both sides is examined, based on the membership domains covered by their national affiliates (in Section 3.1 for the trade unions and in Sections 3.2 and 3.3 for the employer organisations). Second, the social partners' capacity to negotiate is analysed (in Section 3.7); this means their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored across the EU. This capacity to negotiate depends on the involvement of the social partners' affiliates in collective bargaining at national level, which ensures not only that they can provide an effective mandate for discussion and negotiation at European level, but also that they are able to implement European-level agreements. Third, the social partners' effective participation in ESSDC meetings is assessed (in Section 3.8). Finally, the limits of the representativeness of the social partners involved in the ESSDC for the road transport sector are assessed in two ways: first, by looking at the national organisations not represented by the organisations involved in the ESSDC (in Sections 3.4 and 3.5) and, second, by considering the representativeness of any other European associations in the sector (in Section 3.6).

### 3.1. Representativeness of the ETF

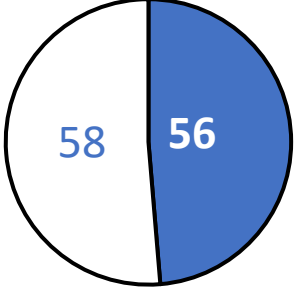
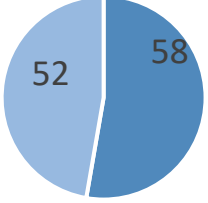
#### 3.1.1. Overview of ETF representativeness

The ETF affiliates 56 unions in the sector (Figure 10), which represents 49% of all 114 sector unions identified in the study (see Section 2.1), in 23 Member States (there are no ETF-affiliated unions in Croatia, Cyprus, Greece or Portugal). This accounts for over 80% of all trade union members in the sector. Of these ETF members, 52 unions are involved in collective bargaining, namely 47% of all sector unions that are involved in collective bargaining, in 23 Member States (Croatia, Cyprus, Greece and Portugal are excluded). Of the 104 trade unions that are representative<sup>24</sup> in the national industrial relations system, 54 unions (52%) are affiliated with the ETF in 23 Member States. In 22 Member States, the largest sectoral trade union is affiliated; for Hungary this is not the case.

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<sup>24</sup> Please note that there are more unions involved in collective bargaining than the number of unions that are considered representative in the sector. As shown in Table 16, there are seven unions in Spain and one union in France that are not considered representative but do participate in collective bargaining processes at company level. In turn, one union in Malta and two unions in Poland are considered representative but do not participate in collective bargaining processes. See the country profiles in Annex 1 for further information.

Figure 10: Scoreboard illustrating the representativeness of the ETF

49% of trade unions with members in the sector are affiliated with the ETF (56/114)	23 Member States have an ETF-affiliated trade union			47% of trade unions involved in sector-related collective bargaining are affiliated with the ETF (52/110)	In 23 Member States, the ETF has a member involved in collective bargaining in the sector		
	AT	ES	LV		AT	ES	LV
	BE	FI	MT		BE	FI	MT
	BG	FR	NL		BG	FR	NL
	CY	HR	PL		CY	HR	PL
	CZ	HU	PT		CZ	HU	PT
	DE	IE	RO		DE	IE	RO
	DK	IT	SE		DK	IT	SE
	EE	LT	SI		EE	LT	SI
	EL	LU	SK		EL	LU	SK
			<b>Urban public transport</b>	<b>Rest of road transport</b>	<b>Whole road transport sector</b>	<b>Source</b>	
Total number of members in trade unions affiliated with the ETF			311,112	333,974	645,086	Table 27	
Total number of members of all trade unions in the sector			356,514	398,216	754,730	Table 15	
Total number of workers in the sector			1,285,323	3,790,233	5,075,556	Table 2	
Proportion of all trade union members, %			87.27	83.87	85.47		
Proportion of all workers in the sector, %			24.20	8.81	12.71		
Member States where all trade unions are affiliated with the ETF (24 trade unions)			9: AT (4), DK (3), EE (1), IT (3), LT (4), LU (3), LV (1), RO (2), SE (3)				
Member States where some trade unions are affiliated with the ETF, but not all (32 affiliated/32 not affiliated)			14: BE (6/7), BG (2/3), CZ (1/2), DE (2/3), ES (2/14), FI (4/5), FR (4/7), HU (2/5), IE (2/4), MT (1/2), NL (2/3), PL (2/4), SI (1/3), SK (1/2)				
Member States where no trade union is affiliated with the ETF (26 trade unions)			4: CY (2), EL (8), HR (5), PT (11)				
Member States where the largest sectoral trade union is affiliated with the ETF			22: AT, BE, BG, CZ, DE, DK, EE, ES, FI, FR, IE, IT, LT, LU, LV, MT, NL, PL, RO, SE, SI, SK				

In nine Member States, all of the national sectoral trade unions are affiliated with the ETF: Austria, Denmark, Estonia, Italy, Latvia, Lithuania, Luxembourg, Romania and Sweden. In the remaining 18 Member States, not all sector unions are affiliated with the ETF. This includes four Member States where there are no sector trade unions affiliated with the ETF: Croatia, Cyprus, Greece and Portugal. In 13 Member States, at least one sector union is affiliated with the ETF and, of these, ETF members are the largest or second largest sector unions in most: Belgium, Bulgaria, Czechia, Finland, France, Germany, Ireland, Malta, the Netherlands, Poland, Slovakia, Slovenia and Spain. The exception to this is the Hungarian member KSZOSZ, which is among the smaller trade unions in the sector in the country.

The country profiles in Annex 1 provide further details about the membership strength of ETF members in the Member States.

Table 24 summarises the sector-relatedness and the extent of overlap of ETF affiliates in the different parts of the sector.

First, the analysis of the sector-relatedness of ETF affiliates is undertaken from the perspective of the affiliates organising members in both urban public transport activities and the rest of road transport (the whole road transport sector), in urban public transport only and in the rest of road transport only. This shows that most (36) of the ETF affiliates are overlapping, organising members in both urban public transport and the rest of road transport (the whole road transport sector). Fifteen ETF affiliates organise in urban public transport activities only and five organise in the rest of road transport only.

Table 24: General sector-relatedness and overlap of ETF affiliates

Entire road transport ESSDC	Urban public transport working group	Rest of road transport working group	Detailed analyses	
			56/114 trade unions affiliated (49%)	51/101 trade unions (50%) (36/51 = 71% overlap)
		41/67 trade unions (61%) (36/41 = 88% overlap)	36/54 trade unions covering both urban public transport and the rest of road transport (whole road transport sector) are affiliated with the ETF (67%)	64% of all ETF affiliates
			5/13 trade unions covering the rest of road transport only (NACE 49.39, 49.41, 49.92) are affiliated with the ETF (38%)	9% of all ETF affiliates

**Note:** See Table 25 for further analysis.

**Source:** Network of Eurofound Correspondents

Table 25 shows a detailed overview of ETF affiliates' membership in the five different segments of the road transport sector.

Table 25: Detailed sector-relatedness and overlap of ETF affiliates

Segments in the sector	Affiliated trade unions organising members	Number of Member States with an ETF-affiliated trade union/number of Member States with a trade union	Member States with trade unions but not affiliated with the ETF
NACE 49.31: Urban and suburban passenger land transport	44 ETF affiliates 49% of all 89 trade unions organising in this activity	23/27	4: CY, EL, HR, PT
NACE 49.32: Taxi operation	32 ETF affiliates 59% of all 54 trade unions organising in this activity	18/25	7: CY, EL, FR, HR, HU, PT, SI
NACE 49.39: Other passenger land transport	39 ETF affiliates 68% of all 57 trade unions organising in this activity	23/27	4: CY, EL, HR, PT
NACE 49.41: Freight transport by road	40 ETF affiliates 68% of all 59 trade unions organising in this activity	22/27	5: CY, EL, FR, HR, PT
NACE 49.92: Removal services	33 ETF affiliates 80% of all 41 trade unions organising in this activity	15/21	6: CY, EL, FR, HR, PT, SI

**Note:** See Table 26 for full analysis.

**Source:** Network of Eurofound Correspondents

### 3.1.2. Sector-relatedness of ETF affiliates

In this section, we present the analysis of the sector-relatedness of ETF affiliates, first from the perspective of the affiliates organising members in both urban public transport and the rest of road transport, in urban public transport only and in the rest of road transport only. This is then followed by the detailed analysis of ETF affiliates' membership in the five different segments of the road transport sector.

As shown in Table 26, 64% (36) of ETF sector-related affiliates organise members in both urban public transport and the rest of road transport (the whole road transport sector) in 19 Member States. Meanwhile, 15 affiliates organise members in urban public transport activities only in 12 Member States and five organise members in the rest of road transport only in five Member States.

Table 26: General sector-relatedness of ETF member trade unions in the sector

Member State	Trade union	Organises members in the following sectors?		
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)
<b>Total number</b>	<b>114</b>	<b>54</b>	<b>47</b>	<b>13</b>
<b>Number of Member States</b>	<b>27</b>	<b>26</b>	<b>20</b>	<b>9</b>
Number of ETF-affiliated trade unions organising this activity		36	15	5
Proportion of all affiliated trade unions, %		64	27	9

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?		
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)
Number of Member States with an ETF-affiliated trade union		19	12	5
AT	vida (whole road transport)	Yes		
AT	GPF (whole road transport)	Yes		
AT	GPA (whole road transport)	Yes		
AT	younion (urban public transport)		Yes	
BE	ACLVB-CGSLB	Yes		
BE	ACV-CSC Transcom	Yes		
BE	ACV-CSC Public Services		Yes	
BE	ABVV-FGTB ACOD-CGSP (urban public transport)		Yes	
BE	ACV-CSC Puls (rest of road transport)			Yes
BE	ABVV-FGTB BTB-UBT (whole road transport)	Yes		
BG	FTTU (whole road transport)	Yes		
BG	FTW Podkrepa (urban public transport)		Yes	
CZ	OSD (whole road transport)	Yes		
DE	Ver.di (whole road transport)	Yes		
DE	EVG (urban public transport)		Yes	
DK	3F (whole road transport)	Yes		
DK	DJF (urban public transport)		Yes	
DK	HK Privat (urban public transport)		Yes	
EE	ETTA (whole road transport)	Yes		
ES	FSC-CCOO (whole road transport)	Yes		
ES	UGT-FeSMC (whole road transport)	Yes		
FI	AKT (whole road transport)	Yes		
FI	ERTO (whole road transport)	Yes		
FI	JHL (urban public transport)		Yes	
FI	RAU (urban public transport)		Yes	
FR	CFTC Transports (whole road transport)	Yes		
FR	FGTE CFDT (whole road transport)	Yes		
FR	FNST CGT (whole road transport)	Yes		
FR	FNTL FO-UNCP (whole road transport)	Yes		
HU	KSZOSZ (whole road transport)	Yes		
HU	EKSZ (urban public transport)		Yes	
IE	TSSA (whole road transport)	Yes		
IE	SIPTU (whole road transport)	Yes		



Member State	Trade union	Organises members in the following sectors?		
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)
IT	FILT-CGIL (whole road transport)	Yes		
IT	FIT-CISL (whole road transport)	Yes		
IT	UILTrasporti (whole road transport)	Yes		
LT	LKADPSF (whole road transport)	Yes		
LT	TDF (urban public transport)		Yes	
LT	BTSPS 'Solidarumas'			Yes
LT	LVPS			Yes
LU	OGB-L Road Transport and Navigation Trade Union (whole road transport)	Yes		
LU	LCGB-Transport (whole road transport)	Yes		
LU	Syprolux (urban public transport)		Yes	
LV	LAKRS (whole road transport)	Yes		
MT	GWU (whole road transport)	Yes		
NL	FNV (whole road transport)	Yes		
NL	CNV (whole road transport)	Yes		
PL	KS KM NSZZ 'Solidarność'		Yes	
PL	KSTD NSZZ 'Solidarność' (rest of road transport)			Yes
RO	SLT (rest of road transport)			Yes
RO	ATU-România (urban public transport)		Yes	
SE	Kommunal (whole road transport)	Yes		
SE	Transport (whole road transport)	Yes		
SE	SEKO (urban public transport)		Yes	
SI	ZSSS-SDPZ (whole road transport)	Yes		
SK	OZ KOVO (whole road transport)	Yes		

Source: Network of Eurofound Correspondents

Table 27 shows a detailed breakdown of the sector-relatedness of the 56 ETF members in the sector, namely with respect to the different segments of the road transport sector where the ETF members organise workers. In total, five such segments were identified in the study, and the extent of ETF members representing workers in each of these segments is analysed below. Overall, ETF affiliates organise around 645,000 workers in the sector (based on the available membership data). Considered against the total sector employment of around 4.9 million workers, ETF affiliates account for around 13% of sector workers.

In **urban and suburban transport (NACE 49.31) activities**, 44 ETF members in 23 Member States organise such workers. This represents 49% of all of the trade unions organising workers in this segment of the sector, in 23 of the 27 Member States where unions organise such workers.

In five Member States, the ETF has affiliated all of the trade unions organising workers in urban and suburban transport activities: Denmark, Estonia, Italy, Latvia and Luxembourg.

In 18 Member States, the ETF has affiliated some but not all of the trade unions organising workers in urban and suburban transport activities. In all 18 Member States, the ETF affiliates organising workers in urban and suburban transport activities are the largest or second largest union in the sector.

In **taxi operations (NACE 49.32)**, 32 ETF members in 18 Member States organise such workers. This represents 59% of all of the trade unions organising workers in this segment of the sector, in 18 out of the 25 Member States where unions organise such workers.

In two Member States, the ETF has affiliated all of the trade unions organising workers in taxi operations: Italy and Latvia.

In 16 Member States, the ETF has affiliated some but not all of the trade unions organising workers in taxi operations. In 15 of these Member States, the ETF affiliates organising workers in taxi operations are the largest or second largest union in the sector. The exception to this is the ETF affiliate in Malta, which appears to be a smaller trade union in the sector organising workers in taxi operations.

In **passenger road transport (NACE 49.39)**, 39 ETF members in 23 Member States organise such workers. This represents 68% of all of the trade unions organising workers in this segment of the sector, in 23 out of the 27 Member States where unions organise such workers.

In three Member States, the ETF has affiliated all of the trade unions organising workers in passenger road transport activities: Estonia, Italy and Sweden. In 20 Member States, the ETF has affiliated some but not all of the trade unions organising workers in passenger road transport activities. In 19 of these Member States, the ETF affiliates organising workers in passenger road transport activities are the largest or second largest union in the sector. The exception to this is the ETF affiliates in Hungary, which appear to be smaller trade unions in the sector.

In **freight road transport (NACE 49.41) activities**, 40 ETF members in 22 Member States organise such workers. This represents 68% of all of the trade unions organising workers in this segment of the sector, in 22 out of the 27 Member States where unions organise such workers.

In three Member States, the ETF has affiliated all of the trade unions organising workers in freight road transport activities: Estonia, Italy and Latvia.

In 19 Member States, the ETF has affiliated some but not all of the trade unions organising workers in freight road transport activities. In all 19 Member States, the ETF affiliates organising workers in freight road transport activities are the largest or second largest union in the sector. In one Member State, the ETF member does not organise workers in freight road transport (OZ KOVO in Slovakia).

In **removal services (NACE 49.92)**, 33 ETF members in 15 Member States organise such workers. This represents 80% of all of the trade unions organising workers in this segment of the sector, in 15 out of the 21 Member States where unions organise such workers.

In two Member States, the ETF has affiliated all of the trade unions organising workers in removal services: Italy and Latvia.

In 13 Member States, the ETF has affiliated some but not all of the trade unions organising workers in removal services. In all 13 Member States, the ETF affiliates organising workers in removal services are the largest or second largest union in the sector. In six Member States, ETF members do not organise workers in removal services (Czechia, Lithuania, Malta, Romania, Slovakia and Slovenia).

Table 27: Detailed sector-relatedness of ETF affiliates in five segments of the road transport sector

Member State	Trade union	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Organises members in the following sectors?					Affiliated with the ETF?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
<b>Total number</b>		<b>114</b>				<b>89</b>	<b>54</b>	<b>57</b>	<b>59</b>	<b>41</b>	<b>56</b>
<b>Number of Member States</b>		<b>27</b>				<b>27</b>	<b>25</b>	<b>27</b>	<b>27</b>	<b>21</b>	<b>23</b>
<b>Number of ETF-affiliated trade unions</b>		<b>311,112</b>		<b>333,974</b>		<b>44</b>	<b>32</b>	<b>39</b>	<b>40</b>	<b>33</b>	<b>56</b>
<b>Proportion of all trade unions in this segment, %</b>						<b>49</b>	<b>59</b>	<b>68</b>	<b>68</b>	<b>80</b>	<b>49</b>
<b>Number of Member States with an ETF-affiliated trade union</b>						<b>23</b>	<b>18</b>	<b>23</b>	<b>22</b>	<b>15</b>	<b>23</b>
AT	vida	No data	1	No data	1	Yes	Yes	Yes	Yes	Yes	Yes
AT	younion	No data	2	No members		Yes					Yes
AT	GPF	No data	3	No data	2	Yes		Yes			Yes
AT	GPA	No data	4	6,684	3		Yes		Yes	Yes	Yes
BE	ACLVB-CGLSB (whole road transport)	5,129	2	No data		Yes	Yes	Yes	Yes	Yes	Yes
BE	ABVV-FGTB BTB-UBT (whole road transport)	4,800	3	35,000	1	Yes		Yes	Yes	Yes	Yes
BE	ACV-CSC Transcom (whole road transport)	No data		No data		Yes	Yes	Yes	Yes	Yes	Yes
BE	ACV-CSC Public Services (urban public transport)	3,500		No members		Yes		Yes	Yes	Yes	Yes
BE	ABVV-FGTB ACOD-CGSP (urban public transport)	10,883	1	No members		Yes	Yes	Yes	Yes	Yes	Yes
BE	ACV-CSC Puls (rest of road transport)	No members		11,000	2			Yes	Yes	Yes	Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Organises members in the following sectors?					Affiliated with the ETF?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
BG	FTTU (whole road transport)	4,393	1	No data		Yes		Yes	Yes	Yes	Yes
BG	FTW Podkrepa (urban public transport)	2,400	2	No members		Yes				Yes	Yes
CZ	OSD (whole road transport)	No data	2	No data	2	Yes	Yes	Yes	Yes		Yes
DE	Ver.di	127,000	1	No data	1	Yes	Yes	Yes	Yes	Yes	Yes
DE	EVG	8,500	3	No members		Yes					Yes
DK	3F	7,000	1	37,000	1	Yes	Yes	Yes	Yes	Yes	Yes
DK	DJF	1,392	2	No members		Yes					Yes
DK	HK Privat	500	3	No members		Yes	Yes				Yes
EE	ETTA	1,000	1	200	1	Yes		Yes	Yes		Yes
ES	UGT-FeSMC	10,000	2	24,000	1	Yes	Yes	Yes	Yes	Yes	Yes
ES	FSC-CCOO	12,000	1	22,000	2		Yes	Yes	Yes	Yes	Yes
FI	AKT (whole road transport)	5,000	1	20,000	1	Yes	Yes	Yes	Yes	Yes	Yes
FI	ERTO (whole road transport)	No data		No data			Yes			Yes	Yes
FI	JHL (urban public transport)	No data		No members				Yes			Yes
FI	PAM (rest of road transport)	No members		294				Yes			Yes
FR	CFTC Transports	No data		3,000		Yes	Yes	Yes	Yes	Yes	Yes
FR	FGTE CFDT	No data	1	50,000	1	Yes	Yes	Yes	Yes	Yes	Yes
FR	FNST CGT	8,996	3	34,500	2	Yes	Yes	Yes	Yes	Yes	Yes
FR	FNTL FO-UNCP	10,000	2	30,000	3	Yes	Yes	Yes	Yes	Yes	Yes
HU	KSZOSZ (whole road transport)	450	3	1,100	3	Yes		Yes	Yes		Yes
HU	EKSZ (urban public transport)	1,364	1	No members		Yes					Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Organises members in the following sectors?					Affiliated with the ETF?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
IE	TSSA (whole road transport)	782	3	No data		Yes	Yes	Yes	Yes	Yes	Yes
IE	SIPTU (whole road transport)	4,402	1–2	1,110	1	Yes	Yes	Yes	Yes	Yes	Yes
IT	FILT-CGIL	No data	1–2	No data	1–2	Yes	Yes	Yes	Yes	Yes	Yes
IT	FIT-CISL	No data	1–2	No data	1–2	Yes	Yes	Yes	Yes	Yes	Yes
IT	UILTrasporti	21,000	3	1,100	3	Yes	Yes	Yes	Yes	Yes	Yes
LT	TDF	450	2	860	2–3	Yes					Yes
LT	LKADPSF	1,450	1	No members		Yes		Yes	Yes		Yes
LT	BTPS 'Solidarumas'	No members		2,000	1		Yes	Yes	Yes		Yes
LT	LVPS	No members		800	2–3		Yes	Yes	Yes		Yes
LU	Syprolux	1,900	2–3	No members		Yes					Yes
LU	OGB-L Road Transport and Navigation Trade Union	2,200	1–2	2,200	1–2	Yes	Yes	Yes	Yes	Yes	Yes
LU	LCGB-Transport	2,500	1–2	2,500	1–2	Yes	Yes	Yes	Yes	Yes	Yes
LV	LAKRS	310	1	615	1	Yes	Yes	Yes	Yes	Yes	Yes
MT	GWU	200	2	Very small		Yes	Yes	Yes	Yes		Yes
NL	FNV	12,350	1	>7,000	1–2	Yes	Yes	Yes	Yes	Yes	Yes
NL	CNV	3,000	2	7,000	1–2	Yes	Yes	Yes	Yes	Yes	Yes
PL	OPZZ (whole road transport)	1,400	3	4,300	1	Yes	Yes		Yes	Yes	Yes
PL	KSTD NSZZ 'Solidarność' (rest of road transport)	No members		1,000	2		Yes	Yes	Yes	Yes	Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport activities (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Organises members in the following sectors?					Affiliated with the ETF?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
RO	SLT	No members		1,500	1			Yes	Yes		Yes
RO	ATU-România	17,557	1	No members		Yes					Yes
SE	Kommunal	17,500	1	8,100	2	Yes	Yes	Yes	Yes	Yes	Yes
SE	Transport	2,004	3	18,611	1			Yes			Yes
SE	SEKO	11,300	2	No data				Yes			Yes
SI	ZSSS-SDPZ (whole road transport)	No data	1–2	No data	1–2	Yes	Yes	Yes	Yes		Yes
SK	OZ KOVO	4,000	1	500	1	Yes		Yes			Yes

Source: Network of Eurofound Correspondents, 2022

Table 28 provides an overview of the sector-relatedness of the ETF affiliates for the detailed categories of urban public transport activities.

Table 28: Specific sector-relatedness of ETF member trade unions for detailed categories of urban public transport activities

Member State	Trade union	Active in the following categories of urban and suburban passenger land transport (NACE 49.31)?							Active in the following categories of taxi operation (NACE 49.32)?		Organises employees in the following urban public transport categories?					Organises workers of the following types?						
		Bus	Light tram	Metro	Regional rail	Trolley	Urban public transport (water)	Shared transport services	Classic taxi operations	Private hire vehicles	Capital city	Second largest city	Third largest city	Rural urban public transport	Subcontracted providers	Blue collar	White collar	Management	Maintenance staff	Self-employed	Subcontracted drivers	Other categories
Number of ETF-affiliated trade unions organising this activity		39	26	25	15	22	8	9	28	20	47	41	42	36	24	40	39	30	29	15	14	8

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Active in the following categories of urban and suburban passenger land transport (NACE 49.31)?									Active in the following categories of taxi operation (NACE 49.32)?		Organises employees in the following urban public transport categories?					Organises workers of the following types?					
		Bus	Light tram	Metro	Regional rail	Trolley	Urban public transport (water)	Shared transport services	Classic taxi operations	Private hire vehicles	Capital city	Second largest city	Third largest city	Rural urban public transport	Subcontracted providers	Blue collar	White collar	Management	Maintenance staff	Self-employed	Subcontracted drivers	Other categories	
Proportion of all affiliated trade unions, %		70	46	45	27	39	14	16	50	36	84	73	75	64	43	71	70	54	52	27	25	14	
Number of Member States with an ETF-affiliated trade union		19	13	11	9	10	6	5	13	10	23	21	22	19	16	23	23	13	13	8	9	7	
AT	vida	Yes	Yes		Yes	Yes		Yes	Yes	Yes	Yes <sup>25</sup>	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
AT	younion	Yes	Yes	Yes		Yes			Yes	Yes					Yes	Yes	Yes	Yes					
AT	GPF	Yes								Yes	Yes	Yes	Yes									Yes <sup>26</sup>	
AT	GPA						Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes		Yes				
BE	ACV-CSC Transcom	Yes	Yes	Yes		Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes							
BE	ACV-CSC Public Services	Yes	Yes	Yes		Yes				Yes	Yes	Yes	Yes	Yes	Yes	Yes						Public servants	
BE	ABVV-FGTB BTB-UBT	Yes	Yes	Yes		Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes								
BE	ABVV-FGTB ACOD-CGSP	Yes	Yes	Yes		Yes				Yes	Yes	Yes	Yes	Yes	Yes	Yes						Public servants	
BE	ACLVB-CGSLB	Yes	Yes	Yes		Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes						Public servants	
BG	FTTU	Yes	Yes	Yes	Yes	Yes				Yes		Yes	Yes					Yes					
BG	FTW Podkrepa	Yes	Yes	Yes		Yes				Yes		Yes			Yes	Yes		Yes		Yes			
BG	SJB			Yes						Yes								Yes					

<sup>25</sup> Only taxis, not the rest of urban public transport.

<sup>26</sup> Public employees of Postbus AG (private-law employees of Postbus are covered by vida).

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Active in the following categories of urban and suburban passenger land transport (NACE 49.31)?									Active in the following categories of taxi operation (NACE 49.32)?		Organises employees in the following urban public transport categories?					Organises workers of the following types?					
		Bus	Light tram	Metro	Regional rail	Trolley	Urban public transport (water)	Shared transport services	Classic taxi operations	Private hire vehicles	Capital city	Second largest city	Third largest city	Rural urban public transport	Subcontracted providers	Blue collar	White collar	Management	Maintenance staff	Self-employed	Subcontracted drivers	Other categories	
DE	Ver.di	Yes	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Platform workers	
DE	EVG	Yes			Yes			Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes			
DK	3F	Yes						Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes							
DK	DJF		Yes	Yes	Yes <sup>27</sup>						Yes	Yes	Yes	Yes					Yes				
DK	HK Privat	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes						
EE	ETTA	Yes	Yes			Yes					Yes			Yes		Yes							
ES	UGT-FeSMC	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes			
ES	FSC-CCOO	Yes	Yes	Yes					Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	
FI	AKT	Yes							Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes			Yes	Yes	Yes		
FI	ERTO								Yes		Yes						Yes						
FI	JHL		Yes	Yes	Yes						Yes	Yes	Yes	Yes		Yes	Yes						
FI	RAU				Yes						Yes	Yes	Yes			Yes	Yes						
FR	CFTC Transports	Yes	Yes	Yes		Yes			Yes							Yes	Yes	Yes					
FR	FGTE CFDT	Yes	Yes	Yes		Yes			Yes		Yes	Yes	Yes			Yes	Yes	Yes					
FR	FNST CGT	Yes	Yes	Yes		Yes			Yes		Yes	Yes	Yes			Yes	Yes	Yes					
FR	FNTL FO-UNCP	Yes	Yes	Yes		Yes			Yes							Yes	Yes	Yes	Yes				
HU	KSZOSZ	Yes									Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes				
IE	TSSA	Yes			Yes						Yes	Yes	Yes	Yes			Yes	Yes					
IE	SIPTU	Yes	Yes		Yes						Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes		Yes		

<sup>27</sup> This includes local/suburban rail.



Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Active in the following categories of urban and suburban passenger land transport (NACE 49.31)?							Active in the following categories of taxi operation (NACE 49.32)?		Organises employees in the following urban public transport categories?					Organises workers of the following types?						
		Bus	Light tram	Metro	Regional rail	Trolley	Urban public transport (water)	Shared transport services	Classic taxi operations	Private hire vehicles	Capital city	Second largest city	Third largest city	Rural urban public transport	Subcontracted providers	Blue collar	White collar	Management	Maintenance staff	Self-employed	Subcontracted drivers	Other categories
IT	FILT-CGIL	Yes	Yes	Yes	Yes	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Platform workers
IT	FIT-CISL	Yes	Yes	Yes	Yes	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Platform workers
IT	UILTrasporti	Yes	Yes	Yes	Yes	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Platform workers
LT	TDF	Yes				Yes					Yes				Yes	Yes	Yes	Yes				
LT	LKADPSF	Yes										Yes		Yes	Yes	Yes	Yes	Yes				
LU	Syprolux	Yes								Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
LU	OGB-L Road Transport and Navigation Trade Union	Yes						Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
LU	LCGB-Transport	Yes						Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
MT	GWU	Yes						Yes	Yes	Yes <sup>28</sup>					Yes	Yes		Yes	Yes			
NL	FNV	Yes	Yes	Yes	Yes	Yes	Yes		Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
NL	CNV	Yes	Yes	Yes	Yes	Yes	Yes		Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
PL	OPZZ									Yes	Yes	Yes			Yes	Yes		Yes				
RO	SLT														Yes	Yes						
SE	Kommunal	Yes	Yes, except Stockholm								Yes	Yes	Yes	Yes	Yes				Yes			
SE	Transport						Yes	Yes	Yes	Yes	Yes	Yes			Yes				Yes			
SE	SEKO		Yes, in Stockholm	Yes	Yes					Yes	Yes	Yes	Yes	Yes	Yes				Yes			

<sup>28</sup> Malta is a small country and there is no distinction between city and countryside. Malta is covered by one company operating the national bus service in which GWU has members.

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Active in the following categories of urban and suburban passenger land transport (NACE 49.31)?								Active in the following categories of taxi operation (NACE 49.32)?		Organises employees in the following urban public transport categories?					Organises workers of the following types?					
		Bus	Light tram	Metro	Regional rail	Trolley	Urban public transport (water)	Shared transport services	Classic taxi operations	Private hire vehicles	Capital city	Second largest city	Third largest city	Rural urban public transport	Subcontracted providers	Blue collar	White collar	Management	Maintenance staff	Self-employed	Subcontracted drivers	Other categories
SE	ST				Yes					Yes	Yes	Yes				Yes	Yes					
SI	ZSSS-SDPZ	Yes						Yes		Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes		Yes		
SK	OZ KOVO	Yes										Yes										

Table 29 provides an overview of the sector-relatedness of the ETF affiliates for the detailed categories of the rest of road transport.

Table 29: Specific sector-relatedness of ETF member trade unions for the detailed categories of the rest of road transport

Member State	Trade union	Active in the following categories of other passenger land transport (NACE 49.39)?			Active in the following categories of freight transport by road (NACE 49.41)?		Active in removal services (NACE 49.92)?	Workers employed in sectoral companies of the following sizes?			
		Bus drivers in occasional tourism	Bus drivers in scheduled services	Bus drivers in school/work transport	Large truck drivers (>3.5 tonnes)	Van drivers (<3.5 tonnes)	Removal service drivers	1–9 employees	10–49 employees	50–249 employees	Over 250 employees
Number of ETF-affiliated trade unions organising this activity		31	33	31	31	30	26	33	36	43	50
Proportion of all affiliated trade unions, %		55	59	55	55	54	46	59	64	77	89
Number of Member States with an ETF-affiliated trade union		17	18	17	18	16	11	15	16	19	23
AT	vida	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
AT	younion										Yes
AT	GPF		Yes	Yes							Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Active in the following categories of other passenger land transport (NACE 49.39)?			Active in the following categories of freight transport by road (NACE 49.41)?		Active in removal services (NACE 49.92)?	Workers employed in sectoral companies of the following sizes?			
		Bus drivers in occasional tourism	Bus drivers in scheduled services	Bus drivers in school/work transport	Large truck drivers (>3.5 tonnes)	Van drivers (<3.5 tonnes)	Removal service drivers	1–9 employees	10–49 employees	50–249 employees	Over 250 employees
AT	GPA				Yes	Yes	Yes	Yes	Yes	Yes	Yes
BE	ACV-CSC Transcom	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BE	ACV-CSC Public Services	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BE	ABVV-FGTB BTB-UBT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BE	ABVV-FGTB ACOD-CGSP	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BE	ACLVB-CGSLB	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BG	FTTU									Yes	Yes
BG	FTW Podkrepa									Yes	Yes
BG	SJB										Yes
DE	Ver.di	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
DE	EVG									Yes	Yes
DK	3F	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
DK	DJF								Yes	Yes	Yes
DK	HK Privat							Yes	Yes	Yes	Yes
EE	ETTA	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
ES	UGT-FeSMC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
ES	FSC-CCOO	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
FI	AKT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
FI	ERTO						Yes				
FI	JHL								Yes	Yes	Yes
FI	RAU									Yes	Yes
FR	CFTC Transports	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Active in the following categories of other passenger land transport (NACE 49.39)?			Active in the following categories of freight transport by road (NACE 49.41)?		Active in removal services (NACE 49.92)?	Workers employed in sectoral companies of the following sizes?			
		Bus drivers in occasional tourism	Bus drivers in scheduled services	Bus drivers in school/work transport	Large truck drivers (>3.5 tonnes)	Van drivers (<3.5 tonnes)	Removal service drivers	1–9 employees	10–49 employees	50–249 employees	Over 250 employees
FR	FGTE CFDT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
FR	FNST CGT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
FR	FNTL FO-UNCP	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
HU	KSZOSZ		Yes		Yes	Yes					Yes
IE	TSSA										Yes
IE	SIPTU	Yes	Yes	Yes						Yes	Yes
IT	FILT-CGIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
IT	FIT-CISL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
IT	UILTrasporti	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LT	TDF									Yes	Yes
LT	LKADPSF	Yes	Yes		Yes	Yes				Yes	Yes
LU	Syprolux										Yes
LU	OGB-L Road Transport and Navigation Trade Union	Yes	Yes	Yes	Yes	Yes	Yes				Yes
LU	LCGB-Transport	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
MT	GWU	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
NL	FNV	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
NL	CNV	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
PL	OPZZ								Yes	Yes	Yes
RO	SLT				Yes			Yes	Yes	Yes	Yes
SE	Kommunal	Yes	Yes	Yes				Yes	Yes	Yes	Yes
SE	Transport	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
SE	SEKO							Yes	Yes	Yes	Yes
SE	ST										Yes

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Active in the following categories of other passenger land transport (NACE 49.39)?			Active in the following categories of freight transport by road (NACE 49.41)?		Active in removal services (NACE 49.92)?	Workers employed in sectoral companies of the following sizes?			
		Bus drivers in occasional tourism	Bus drivers in scheduled services	Bus drivers in school/work transport	Large truck drivers (>3.5 tonnes)	Van drivers (<3.5 tonnes)		Removal service drivers	1–9 employees	10–49 employees	50–249 employees
SI	ZSSS-SDPZ	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
SK	OZ KOVO	Yes	Yes	Yes							

### 3.1.3. ETF affiliates in the industrial relations landscape at national and EU levels

Table 30 sets out the position in the industrial relations landscape and collective bargaining processes of the ETF affiliates in 23 Member States (there is no ETF affiliate in Croatia, Cyprus, Greece or Portugal). Of the 104 trade unions that are representative in the national industrial relations system, 55 unions (53%) are affiliated with the ETF in 22 Member States. One ETF member was reported as not representative in the national industrial relations system: SLT in Romania. SLT is not involved in collective bargaining or social dialogue and is also not consulted by the Romanian government on sector-related matters. The only role that SLT reported in the sectoral industrial relations landscape relates to its involvement in industrial action.

Among ETF members, 36 are involved in social dialogue activities; 51 are consulted by the government on the sector-related matters; 52 are involved in collective bargaining processes at either sector or company level or both; and 22 have been involved in industrial action in the sector in the past three years. One affiliate is also affiliated with other European organisations, namely SIPTU in Ireland, which is a member of the European Trade Union Institute (ETUI), the International Transport Workers' Federation (ITF) and IndustriAll Europe, as it covers all sectors of the economy.

Table 30: ETF member trade unions in the industrial relations landscape of the entire road transport sector at Member State level

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in collective bargaining in the sector (either sectoral or company level)?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in industrial action in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)							
<b>Total number</b>	<b>114</b>	<b>54</b>	<b>47</b>	<b>13</b>	<b>104</b>	<b>110</b>	<b>69</b>	<b>103</b>	<b>43</b>	<b>56</b>	<b>4</b>
<b>Number of Member States with a trade union</b>		<b>26</b>	<b>20</b>	<b>9</b>	<b>27</b>	<b>27</b>	<b>21</b>	<b>27</b>	<b>19</b>	<b>23</b>	<b>4</b>
<b>Number of ETF-affiliated trade unions in this category</b>		<b>36</b>	<b>15</b>	<b>5</b>	<b>55</b>	<b>52</b>	<b>36</b>	<b>51</b>	<b>22</b>	<b>56</b>	<b>1</b>
<b>Proportion of all trade unions in this category, %</b>		<b>67</b>	<b>32</b>	<b>38</b>	<b>53</b>	<b>47</b>	<b>52</b>	<b>50</b>	<b>51</b>	<b>100</b>	
<b>Number of Member States with an ETF-affiliated trade union</b>		<b>19</b>	<b>12</b>	<b>5</b>	<b>22</b>	<b>23</b>	<b>16</b>	<b>23</b>	<b>13</b>	<b>23</b>	<b>1</b>
AT	vida (whole road transport)	Yes			Yes	Yes		Yes	Yes	Yes	
AT	GPF (whole road transport)	Yes			Yes	Yes	Yes	Yes		Yes	
AT	GPA (whole road transport)	Yes			Yes	Yes		Yes		Yes	
AT	younion (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
BE	ACLVB-CGSLB	Yes			Yes	Yes	Yes	Yes		Yes	
BE	ACV-CSC Transcom	Yes			Yes	Yes	Yes	Yes		Yes	
BE	ACV-CSC Public Services		Yes		Yes	Yes	Yes	Yes		Yes	
BE	ABVV-FGTB ACOD-CGSP (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
BE	ACV-CSC Puls (rest of road transport)			Yes	Yes	Yes	Yes	Yes		Yes	

Representativeness of the European social partner organisations: Road transport sector

BG	FTTU (whole road transport)	Yes			Yes	Yes		Yes		Yes	
BG	FTW Podkrepa (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
CZ	OSD (whole road transport)	Yes			Yes	Yes		Yes	Yes	Yes	
DE	Ver.di (whole road transport)	Yes			Yes	Yes		Yes	Yes	Yes	
DE	EVG (urban public transport)		Yes		Yes	Yes		Yes	Yes	Yes	
DK	3F (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
DK	DJF (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
DK	HK Privat (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
EE	ETTA (whole road transport)	Yes			Yes	Yes	Yes	Yes		Yes	
ES	FSC-CCOO (whole road transport)	Yes			Yes	Yes		Yes	Yes	Yes	
ES	UGT-FeSMC (whole road transport)	Yes			Yes	Yes		Yes	Yes	Yes	
FI	AKT (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
FI	ERTO (whole road transport)	Yes			Yes	Yes	Yes	Yes		Yes	
FI	JHL (urban public transport)		Yes		Yes	Yes	Yes			Yes	
FI	RAU (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
FR	CFTC Transports (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
FR	FGTE CFDT (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
FR	FNST CGT (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	



Representativeness of the European social partner organisations: Road transport sector

FR	FNTL FO-UNCP (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
HU	KSZOSZ (whole road transport)	Yes			Yes	Yes	Yes	Yes		Yes	
HU	EKSZ (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
IE	TSSA (whole road transport)	Yes			Yes				Yes	Yes	
IE	SIPTU (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	ITF, ETUI, IndustriAll Europe
IT	FILT-CGIL (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
IT	FIT-CISL (whole road transport)	Yes			Yes	Yes		Yes	Yes	Yes	
IT	UILTrasporti (whole road transport)	Yes			Yes	Yes		Yes	Yes	Yes	
LT	LKADPSF (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
LT	TDF (urban public transport)		Yes		Yes	Yes		Yes		Yes	
LT	BTPS 'Solidarumas'			Yes	Yes	Yes	Yes	Yes		Yes	
LT	LVPS			Yes	Yes	Yes		Yes		Yes	
LU	OGB-L Road Transport and Navigation Trade Union (whole road transport)	Yes			Yes	Yes		Yes		Yes	
LU	LCGB-Transport (whole road transport)	Yes			Yes	Yes		Yes		Yes	

Representativeness of the European social partner organisations: Road transport sector

LU	Syprolux (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
LV	LAKRS (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
MT	GWU (whole road transport)	Yes			Yes		Yes	Yes		Yes	
NL	FNV (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
NL	CNV (whole road transport)	Yes			Yes	Yes	Yes	Yes	Yes	Yes	
PL	KS KM NSZZ 'Solidarność'		Yes		Yes	Yes	Yes			Yes	
PL	KSTD NSZZ 'Solidarność' (rest of road transport)			Yes	Yes	Yes	Yes	Yes		Yes	Yes
RO	SLT (rest of road transport)			Yes						Yes	
RO	ATU-România (urban public transport)		Yes		Yes	Yes		Yes		Yes	
SE	Kommunal (whole road transport)	Yes			Yes	Yes	Yes	Yes		Yes	
SE	Transport (whole road transport)	Yes			Yes	Yes	Yes	Yes		Yes	
SE	SEKO (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
SI	ZSSS-SDPZ (whole road transport)	Yes			Yes			Yes	Yes	Yes	
SK	OZ KOVO (whole road transport)	Yes			Yes	Yes		Yes		Yes	

Source: Network of Eurofound Correspondents

Table 31 shows the involvement of the ETF affiliates in the ETF internal structures. Fifty-five members in 23 Member States are directly affiliated with the ETF and one member (in Hungary) is affiliated indirectly. Twenty-six members are involved in the management bodies of the ETF, 29 members are involved in the different working groups of the ETF and 46 members pay their fees to the ETF for their road transport workers.

**Table 31: Involvement of ETF member trade unions in the ETF internal structures (ensuring effective participation in the ESSDC) and affiliation with other European organisations**

Member State	Trade union	Directly affiliated with the ETF?	Involved in the management bodies of the ETF?	Payment of fees to the ETF for its road transport workers?	Actively involved in the working groups of the ETF?	Affiliated with any other European organisations for its road transport workers?
<b>Total for all ETF member unions</b>		<b>55</b>	<b>26</b>	<b>46</b>	<b>29</b>	<b>1</b>
<b>Number of Member States with an ETF member union</b>		<b>23</b>	<b>15</b>	<b>21</b>	<b>16</b>	<b>1</b>
AT	vida	Yes	Yes	Yes	Yes	
AT	younion	Yes		Yes	Yes: meetings of the ETF section on road transport and part of the ETF committee on urban public transport	
AT	GPF	Yes, for road transport		Yes		
AT	GPA	Yes				
BE	ACV-CSC Transcom	Yes	Yes	Yes	Yes	
BE	ACV-CSC Public Services	Yes	Yes	Yes	Yes: urban public transport and road transport	
BE	ABVV-FGTB BTB-UBT	Yes	Yes	Yes	Yes: road section and urban public transport	
BE	ABVV-FGTB ACOD-CGSP	Yes	Yes	Yes	Yes: occasional strikes at the different urban public transport providers to address issues with working conditions and violence against bus drivers	
BE	ACLVB-CGSLB	Yes		Yes	Yes: urban public transport	
BG	FTTU	Yes	Yes	Yes	Yes: sustainable transport groups and in the urban public transport	

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Directly affiliated with the ETF?	Involved in the management bodies of the ETF?	Payment of fees to the ETF for its road transport workers?	Actively involved in the working groups of the ETF?	Affiliated with any other European organisations for its road transport workers?
					management board	
BG	FTW Podkrepa	Yes				
BG	SJB	Yes		Yes	Yes	
DE	Ver.di	Yes	Yes	Yes	Yes	
DE	EVG	Yes	Yes	Yes	Yes: Dirk Schlömer (EVG) is the chair of the ETF's urban public transport committee	
DK	3F	Yes	Yes	Yes	Yes: for example 'storage and logistics', 'campaign and communication' and 'platform workers'	
DK	DJF	Yes	Yes	Yes	Yes (no examples provided by DJF)	
DK	HK Privat	Yes	Yes	Yes		
EE	ETTA	Yes		Yes		
ES	UGT-FeSMC	Yes		Yes	Yes: in social dialogue and transport committees of the ETF	
ES	FSC-CCOO	Yes	Yes	Yes	Yes	
FI	AKT	Yes	Yes	Yes		Yes: NTF
FI	ERTO	On the list, but not confirmed		Yes		Yes: NTF
FI	JHL	On the list, but not confirmed				Yes: NTF
FI	RAU	Yes				Yes: NTF
FR	CFTC Transports	Yes		Yes		
FR	FGTE CFDT	Yes	Yes	Yes	Yes	
FR	FNST CGT	Yes	Yes	Yes	Yes	
FR	FNTL FO-UNCP	Yes		Yes		
HU	KSZOSZ	Yes	Yes	Yes	Yes	
IE	TSSA	Yes		Yes		

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Directly affiliated with the ETF?	Involved in the management bodies of the ETF?	Payment of fees to the ETF for its road transport workers?	Actively involved in the working groups of the ETF?	Affiliated with any other European organisations for its road transport workers?
IE	SIPTU	Yes	Yes	Yes	Yes	ITF, ETUI, IndustriAll Europe
IT	FILT-CGIL	Yes	Yes	Yes	Yes	
IT	FIT-CISL	Yes	Yes	Yes	Yes	
IT	UILTrasporti	Yes	Yes	Yes		
LT	TDF	Yes		Yes		
LT	LKADPSF	Yes		Yes		
LU	Syprolux	Yes	Yes	Yes	Yes: steering committee, public transport section	
LU	OGB-L Road Transport and Navigation Trade Union <sup>29</sup>	Yes		Yes		
LU	LCGB-Transport <sup>30</sup>	Yes		Yes		
MT	GWU	Yes	Yes	Yes	Yes: online meetings and social dialogue	
NL	FNV	Yes	Yes	Yes	Yes (no examples known to respondent)	
NL	CNV	Yes		Yes	Sometimes, but limited	
PL	OPZZ					
RO	SLT	Yes		Yes	Yes: mobility package	
SE	Kommunal	Yes	Yes	Yes	Yes: active in road transport section, urban transport committee and women's committee	Members of the European Federation of Food, Agriculture and Tourism Trade Unions and the European Plan Science Organisation, but not for their urban public transport members
SE	Transport	Yes	Yes	Yes	Yes	
SE	SEKO	Yes	Yes	Yes		
SE	ST	Yes		Yes		They are members of the European

<sup>29</sup> Indirectly through OGB-L.

<sup>30</sup> Indirectly through LCGB.

Member State	Trade union	Directly affiliated with the ETF?	Involved in the management bodies of the ETF?	Payment of fees to the ETF for its road transport workers?	Actively involved in the working groups of the ETF?	Affiliated with any other European organisations for its road transport workers?
						Public Service Union and UNI Europa. They also represent the public sector workers in urban public transport in both of those unions, although they are cross-sectoral unions
SI	ZSSS-SDPZ	Yes		Yes	Yes: training group	
SK	OZ KOVO	Yes		Yes		

**Note:** NTF, Nordic Transport Workers' Federation.

## 3.2. Representativeness of IRU Europe

### 3.2.1. Overview of the representativeness of IRU Europe

As shown in Figure 11, the IRU affiliates 51 employer organisations/business associations in the sector – 46% of all 110 sector employer organisations/business associations – in 26 Member States (there are no IRU members in Cyprus, where there is no employer organisation). A total of 42 IRU members are involved in collective bargaining, which is 51% of all 83 employer organisations involved in collective bargaining in the sector. IRU members conduct sector-related collective bargaining in 25 Member States; this is not the case in Cyprus or Slovakia (in the latter, the IRU member is involved in social dialogue at national level with trade unions and government).

Of the 80 employer organisations/business associations in the sector that are considered representative, 50 IRU affiliates (63%) are considered to be representative in 26 Member States (in Cyprus there is no employer organisation). One IRU member is not considered representative, namely UNIT in France.

**Figure 11: Scoreboard illustrating the representativeness of IRU Europe**

46% of employer organisations/business associations with members in the road transport sector are affiliated with IRU Europe (51/110)	26 Member States have an IRU Europe-affiliated road transport employer organisation/business association	51% of employer organisations involved in sector-related collective bargaining are affiliated with IRU Europe (42/83)	In 25 Member States, IRU Europe has a member involved in collective bargaining at either sectoral or company level
	AT ES LV		AT ES LV
	BE FI MT		BE FI MT

	BG	FR	NL		BG	FR	NL
	CY	HR	PL		CY	HR	PL
	CZ	HU	PT		CZ	HU	PT
	DE	IE	RO		DE	IE	RO
	DK	IT	SE		DK	IT	SE
	EE	LT	SI		EE	LT	SI
	EL	LU	SK		EL	LU	SK
	Urban public transport		Rest of road transport	Whole road transport	Source		
Total number of member companies of employer organisations affiliated with the IRU	43,223		194,437	237,660	Table 35		
Total number of member companies of all employer organisations in the sector	62,768		238,065	300,833	Table 18		
Total number of companies in the sector	284,472		548,774	846,802 <sup>31</sup>	Table 3		
Proportion of all employer organisation members, %	68.86%		81.67%	79.00%			
Proportion of all companies in the sector, %	15.19%		35.43%	28.07%			
Member States where all sectoral employer organisation are affiliated with the IRU (five employer organisations)	3: BG (2), EL (2), RO (1)						
Member States where some, but not all, employer organisations are affiliated with the IRU (45 affiliated/57 not affiliated; see Table 18 in Section 2.3)	23: AT (3/5), BE (3/8), CZ (1/2), DE (4/7), DK (4/6), EE (1/2), ES (4/7), FI (1/6), FR (4/12), HR (1/2), HU (1/4), IE (1/2), IT (3/5), LT (1/3), LU (2/3), LV (1/2), MT (1/3), NL (2/4), PL (1/4), PT (2/4), SE (2/4), SI (1/4), SK (1/3)						
Member States where the largest sectoral employer organisation/business association is affiliated with the IRU	26: all except CY, where the IRU has no member						

In three Member States, all of the national sectoral employer organisations/business associations are affiliated with the IRU: Bulgaria, Greece and Romania. In the remaining 23 Member States with IRU members, not all sector employer organisations/business associations are affiliated with the IRU (noting that no employer organisation exists in Cyprus). In the 26 Member States where at least one sector employer organisation/business association is affiliated with the IRU, IRU members are the largest or second largest sector employer organisation/business association in most Member States.

<sup>31</sup> The sub-totals in the previous two columns add to less than 846,802 companies due to some companies classified in several categories.

The country profiles in Annex 1 provide further details about the membership strength of IRU members in the Member States.

Table 32 summarises the sector-relatedness and the extent of overlap of IRU affiliates in the different parts of the sector.

First, the analysis of the sector-relatedness of IRU affiliates is undertaken from the perspective of the affiliates organising members in both urban public transport and the rest of road transport (the whole road transport sector), those organising members in urban public transport only and those organising members in the rest of road transport only. This reveals that 22 of the 51 IRU affiliates are organising members in the rest of road transport only. There are 23 IRU affiliates that overlap, organising members in both urban public transport and the rest of road transport. Six IRU affiliates organise members in urban public transport only.

**Table 32: General sector-relatedness and overlap of IRU affiliates**

Entire road transport ESSDC	Urban public transport working group	Rest of road transport working group	Detailed analyses	
51/110 employer organisations affiliated with the IRU (46%)	29/64 employer organisations (45%) (23/29 = 79% overlap)		6/36 employer organisations covering urban public transport only (NACE 49.31, 49.32) (17%) 6 Member States	12% of all IRU affiliates
		46/74 employer organisations (62%) (23/46 = 50% overlap)	23/28 employer organisations covering both urban public transport and the rest of road transport (whole road transport sector) (82%) 21 Member States	45% of all IRU affiliates
		22/46 employer organisations covering the rest of road transport only (NACE 49.39, 49.41, 49.92) (48%) 17 Member States	43% of all IRU affiliates	

**Note:** See Table 33 for further analysis.

**Source:** Network of Eurofound Correspondents

Table 33 sets out a detailed overview of IRU affiliates' membership in the five different segments of the road transport sector.



Table 33: Detailed sector-relatedness and overlap of IRU affiliates

Segments in the sector	Affiliated employer organisations organising members	Number of Member States with an affiliated employer organisation/number of Member States with an employer organisation	Member States with employer organisations but not affiliated with the IRU
NACE 49.31: Urban and suburban passenger land transport	21 IRU affiliates 43% of all 49 employer organisations organising in this activity	15/24	9: EE, EL, FR, IE, LT, LV, MT, PL, SK
NACE 49.32: Taxi operation	27 IRU affiliates 60% of all 45 employer organisations organising in this activity	18/24	6: IE, LT, LV, MT, RO, SI
NACE 49.39: Other passenger land transport	26 IRU affiliates 48% of all 54 employer organisations organising in this activity	19/26	7: EE, FR, LV, MT, PT, RO, SK
NACE 49.41: Freight transport by road	36 IRU affiliates 55% of all 66 employer organisations organising in this activity	24/26	2: SE, SK
NACE 49.92: Removal services	20 IRU affiliates 57% of all 35 employer organisations organising in this activity	16/20	4: AT, BE, PL, SK

**Note:** See Table 34 for full analysis.

**Source:** Network of Eurofound Correspondents

### 3.2.2. Sector-relatedness of IRU Europe affiliates

In this section, we present the analysis of the sector-relatedness of IRU affiliates, first from the perspective of the affiliates organising members in both urban public transport and the rest of road transport (the whole road transport sector), in urban public transport only and in the rest of road transport only. This is then followed by the detailed analysis of IRU affiliates' membership in the five different segments of the road transport sector.

As shown in Table 34, 23 of the 51 IRU affiliates have overlap, organising members across the whole road transport sector (in both urban public transport and the rest of road transport), in 21 Member States. Twenty-two IRU affiliates organise members in the rest of road transport only in 24 Member States. Six IRU affiliates in 17 Member States organise members in urban public transport activities only.

Table 34: General sector-relatedness of IRU affiliates in the sector

Member State	Employer organisation	Organises companies in the following sectors?		
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Only urban public transport activities (NACE 49.31, 49.32)	Only rest of road transport (NACE 49.39, 49.41, 49.92)
<b>Total</b>	<b>110</b>	<b>28</b>	<b>36</b>	<b>46</b>
<b>Number of Member States with an employer organisation</b>		<b>21</b>	<b>17</b>	<b>24</b>
<b>Number of IRU-affiliated employer organisations organising this activity</b>		<b>23</b>	<b>6</b>	<b>22</b>
<b>Proportion of IRU-affiliated employer organisations in this activity, %</b>		<b>82</b>	<b>17</b>	<b>48</b>
<b>Number of Member States with an IRU-affiliated employer organisation</b>		<b>21</b>	<b>6</b>	<b>17</b>
AT	FVALS (whole road transport)	Yes		
AT	FVGB (rest of road transport)			Yes
AT	FVBG (urban public transport)		Yes	
BE	FBAA	Yes		
BE	Febetra			Yes
BE	GTL Taxi		Yes	
BG	Aebtri			Yes
BG	CBRH	Yes		
CZ	Česmad Bohemia	Yes		
DE	BDO	Yes		
DE	DSLVL			Yes
DE	BGL			Yes
DE	BVTM		Yes	
DK	DPT (whole road transport, including taxis)	Yes		
DK	DI (whole road transport)	Yes		
DK	ITD (rest of road transport)			Yes
DK	DTL (rest of road transport)			Yes
EE	ERAA	Yes		
EL	Ποσειδά		Yes	
EL	OFAE	Yes		
ES	Confibus (whole road transport)	Yes		
ES	ASTIC (rest of road transport)			Yes
ES	Anetra (urban public transport)		Yes	
ES	CETM (rest of road transport)			Yes
FI	SKAL (rest of road transport)			Yes
FR	UNIT (urban public transport)		Yes	
FR	FNTR (rest of road transport)			Yes
FR	FNTV (whole road transport)	Yes		
FR	AFTRI (rest of road transport)			Yes

Member State	Employer organisation	Organises companies in the following sectors?		
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Only urban public transport activities (NACE 49.31, 49.32)	Only rest of road transport (NACE 49.39, 49.41, 49.92)
HR	HGK	Yes		
HU	MKFE (whole road transport)	Yes		
IE	IRHA			Yes
IT	ANAV (whole road transport)	Yes		
IT	Fiapautotransporti (rest of road transport)			Yes
IT	Confetra (rest of road transport)			Yes
LT	Linava	Yes		
LU	FLEAA	Yes		
LU	GT (rest of road transport)			Yes
LV	Latvijas auto	Yes		
MT	ATTO			Yes
NL	KNV (whole road transport)	Yes		
NL	TLN (rest of road transport)			Yes
NL	Evofenedex (rest of road transport)			Yes
PL	ZMPD			Yes
PT	Antram (rest of road transport)			Yes
PT	Antrop	Yes		
RO	UNTRR	Yes		
SE	SBF (whole road transport)	Yes		
SE	BA (whole road transport)	Yes		
SI	GIZ Intertransport			Yes
SK	Česmad (rest of road transport)	Yes		

Source: Network of Eurofound Correspondents, 2022

Table 35 shows the sector-relatedness of the IRU members with respect to the different segments of the road transport sector in which the IRU members organise companies. In total, five such segments were identified in the study, and the extent of IRU members representing companies in each segment is analysed below.

In **urban and suburban transport (NACE 49.31)**, 21 IRU members in 15 Member States organise such companies. This represents 43% of all of the employer organisations organising companies in this segment of the sector, in 15 out of the 24 Member States in which employer organisations are organising companies in this activity.

In 12 Member States, the IRU affiliates some but not all of the employer organisations organising companies in urban and suburban transport. In all 12 Member States, IRU affiliates organising companies in urban and suburban transport are the largest or second largest employer organisation in the sector.

In three Member States, there are employer organisations organising companies in urban and suburban transport but none is affiliated with the IRU: Croatia, Poland and Slovenia.

In **taxi operations (NACE 49.32)**, 27 IRU members in 18 Member States organise such companies. This represents 60% of all of the employer organisations organising companies in this segment of the sector, in 18 of the 24 Member States in which employer organisations are organising companies in this activity.

In two Member States, the IRU affiliates all of the employer organisations organising companies in taxi operations: Bulgaria and Greece. In 14 Member States, the IRU affiliates some but not all of the employer organisations organising companies in taxi operations. In all 14 Member States, IRU affiliates organising companies in taxi operations are the largest or second largest employer organisation in the sector.

In three Member States, there are employer organisations organising companies in taxi operations but none is affiliated with the IRU: Croatia, Poland and Slovenia.

In **passenger road transport (NACE 49.39) activities**, 26 IRU members in 19 Member States organise such companies. This represents 48% of all of the employer organisations organising companies in this activity, in 19 of the 26 Member States where employer organisations are organising companies in this activity.

In 17 Member States, the IRU affiliates some but not all of the employer organisations organising companies in passenger road transport activities (in 2 Member States, IRU affiliates all employer organisations). In 13 of these Member States, IRU affiliates organising companies in passenger road transport activities are the largest or second largest employer organisation in the sector. The exception to this is IRU affiliates in Germany (although here no membership data are available) and the Netherlands, which appear to be smaller employer organisations in the sector.

In **freight road transport (NACE 49.41) activities**, 36 IRU members in 24 Member States organise such companies. This represents 55% of all of the employer organisations organising companies in this activity, in 24 of the 26 Member States in which employer organisations are organising companies in this activity.

In three Member States, the IRU affiliates all of the employer organisations organising companies in freight road transport activities: Bulgaria, Greece and Romania. In 21 Member States, the IRU affiliates some but not all of the employer organisations organising companies in freight road transport activities. In 19 of these Member States, IRU affiliates organising companies in freight road transport activities are the largest or second largest employer organisation in the sector. The exception to this is the IRU affiliate in the Netherlands, which appears to be a smaller employer organisation in the sector.

In two Member States, there are employer organisations organising companies in freight road activities but none is affiliated with the IRU: Poland and Slovenia.

In **removal services (NACE 49.92)**, 20 IRU members in 16 Member States organise such companies. This represents 57% of all of the employer organisation organising the companies in this activity, in 16 of the 20 Member States where employer organisations are organising companies in this activity.

In 10 Member States, the IRU affiliates some but not all of the employer organisations organising companies in removal services (in six Member States IRU affiliates all relevant employer organisations). In nine of these Member States, IRU affiliates organising companies in removal services are the largest

or second largest employer organisation in the sector. The exception to this is the IRU affiliate in the Netherlands, which appears to be the smallest employer organisation in the sector.

In four Member States, there are employer organisations organising companies in removal services but none is affiliated with the IRU: Bulgaria, Croatia, Poland and Slovenia.

Table 35: General sector-relatedness of IRU member employer organisations in the five segments of the road transport sector

Member State	Employer organisation/ business association	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members of rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in rest of road transport (NACE 49.39, 49.41, 49.92)	Organises companies in the following sectors?					Affiliated with the IRU?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
<b>Total number</b>						49	45	54	66	35	
<b>Number of Member States</b>						24	24	26	26	20	
<b>Number of IRU-affiliated employer organisations</b>		43,223		194,437		21	27	26	36	20	51
<b>Proportion of all employer organisations in this segment, %</b>						43	60	48	55	57	
<b>Number of Member States with IRU-affiliated employer organisations</b>						15	18	19	24	16	26
AT	FVALS (whole road transport)	240	2	1,020	2	Yes	Yes	Yes	Yes		Yes
AT	FVGB (rest of road transport)	No members		9,306	1				Yes		Yes
AT	FVBG (urban public transport)	6,418	1				Yes	Yes			Yes
BE	FBAA	88		235		Yes	Yes	Yes	Yes		Yes
BE	Febetra			1,800	1		Yes	Yes	Yes		Yes
BE	GTL TAXi	2,623 <sup>32</sup>		No members			Yes				Yes
BG	Aebtri	No data		870	1	Yes		Yes	Yes		Yes

<sup>32</sup> According to GTL TAXi, this is the number of taxi/private-hire-vehicle companies (that is, the companies using drivers under an employment contract). The employment figure for Belgium (8,209) represents the number of employees under an employment contract (self-employed drivers are not included).

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members of rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in rest of road transport (NACE 49.39, 49.41, 49.92)	Organises companies in the following sectors?					Affiliated with the IRU?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
BG	CBRH			396	2	Yes	Yes	Yes	Yes	Yes	Yes
CZ	Česmad Bohemia	8	1	2,026	1	Yes	Yes	Yes	Yes	Yes	Yes
DE	BDO	1,592	1–2	2,454	2	Yes		Yes			Yes
DE	DSLIV	No members		No data					Yes	Yes	Yes
DE	BGL	No members		7,000	1				Yes	Yes	Yes
DE	BVTM	12,000	1–2	No members			Yes				Yes
DK	DPT (whole road transport)	1,700		140		Yes		Yes			Yes
DK	DI (whole road transport)	76		549	2			Yes	Yes	Yes	Yes
DK	ITD (rest of road transport)	No members		700	2			Yes	Yes	Yes	Yes
DK	DTL (rest of road transport)	No members		1,422	1		Yes		Yes	Yes	Yes
EE	ERAA	No data provided		250	1				Yes		Yes
EL	Πορείατα	120	1	No members			Yes				Yes
EL	OFAE	No data		22	1			Yes	Yes		Yes
ES	Confibus (whole road transport)	1,000	1	95,000	1	Yes	Yes	Yes	Yes	Yes	Yes

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members of rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in rest of road transport (NACE 49.39, 49.41, 49.92)	Organises companies in the following sectors?					Affiliated with the IRU?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
ES	ASTIC (rest of road transport)	No data		196 direct members and around 7,000 companies through province-level association		Yes	Yes	Yes	Yes	Yes	Yes
ES	Aetra (urban public transport)	No data		No data					Yes		Yes
ES	CETM (rest of road transport)	No members		31,000	2	Yes			Yes		Yes
FI	SKAL (rest of road transport)	No members		4,100	1	Yes	Yes	Yes	Yes	Yes	Yes
FR	UNIT (urban public transport)	164		No members					Yes		Yes
FR	FNTR (rest of road transport)	No members		5,300			Yes			Yes	Yes
FR	FNTV (whole road transport)	No data		5,291	1		Yes				Yes
FR	AFTRI (rest of road transport)	No members		150			Yes				Yes
HU	MKFE (whole road transport)	127	1	2,500	2	Yes	Yes	Yes	Yes	Yes	Yes
HR	HGK (whole road transport)	No data				Yes	Yes	Yes	Yes	Yes	Yes
IE	IRHA	No members		1,000	1			Yes	Yes		Yes



## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members of rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in rest of road transport (NACE 49.39, 49.41, 49.92)	Organises companies in the following sectors?					Affiliated with the IRU?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
IT	ANAV (whole road transport)	600	1	2,000	1–2	Yes	Yes	Yes	Yes	Yes	Yes
IT	Fiapautotransporti (rest of road transport)	No members		No data					Yes		Yes
IT	Confetra (rest of road transport)	No members		No data					Yes		Yes
LT	Linava	27	1	27	1			Yes	Yes		Yes
LU	FLEAA (urban public transport)	25	2	25	2	Yes	Yes	Yes	Yes	Yes	Yes
LU	GT (rest of road transport)	No members		170	1		Yes				Yes
LV	Latvijas auto	No data		395	1						Yes
MT	ATTO	13		6					Yes		Yes
NL	KNV (whole road transport)	168	1	148		Yes	Yes	Yes	Yes	Yes	Yes
NL	TLN (rest of road transport)	No members		4,700	2	Yes					Yes
NL	Evofenedex (rest of road transport)	No members		10,000	1	Yes					Yes
PL	ZMPD	No members		2,817				Yes	Yes	Yes	Yes
PT	Antram (rest of road transport)	No members		1,647	1–2		Yes		Yes		Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Number of members in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members of rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in rest of road transport (NACE 49.39, 49.41, 49.92)	Organises companies in the following sectors?					Affiliated with the IRU?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)	
PT	Antrop (whole road transport)	No data		No data		Yes	Yes		Yes	Yes	Yes
RO	UNTRR (whole road transport)	Over 16,000 (whole road transport)							Yes		Yes
SE	SBF (whole road transport)	259	249	10		Yes	Yes	Yes		Yes	Yes
SE	BA (whole road transport)	No data	1–2	No data provided	1–2	Yes	Yes	Yes			Yes
SK	Česmad (whole road transport)	No data		No data provided	1		Yes				Yes
SI	GIZ Intertransport	No members		No data				Yes	Yes	Yes	Yes

Table 36 provides an overview of the sector-relatedness of the IRU affiliates for the detailed categories of urban public transport activities.

Table 36: Specific sector-relatedness of IRU member employer organisation for the detailed categories of urban public transport activities

Member State	Employer organisation/business association	Covers the following types of urban public transport?										Covers operators in the following categories?				
		Urban and suburban transport (NACE 49.31)	Taxi operations (NACE 49.32)	Ride handling (NACE 49.32)	Bus	Light rail	Metro	Local/regional rail	Trolley bus	Water-borne urban public transport	Shared bikes/scooters	Capital city	Second largest city	Third largest city	Rural areas	Subcontracted providers of urban public transport
<b>Number of IRU-affiliated employer organisations organising this activity</b>		26	15	11	35	6	7	8	10	5	7	25	24	22	23	16
<b>Proportion of all IRU-affiliated employer organisations, %</b>		51%	29%	22%	69%	12%	14%	16%	20%	10%	14%	49%	47%	43%	45%	31%
<b>Number of Member States with an IRU-affiliated employer organisation</b>		6	11	9	15	5	4	5	5	3	5	15	14	14	14	8
AT	FVALS	Yes			Yes							Yes	Yes	Yes	Yes	Yes
AT	FVBG		Yes	Yes								Yes	Yes	Yes	Yes	Yes
BE	FBAA	Yes		Yes	Yes							Yes	Yes	Yes	Yes	
BE	GTL TAXi		Yes	Yes												
CZ	Česmad Bohemia	Yes			Yes							Yes	Yes		Yes	Yes
DE	BDO	Yes			Yes							Yes	Yes		Yes	Yes
DE	BVTM	Yes	Yes							Yes	Yes	Yes	Yes	Yes	Yes	Yes
DK	DPT	Yes	Yes	Yes	Yes							Yes	Yes	Yes	Yes	Yes
DK	DI	Yes	Yes	Yes	Yes							Yes	Yes	Yes	Yes	Yes
DK	DE	Yes	Yes		Yes							Yes	Yes	Yes	Yes	

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/business association	Covers the following types of urban public transport?										Covers operators in the following categories?				
		Urban and suburban transport (NACE 49.31)	Taxi operations (NACE 49.32)	Ride handling (NACE 49.32)	Bus	Light rail	Metro	Local/regional rail	Trolley bus	Water-borne urban public transport	Shared bikes/scooters	Capital city	Second largest city	Third largest city	Rural areas	Subcontracted providers of urban public transport
EL	Ποιειαα		Yes									Yes	Yes	Yes	Yes	
ES	Confibus	Yes			Yes							Yes	Yes	Yes	Yes	
ES	Anetra	Yes														
ES	ASTIC	Yes														
ES	CETM			Yes												
FR	UNIT		Yes													
HR	HGK	Yes	Yes	Yes												
HU	MKFE	Yes			Yes							Yes	Yes	Yes		
IT	ANAV <sup>33</sup>	Yes		Yes	Yes							Yes	Yes	Yes	Yes	Yes
LT	Linava	Yes			Yes				Yes			Yes	Yes	Yes	Yes	
LU	FLEAA	Yes			Yes							Yes	Yes	Yes	Yes	Yes
LV	Latvijas auto															
NL	KNV		Yes	Yes							Yes					

<sup>33</sup> ANAV is an employer organisation representing private bus and coach transport companies (about 600 companies) that carry out local public transport services, occasional and touristic services, and regular services, both nationally and internationally.

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/business association	Covers the following types of urban public transport?										Covers operators in the following categories?				
		Urban and suburban transport (NACE 49.31)	Taxi operations (NACE 49.32)	Ride handling (NACE 49.32)	Bus	Light rail	Metro	Local/regional rail	Trolley bus	Water-borne urban public transport	Shared bikes/scooters	Capital city	Second largest city	Third largest city	Rural areas	Subcontracted providers of urban public transport
PT	Antrop	Yes			Yes							Yes				
PT	Antral		Yes									Yes	Yes	Yes	Yes	Yes
RO	UNTRR	Yes			Yes											
SE	SBF	Yes			Yes				Yes			Yes	Yes	Yes	Yes	Yes
SE	BA		Yes	Yes								Yes	Yes	Yes	Yes	Yes

Source: Network of Eurofound Correspondents

Table 37 provides an overview of the sector-relatedness of the IRU affiliates for the detailed categories of the rest of road transport.

Table 37: Specific sector-relatedness of IRU member employer organisations for the detailed categories of the rest of road transport

Member State	Employer organisation/business association	Covers the following national activities?					Covers the following cross-border activities?				
		Passenger road transport by bus (NACE 49.39)	Passenger road transport by car/taxi (NACE 49.32) <sup>34</sup>	Freight transport by trucks >3.5 tonnes (NACE 49.41)	Freight transport by vans <3.5 tonnes (NACE 49.41)	Removal services (NACE 49.92)	Passenger road transport by bus (NACE 49.39)	Passenger road transport by car/taxi (NACE 49.32)	Freight transport by trucks >3.5 tonnes (NACE 49.41)	Freight transport by vans <3.5 tonnes (NACE 49.41)	Removal services (NACE 49.92)
<b>Number of IRU-affiliated employer organisations organising this activity</b>		24	14	34	30	19	23	9	31	26	16
<b>Proportion of all IRU-affiliated employer organisations, %</b>		47	27	67	59	37	45	18	61	51	31
<b>Number of Member States with an IRU-affiliated employer organisation</b>		18	9	22	21	11	18	7	21	20	11
AT	FVALS	Yes	Yes				Yes	Yes			
AT	FVBG	Yes	Yes				Yes	Yes			
BE	FBAA	Yes					Yes				
BE	Febetra		Yes	Yes	Yes			Yes	Yes	Yes	
BG	Aebtri	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	
BG	CBRH	Yes		Yes	Yes		Yes		Yes	Yes	
CZ	Česmad Bohemia	Yes		Yes	Yes	Yes	Yes		Yes	Yes	Yes
DE	DSLVL			Yes	Yes				Yes	Yes	

<sup>34</sup> This category is included here to provide further details in the data on IRU affiliates.

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/business association	Covers the following national activities?					Covers the following cross-border activities?				
		Passenger road transport by bus (NACE 49.39)	Passenger road transport by car/taxi (NACE 49.32) <sup>34</sup>	Freight transport by trucks >3.5 tonnes (NACE 49.41)	Freight transport by vans <3.5 tonnes (NACE 49.41)	Removal services (NACE 49.92)	Passenger road transport by bus (NACE 49.39)	Passenger road transport by car/taxi (NACE 49.32)	Freight transport by trucks >3.5 tonnes (NACE 49.41)	Freight transport by vans <3.5 tonnes (NACE 49.41)	Removal services (NACE 49.92)
DE	BDO	Yes	Yes	Yes	Yes		Yes				
DE	BGL			Yes	Yes	Yes			Yes	Yes	
DK	ITD			Yes		Yes			Yes	Yes	
DK	DI	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
DK	DTL			Yes	Yes	Yes			Yes	Yes	
DK	DPT	Yes	Yes				Yes	Yes			
EE	ERAA			Yes			Yes		Yes		
EL	OFAE	Yes		Yes			Yes		Yes		
ES	CETM			Yes	Yes	Yes			Yes	Yes	
ES	Confibus	Yes					Yes				
ES	ASTIC	Yes		Yes		Yes	Yes		Yes	Yes	
FI	SKAL			Yes	Yes	Yes			Yes	Yes	
FR	FNTR	Yes		Yes	Yes	Yes	Yes		Yes	Yes	
FR	FNTV	Yes	Yes				Yes	Yes			
FR	AFTRI	Yes		Yes	Yes	Yes	Yes		Yes	Yes	
HR	HGK	Yes	Yes	Yes	Yes	Yes					

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/business association	Covers the following national activities?					Covers the following cross-border activities?				
		Passenger road transport by bus (NACE 49.39)	Passenger road transport by car/taxi (NACE 49.32) <sup>34</sup>	Freight transport by trucks >3.5 tonnes (NACE 49.41)	Freight transport by vans <3.5 tonnes (NACE 49.41)	Removal services (NACE 49.92)	Passenger road transport by bus (NACE 49.39)	Passenger road transport by car/taxi (NACE 49.32)	Freight transport by trucks >3.5 tonnes (NACE 49.41)	Freight transport by vans <3.5 tonnes (NACE 49.41)	Removal services (NACE 49.92)
HU	MKFE	Yes		Yes	Yes	Yes	Yes		Yes	Yes	Yes
IT	ANAV	Yes	Yes				Yes	Yes			
IT	Fiapautotransporti			Yes	Yes	Yes			Yes	Yes	Yes
IT	Confetra			Yes	Yes	Yes			Yes	Yes	Yes
LT	Linava	Yes		Yes	Yes		Yes		Yes	Yes	
LU	GT			Yes	Yes	Yes			Yes	Yes	Yes
LV	Latvijas auto	Yes		Yes	Yes	Yes	Yes		Yes	Yes	
MT	ATTO			Yes	Yes				Yes	Yes	
NL	TLN			Yes	Yes	Yes			Yes	Yes	Yes
NL	Evofenedex			Yes	Yes				Yes	Yes	
NL	KNV	Yes	Yes				Yes				
PL	ZMPD			Yes	Yes				Yes	Yes	
PT	Antram			Yes	Yes				Yes	Yes	
RO	UNTRR	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	
SE	BA		Yes	Yes	Yes			Yes	Yes	Yes	Yes
SE	SBF	Yes					Yes				



Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/business association	Covers the following national activities?					Covers the following cross-border activities?				
		Passenger road transport by bus (NACE 49.39)	Passenger road transport by car/taxi (NACE 49.32) <sup>34</sup>	Freight transport by trucks >3.5 tonnes (NACE 49.41)	Freight transport by vans <3.5 tonnes (NACE 49.41)	Removal services (NACE 49.92)	Passenger road transport by bus (NACE 49.39)	Passenger road transport by car/taxi (NACE 49.32)	Freight transport by trucks >3.5 tonnes (NACE 49.41)	Freight transport by vans <3.5 tonnes (NACE 49.41)	Removal services (NACE 49.92)
SI	GIZ Intertransport	Yes	Yes	Yes	Yes						
SK	Česmad										

Source: Network of Eurofound Correspondents

### 3.2.3. IRU Europe members in the industrial relations landscape in the sector at national and EU levels

Table 38 sets out the position in the industrial relations landscape and collective bargaining processes of the IRU affiliates in 26 Member States (there are no IRU members in Cyprus, where there is no employer organisation). Forty-two IRU members are involved in collective bargaining – that is, 51% of all employer organisations involved in collective bargaining in the sector. IRU members conduct sector-related collective bargaining in 24 Member States, except in Finland and Slovakia.

Of the 80 employer organisations/business associations in the sector that are considered representative, 50 IRU affiliates (63%) are considered to be representative in 26 Member States (noting the situation in Cyprus, where there is no employer organisation). There is one IRU that is not considered representative, namely UNIT in France.

Thirty-eight IRU members are involved in social dialogue activities and 44 are consulted by the government on sector-related matters.

**Table 38: IRU Europe members in the industrial relations landscape in the sector in their country**

Member State	Employer organisation/ business association	Recognised as representative at national level?	Involved in collective bargaining in the sector (either sectoral or company level)?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	IRU member?
<b>Total</b>	<b>110</b>	<b>80</b>	<b>83</b>	<b>77</b>	<b>96</b>	
<b>Number of Member States with an employer organisation</b>		<b>26</b>	<b>26</b>	<b>26</b>	<b>26</b>	
<b>Number of IRU-affiliated employer organisations organising this activity</b>		<b>50</b>	<b>42</b>	<b>38</b>	<b>44</b>	<b>51</b>
<b>Proportion of all IRU-affiliated employer organisations in this category, %</b>		<b>63</b>	<b>51</b>	<b>49</b>	<b>46</b>	
<b>Number of Member States with an IRU-affiliated employer organisation</b>		<b>26</b>	<b>24</b>	<b>21</b>	<b>26</b>	<b>26</b>
AT	FVALS	Yes	Yes	Yes	Yes	Yes
AT	FVGB	Yes	Yes	Yes	Yes	Yes
AT	FVBG	Yes	Yes	Yes	Yes	Yes
BE	FBAA	Yes	Yes	Yes	Yes	Yes
BE	Febetra	Yes	Yes		Yes	Yes
BE	GTL TAXI	Yes	Yes		Yes	Yes
BG	Aebtri	Yes		Yes	Yes	Yes
BG	CBRH	Yes	Yes	Yes	Yes	Yes
CZ	Česmad Bohemia	Yes	Yes	Yes	Yes	Yes
DE	BDO	Yes	Yes		Yes	Yes
DE	DSLVS	Yes		Yes		Yes
DE	BVTM	Yes	Yes	Yes		Yes
DK	DPT	Yes		Yes	Yes	Yes
DK	DI	Yes	Yes		Yes	Yes
DK	DE	Yes		Yes	Yes	Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Recognised as representative at national level?	Involved in collective bargaining in the sector (either sectoral or company level)?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	IRU member?
DK	ITD	Yes	Yes	Yes	Yes	Yes
EE	ERAA	Yes	Yes	Yes		Yes
EL	OFAE	Yes	Yes	Yes	Yes	Yes
EL	Πορεία	Yes	Yes		Yes	Yes
ES	Confibus	Yes		Yes	Yes	Yes
ES	Anetra	Yes	Yes		Yes	Yes
ES	ASTIC	Yes	Yes	Yes	Yes	Yes
ES	CETM	Yes	Yes		Yes	Yes
FI	SKAL	Yes		Yes		Yes
FR	FNTR	Yes			Yes	Yes
FR	AFTRI	Yes	Yes		Yes	Yes
FR	UTP	Yes	Yes	Yes	Yes	Yes
FR	UNIT		Yes		Yes	Yes
HR	HGK	Yes	Yes	Yes	Yes	Yes
HU	MKFE	Yes	Yes		Yes	Yes
IE	IRHA	Yes	Yes	Yes	Yes	Yes
IT	ANAV	Yes	Yes	Yes	Yes	Yes
IT	Fiapautotransporti	Yes	Yes	Yes	Yes	Yes
IT	Confetra	Yes	Yes	Yes	Yes	Yes
LT	Linava	Yes	Yes	Yes		Yes
LU	GT	Yes	Yes	Yes	Yes	Yes
LU	FLEAA	Yes	Yes	Yes		Yes
LV	Latvijas auto	Yes	Yes	Yes	Yes	Yes
MT	ATTO	Yes	Yes	Yes		Yes
NL	KNV	Yes	Yes	Yes	Yes	Yes
NL	TLN	Yes			Yes	Yes
NL	Evofenedex	Yes	Yes	Yes	Yes	Yes
PL	ZMPD	Yes	Yes	Yes	Yes	Yes
PT	Antram	Yes	Yes	Yes	Yes	Yes
PT	Antrop	Yes	Yes	Yes	Yes	Yes
RO	UNTRR	Yes	Yes	Yes	Yes	Yes
SE	SBF	Yes	Yes	Yes	Yes	Yes
SE	BA	Yes	Yes		Yes	Yes
SI	GIZ Intertransport	Yes	Yes	Yes	Yes	Yes
SK	Česmad	Yes		Yes	Yes	Yes

Source: Network of Eurofound Correspondents

Table 39 shows the involvement of the IRU affiliates in the IRU internal structures. All 51 members are directly affiliated with the IRU. Forty members are involved in the management bodies of the IRU, 45 members are involved in the different working groups of the IRU and 45 members pay the IRU the fees for their road transport members.

Table 39: Involvement of IRU member employer organisations in the IRU internal structures and affiliation with other European organisations

Member State	Employer organisation/ business association	Directly affiliated with the IRU for its road transport members?	Involved in the decision-making structures/ management bodies of the IRU?	Payment of fees to the IRU for its road transport members?	Actively involved in the working groups of the IRU?	Actively involved in the ESSDC for road transport on behalf of the IRU?	Indirect membership of, link to or cooperation with the IRU?	Affiliated with any other European organisations for its road transport members?
<b>Number of IRU affiliates</b>		<b>51</b>	<b>40</b>	<b>45</b>	<b>45</b>	<b>37</b>	<b>0</b>	<b>13</b>
<b>Number of Member States</b>		<b>26</b>	<b>23</b>	<b>25</b>	<b>25</b>	<b>18</b>		<b>8</b>
AT	FVALS	Yes	Yes	Yes	Yes	Yes		
AT	FVBG	Yes	Yes	Yes	Yes	Yes		
AT	FVGB	Yes	Yes	Yes	Yes	Yes		
BE	FBAA	Yes	Yes	Yes	Yes	Yes		UITP
BE	Febetra	Yes		Yes	Yes	Yes		
BE	GTL Taxi	Yes						
BG	Aebtri	Yes	Yes	Yes	Yes, Aebtri is actively involved in all meetings of the IRU working groups, including consultation, preparation of opinions, decisions, etc.	Yes		
BG	CBRH	Yes		Yes	Yes, within CAS and the Expert Group on Enforcement			
CZ	Česmad Bohemia	Yes	Yes	Yes	Yes	Yes		
DE	DSLVL	Yes, as an associated member	Yes, as an associated member. DSLVL has hearing and speaking rights but no right to take part in voting for decisions	Yes	Yes, such as CAS			Clecat
DE	BDO	Yes	Yes	Yes	Yes: CTP and CAS, among others	Yes		

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Directly affiliated with the IRU for its road transport members?	Involved in the decision-making structures/ management bodies of the IRU?	Payment of fees to the IRU for its road transport members?	Actively involved in the working groups of the IRU?	Actively involved in the ESSDC for road transport on behalf of the IRU?	Indirect membership of, link to or cooperation with the IRU?	Affiliated with any other European organisations for its road transport members?
DE	BVTM	Yes	Yes	Yes	Yes	Yes		
DK	ITD	Yes		Yes	Yes			Yes: Fit for 55, CAS
DK	DTL	Yes	Yes	Yes	Yes	Yes		CORTE
DK	DI	Yes		Yes	Yes	Yes	Yes	The main European membership of DI is BusinessEurope
DK	DPT	Yes	Yes	Yes	Yes	Yes,		
EE	ERAA	Yes	Yes	Yes	Yes.	Yes		
EL	OFAE	Yes	Yes	Yes	Yes	Yes		Yes: United Nations Economic Commission for Europe Working Party on Customs Questions affecting Transport (WP.30), Transfrigoroute International, Balkan Transport Forum (inactive now)
EL	Ποσειδά	Yes	Yes	Yes	Yes			
ES	CETM	Yes		Yes	Yes	Yes		
ES	Confibus	Yes	Yes	Yes	Yes	Yes		
ES	ASTIC	Yes	Yes	Yes	Yes	Yes		
ES	Anetra	Yes						
FI	SKAL	Yes	Yes	Yes	Yes	Yes		
FR	FNTR	Yes	Yes	Yes	Yes	Yes, the FNTR's General Delegate chaired the sectoral dialogue committee for roads for 2020–2021. She is currently the Vice-Chair		

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Directly affiliated with the IRU for its road transport members?	Involved in the decision-making structures/ management bodies of the IRU?	Payment of fees to the IRU for its road transport members?	Actively involved in the working groups of the IRU?	Actively involved in the ESSDC for road transport on behalf of the IRU?	Indirect membership of, link to or cooperation with the IRU?	Affiliated with any other European organisations for its road transport members?
FR	FNTV	Yes	Yes	Yes	Yes	Yes		
FR	AFTRI	Yes	Yes	Yes	Yes	Yes		
FR	UNIT	Yes	Yes, UNIT is Vice President of the taxi group	Yes	Yes: IRU Taxi Group			
HR	HGK	Yes						
HU	MKFE	Yes	Yes	Yes	Yes:	Yes		
IE	IRHA	Yes						
IT	ANAV	Yes	Yes	Yes	Yes	Yes		Yes: UITP
IT	Fiapauto- transporti	Yes	Yes	Yes	Yes	Yes		
IT	Confetra	Yes	Yes	Yes	Yes	Yes		
LT	Linava	Yes	Yes	Yes	Yes	Yes		
LU	GT	Yes	Yes	Yes	Yes: mobility package, driver shortage, etc.	Yes		
LU	FLEAA	Yes	Yes	Yes	Yes	Yes		
LV	Latvijas auto	Yes	Yes	Yes	Yes	Yes		
MT	ATTO	Yes	Yes	Yes	Yes	Yes		
NL	TLN	Yes	Yes	Yes	Yes, the TLN representative is the current President of CLTM. TLN is also an active participant in different reflection groups about, for instance, Fit for 55, the mobility package and the attractiveness of the profession	Yes		ECTA (direct, membership fee, involved), Clecat (direct, membership fee, involved)

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Directly affiliated with the IRU for its road transport members?	Involved in the decision-making structures/ management bodies of the IRU?	Payment of fees to the IRU for its road transport members?	Actively involved in the working groups of the IRU?	Actively involved in the ESSDC for road transport on behalf of the IRU?	Indirect membership of, link to or cooperation with the IRU?	Affiliated with any other European organisations for its road transport members?
NL	Evofofedex	Yes	Yes	Yes	Yes	Respondent did not know		European Shippers' Council as a stakeholder for (road) shippers in Europe
NL	KNV-Bus	Yes	Yes	Yes	Yes	Yes		UITP (KNV-Bus)
PL	ZMPD	Yes	Yes	Yes	Yes	Yes		
PT	Antram	Yes	Yes	Yes	Yes	Yes		
PT	Antrop	Yes	Yes	Yes	Yes	Yes		
RO	UNTRR	Yes	Yes	Yes	Yes	Yes		UNTRR is member of Concordia Confederation, which is affiliated with BusinessEurope
SE	BA	Yes	Yes	Yes	Yes	Yes		Clecat (with the Transportindustri-förbundet, another submember of Transportföretagen)
SE	SBF	Yes	Yes	Yes	Yes: Vice President of the CTP and current President of the ESSDC	Yes		UITP
SI	GIZ Intertransport	Yes						
SK	Česmad	Yes	Yes	Yes	Yes	Yes		No information available now

**Notes:** CAS, IRU Commission on Social Affairs; Clecat, European Association for Forwarding, Transport, Logistics and Customs Services; CLTM, IRU Goods Transport Liaison Committee; CORTE, Confederation of Organisations in Road Transport Enforcement; CTP, IRU Passenger Transport Council; ECTA, European Chemical Transport Association.

**Source:** Network of Eurofound Correspondents



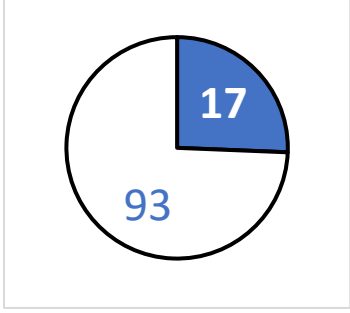
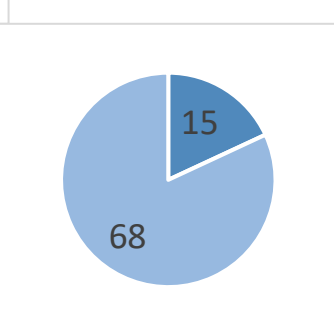
### 3.3. Representativeness of UITP Europe

#### 3.3.1. Overview of UITP Europe representativeness

The UITP affiliates 17 employer organisations/business associations in the sector in 12 Member States (Figure 12), which represents 15% of all 110 of the sector employer organisations/business associations. The UITP also affiliates 359 major urban public transport operators (individual employers) in 26 Member States (excluding Lithuania) (see Annex 6 for the full list of UITP member operators). Fifteen employer organisation members of the UITP are involved in collective bargaining, which represents 18% of all 83 employer organisations involved in collective bargaining in the sector. Taken together with the UITP member companies that are urban public transport operators, UITP members conduct sector-related collective bargaining in 26 Member States (with the exception of Lithuania, where there are no UITP members). A complete list of all UITP Europe member companies can be found in Annex 6. A country-by-country assessment of the three largest urban public transport companies, and whether they are directly affiliated with UITP Europe, is included in the country profiles in Annex 1.

Of the 80 employer organisations/business associations in the sector that are considered representative, all 17 UITP employer organisation affiliates (21%) are considered to be representative in 12 Member States.

Figure 12: Scoreboard illustrating the representativeness of UITP Europe

15% of employer organisations/business associations with members in the road transport sector are affiliated with UITP Europe (17/110) UITP Europe also has 359 urban public transport companies as direct members, in 26 Member States	26 Member States have an affiliated road transport employer organisation/business association and/or an affiliated UITP company			18% of employer organisations involved in sector-related collective bargaining are affiliated with UITP Europe (15/83)	In 26 Member States, UITP Europe has a member employer organisation or a member operator company involved in collective bargaining at sectoral or company level		
	AT BE BG CY CZ DE DK EE EL	ES FI FR HR HU IE IT LT LU	LV MT NL PL PT RO SE SI SK		AT BE BG CY CZ DE DK EE EL	ES FI FR HR HU IE IT LT LU	LV MT NL PL PT RO SE SI SK
	<b>Urban public transport</b>	<b>Rest of road transport</b>	<b>Whole road transport</b>	<b>Source</b>			
Total number of members in employer organisations affiliated with the UITP	3,314	3,750	7,064	Table 43			
Total number of members of all employer organisations in the sector	62,768	238,065	300,833	Table 18			
Total number of companies in the sector	284,472	548,774	846,802 <sup>35</sup>	Table 3			
Proportion of all employer organisation members, %	5.28	1.58	2.35				
Proportion of all companies in the sector, %	1.16	0.68	0.83				
Member States where all employer organisations are affiliated with the UITP	0						
Member States where the largest or second largest sectoral employer organisation/business association is affiliated with the UITP	10: DE, ES, FI, FR, IT, LU, NL, PL, PT, SE						

There are no Member States in which all of the national sectoral employer organisations/business associations are affiliated with the UITP. In the 12 Member States with UITP members, not all sector employer organisations/business associations are affiliated with the UITP (noting that no employer organisation exists in Cyprus). In 10 of the Member States where at least one sector employer organisation/business association is affiliated with the UITP, UITP employer organisation members are

<sup>35</sup> The subtotals of two previous columns add up to less than 846,802 due to some companies being counted in several categories.

the largest or second largest sector employer organisation/business association: Finland, France, Germany, Italy, Luxembourg, the Netherlands, Poland, Portugal, Spain and Sweden. The exception to this are the Austrian and Danish members of the UITP, which appear to be amongst the smaller organisations in the sector in those countries. The country profiles in Annex 1 set out further details about the membership strength of UITP employer organisation members in the Member States.

Table 40 summarises the sector-relatedness and the extent of overlap of UITP employer organisation affiliates in the different parts of the sector.

First, the analysis of the sector-relatedness of UITP employer organisation affiliates is undertaken from the perspective of the affiliates organising members in both urban public transport and the rest of road transport (the whole road transport sector), in urban public transport only or in the rest of road transport only. Eight UITP affiliates are organising in urban public transport only in eight Member States. There are eight UITP employer organisation affiliates overlapping, that is, organising in both urban public transport and the rest of road transport, in seven Member States. One UITP employer organisation affiliate in one Member State organises in the rest of road transport only.

**Table 40: General sector-relatedness and overlap of UITP affiliates**

Entire road transport ESSDC	Urban public transport working group	Rest of road transport working group	Detailed analyses	
17/110 employer organisations affiliated with the UITP (15%)	16/64 employer organisations (25%) (8/16 = 50% overlap)		8/36 employer organisations covering urban public transport activities (NACE 49.31, 49.32) only are affiliated with the UITP (22%)	47% of UITP employer organisation affiliates
		9/74 employer organisations (12%) (8/9 = 89% overlap)	8/28 employer organisations covering both urban public transport and the rest of road transport (whole road transport sector) are affiliated with the UITP (29%)	47% of UITP employer organisation affiliates
			1/46 employer organisation covering the rest of road transport (NACE 49.39, 49.41, 49.92) only is affiliated with the UITP (2%)	6% of UITP employer organisation affiliates

**Note:** See Table 41 for further analysis.

**Source:** Network of Eurofound Correspondents

Table 41 shows a detailed overview of UITP employer organisation affiliates' membership in the five different segments of the road transport sector.

Table 41: Detailed sector-relatedness and overlap of UITP employer organisation affiliates

Segments in the sector	Affiliated employer organisations organising members	Number of Members States with an affiliated employer organisation/number of Member States with an employer organisation	Member States with employer organisations but not affiliated with the UITP
NACE 49.31: Urban and suburban passenger land transport	17 UITP employer organisation affiliates 35% of all 49 employer organisations organising in this activity	13/24	11: BG, CZ, EE, EL, HR, HU, IE, LT, LU, LV, MT
NACE 49.32: Taxi operation	8 UITP employer organisation affiliates 18% of all 45 employer organisations organising in this activity	6/23	17: AT, BG, CZ, DE, DK, EE, EL, HR, HU, IE, LT, LU, LV, MT, RO, SI, SK
NACE 49.39: Other passenger land transport	12 UITP employer organisation affiliates 22% of all 54 employer organisations organising in this activity	9/26	17: AT, BG, CZ, EE, EL, FR, HR, HU, IE, LT, LU, LV, MT, PL, RO, SI, SK
NACE 49.41: Freight transport by road	9 UITP employer organisation affiliates 14% of all 66 employer organisations organising in this activity	7/25	18: AT, BG, CZ, DE, DK, EE, EL, HU, HR, IE, LT, LV, LU, MT, PL, RO, SI, SK
NACE 49.92: Removal services	6 UITP employer organisation affiliates 17% of all 35 employer organisations organising in this activity	6/20	14: CZ, DE, DK, EE, EL, HR, HU, IE, LT, LU, LV, MT, RO, SI

**Note:** See Table 42 for full analysis.

**Source:** Network of Eurofound Correspondents

### 3.3.2. Sector-relatedness of UITP Europe employer organisation affiliates

In this section, we present the analysis of the sector-relatedness of UITP employer organisation affiliates, first from the perspective of the affiliates organising members in both urban public transport and the rest of road transport, in urban public transport only and in the rest of road transport only.

This is then followed by a detailed analysis of UITP employer organisation affiliates' membership in the five different segments of the road transport sector.

As shown in Table 42, eight UITP employer organisation affiliates are organising in urban public transport only in eight Member States. There are eight UITP employer organisation affiliates overlapping, that is, organising in both urban public transport and the rest of road transport, in seven Member States. One UITP employer organisation affiliate in one Member State organises in the rest of road transport only.

Table 42: General sector-relatedness of UITP employer organisation affiliates in the sector

Member State	Employer organisation	Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport activities (NACE 49.39, 49.41, 49.92)
<b>Total number</b>		<b>110</b>	<b>28</b>	<b>46</b>
<b>Number of Member States with an employer organisation</b>		<b>21</b>	<b>17</b>	<b>24</b>
<b>Number of UITP-affiliated employer organisations organising this activity</b>		<b>8</b>	<b>8</b>	<b>1</b>
<b>Proportion of UITP-affiliated employer organisations in this activity, %</b>		<b>29%</b>	<b>22%</b>	<b>7%</b>
<b>Number of Member States with an UITP-affiliated employer organisation</b>		<b>7</b>	<b>8</b>	<b>1</b>
AT	FVSB (urban public transport)		Yes	
BE	FBAA	Yes		
BE	BVGSSV		Yes	
DE	VDV		Yes	
DK	DPT (whole road transport)	Yes		
DK	DI (whole road transport)	Yes		
ES	ATUC (urban public transport)		Yes	
FI	ALT (whole road transport)	Yes		
FR	UTP (urban public transport)		Yes	
FR	OTRE (rest of road transport)			Yes
IT	ANAV (whole road transport)	Yes		
IT	Asstra (urban public transport)		Yes	
NL	KNV (whole road transport)	Yes		
NL	VSV (urban public transport)		Yes	
PL	IGMK		Yes	
PT	Antrop (whole road transport)	Yes		
SE	SBF (whole road transport)	Yes		

Source: Network of Eurofound Correspondents

Table 43 shows the sector-relatedness of the UITP employer organisation members with respect to the different segments of the road transport sector where the UITP employer organisation members organise companies. In total, five such segments were identified in the study, and the extent of UITP employer organisation members representing companies in each segment is analysed below.

In **urban and suburban transport (NACE 49.31) activities**, 17 UITP employer organisation members in 13 Member States organise such companies. This represents 35% of all of the employer organisations organising companies in this segment of the sector, in 13 out of the 22 Member States where employer organisations are organising companies in this activity in the sector.

In 12 Member States, the UITP affiliates some but not all of the employer organisations organising companies in urban and suburban transport activities (in 1 Member State all employer organisations are affiliated). In 10 of these Member States, UITP affiliates organising companies in urban public transport activities are the largest or second largest employer organisation in the sector. The exception to this is the Austrian and Danish UITP employer organisation members, which appear to be smaller employer organisations in the sector.

In 10 Member States, there are employer organisations organising companies in urban and suburban transport activities but none is affiliated with the UITP.

In **taxi operations (NACE 49.32)**, eight UITP employer organisation members in six Member States organise such companies. This represents 18% of all of the employer organisations organising companies in this segment of the sector, in 6 out of the 24 Member States where employer organisations are organising companies in this activity in the sector.

In six Member States, the UITP affiliates some but not all of the employer organisations organising companies in taxi operations. In all six Member States, UITP employer organisation affiliates organising companies in taxi operations are the largest or second largest employer organisation in the sector.

In 18 Member States, there are employer organisations organising companies in taxi operations but none is affiliated with the UITP.

In **passenger road transport (NACE 49.39) activities**, 12 UITP members in nine Member States organise such companies. This represents 22% of all of the employer organisations organising companies in this activity in the sector, in 9 of the 25 Member States where employer organisations are organising companies in this activity in the sector.

In nine Member States, the UITP affiliates some but not all of the employer organisations organising companies in passenger road transport activities. In seven of these Member States, UITP employer organisation affiliates organising companies in passenger road transport activities are the largest or second largest employer organisation in the sector. The exception to this is the Austrian and Danish UITP employer organisation members, which appear to be smaller employer organisations in the sector.

In 16 Member States, there are employer organisations organising companies in passenger road transport activities but none is affiliated with the UITP.

In **freight road transport (NACE 49.41) activities**, nine UITP employer organisation members in seven Member States organise such companies. This represents 14% of all of the employer organisations organising companies in this activity in the sector, in 7 out of the 22 Member States where employer organisations are organising companies in this activity in the sector.

In seven Member States, the UITP affiliates some but not all of the employer organisations organising companies in freight road transport activities. In all seven Member States, UITP employer organisation affiliates organising companies in freight road transport activities are the largest or second largest employer organisation in the sector.

In 15 Member States, there are employer organisations organising companies in freight road transport but none is affiliated with the UITP.

In **removal services (NACE 49.92)**, six UITP employer organisation members in six Member States organise such companies. This represents 17% of all of the employer organisations organising companies in this activity in the sector, in six out of the 20 Member States where employer organisations are organising companies in this activity in the sector.

In six Member States, the UITP affiliates some but not all of the employer organisations organising companies in removal services. In all six Member States, UITP affiliates organising companies in removal services are the largest or second largest employer organisation in the sector.

In 13 Member States, there are employer organisations organising companies in removal services but none is affiliated with the UITP.

Table 43: Sector-relatedness of UITP member employer organisations

Member State	Employer organisation	Number of members of employer organisations in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members of employer organisations in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Organises members in the following sectors?					Affiliated with the IRU?	Affiliated with the UITP?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
<b>Total number of employer organisations</b>						49	45	54	66	35		
<b>Number of Member States with employer organisations</b>						24	24	26	26	20		
<b>Number of UITP-affiliated employer organisations</b>		3,314		3,750		17	8	12	9	6	6	17
<b>Proportion of all employer organisations in this segment, %</b>						35	18	22	14	17		
<b>Number of Member States with UITP-affiliated employer organisations</b>						13	6	9	7	6	6	12
AT	FVSB (urban public transport)	20	3	No members		Yes						Yes
BE	FBAA	88		235		Yes	Yes	Yes	Yes		Yes	Yes
BE	BVGSSV	3		No members		Yes		Yes				Yes
DE	VDV	295	2	No members		Yes		Yes				Yes
DK	DPT (whole road transport)	1,700		140		Yes		Yes			Yes	Yes
DK	DI (whole road transport)	76		549		Yes		Yes	Yes	Yes	Yes	Yes
ES	ATUC (urban public transport)	86	2	No members		Yes	Yes	Yes	Yes	Yes		Yes
FI	ALT (whole road transport)	130	1	672	2	Yes		Yes	Yes			Yes



## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation	Number of members of employer organisations in urban public transport activities (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members of employer organisations in the rest of road transport (NACE 49.39, 49.41, 49.92)	Size ranking in the rest of road transport (NACE 49.39, 49.41, 49.92)	Organises members in the following sectors?					Affiliated with the IRU?	Affiliated with the UITP?
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)		
FR	UTP (urban public transport)	170		No members		Yes			Yes	Yes		Yes
FR	OTRE (rest of road transport)	No members		1,927	2	Yes	Yes					Yes
IT	ANAV (whole road transport)	No data	1	No data	1–2	Yes	Yes	Yes	Yes	Yes	Yes	Yes
IT	Asstra (urban public transport)	153	2	No members		Yes			Yes			Yes
NL	KNV (whole road transport)	168	1	148		Yes	Yes	Yes	Yes	Yes	Yes	Yes
NL	VSV (urban public transport)	7		No members		Yes	Yes	Yes	Yes			Yes
PL	IGMK	157	1	No members		Yes						Yes
PT	Antrop (whole road transport)	12	2	69		Yes		Yes				Yes
SE	SBF (whole road transport)	249	1–2	10		Yes	Yes	Yes		Yes	Yes	Yes

Table 44 shows the sector-relatedness of some of the key UITP member companies (see also the list of all of the EU public transport operators affiliated with the UITP in Annex 6).

Table 44: Sector-relatedness of some of the key UITP member companies

Member State	Company	Number of employees and/or estimated % of the national urban public transport workforce	Active in the following sectors?		Covers the following types of public transport?						
			Urban and suburban transport (NACE 49.31)	Taxi operations (NACE 49.32)	Bus	Light rail/tram	Metro	Local/regional rail	Trolley bus	Water-borne urban public transport	Shared cars/bikes scooters
<b>Total</b>	<b>54</b>		<b>51</b>	<b>3</b>	<b>38</b>	<b>29</b>	<b>17</b>	<b>13</b>	<b>17</b>	<b>10</b>	<b>6</b>
<b>Number of Member States</b>			<b>26</b>	<b>3</b>	<b>21</b>	<b>17</b>	<b>12</b>	<b>9</b>	<b>11</b>	<b>8</b>	<b>5</b>
AT	Wiener Linien	8,700 employees (~25%)	Yes		Yes	Yes	Yes	Yes			Yes
AT	Innsbrucker Verkehrsbetriebe und Stubaitalbahn	700 employees (2%)	Yes		Yes	Yes		Yes			
BE	De Lijn	No data	Yes		Yes	Yes	Yes		Yes	Yes	
BG	Метрополитен ЕАД	16.4% (2,033 employees)	Yes	Yes				Yes			
BG	Столичен електротранспорт ЕАД	16.2% (2,000 employees)	Yes			Yes			Yes		
CY	Cyprus Public Transport	~600 employees (Cyprus Public Transport is comprised of two subsidiary companies: Nicosia Public Transport with ~400 employees and Larnaca Public Transport with ~200 employees)	Yes		Yes						
CZ	Dopravní podnik hlavního města Prahy AS	32% in 2021	Yes		Yes	Yes	Yes		Yes	Yes	
DE	Deutsche Bahn AG	No data. Deutsche Bahn employs a total of 211,300 employees in Germany. We	Yes		Yes			Yes			

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Number of employees and/or estimated % of the national urban public transport workforce	Active in the following sectors?		Covers the following types of public transport?							
			Urban and suburban transport (NACE 49.31)	Taxi operations (NACE 49.32)	Bus	Light rail/tram	Metro	Local/regional rail	Trolley bus	Water-borne urban public transport	Shared cars/bikes scooters	
		have no information on how many of them work in urban public transport										
DK	Odense Letbane	14%	Yes			Yes						
DK	Arriva Denmark AS	1,400 employees	Yes		Yes			Yes		Yes	Yes	
DK	Danske Statsbaner		Yes				Yes					
EE	AS Tallinna Linnatransport	35%	Yes		Yes	Yes			Yes			
EL	Athens Urban Transport Organisation SA	The company employs 0.2% of the total workforce in NACE 49.3; the group employs 16% of the total workforce in NACE 49.3	Yes		Yes	Yes	Yes		Yes			
EL	Road Transport SA	~11%	Yes		Yes				Yes			
EL	Urban Rail Transport SA	~5%	Yes			Yes	Yes					
EL	Thessaloniki Urban Transport Organisation	~3.5%	Yes		Yes							
EL	Hellenic Train	~3%	Yes					Yes				
ES	Empresa Municipal de Transportes de Madrid SA	9,366 employees	Yes		Yes							Yes
FI	Pääkaupunkiseudun kaupunkiliikenne OY	~8% if both NACE codes are included. ~19% if only NACE 49.31 is counted, which is where the company operates	Yes			Yes	Yes			Yes	Yes	
FR	Régie autonome des transports parisiens	44,332 employees (2021)	Yes		Yes	Yes	Yes	Yes	Yes	Yes		
FR	Transdev	27,000 employees	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
FR	Keolis SA	17,000 employees	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Number of employees and/or estimated % of the national urban public transport workforce	Active in the following sectors?		Covers the following types of public transport?							
			Urban and suburban transport (NACE 49.31)	Taxi operations (NACE 49.32)	Bus	Light rail/tram	Metro	Local/regional rail	Trolley bus	Water-borne urban public transport	Shared cars/bikes scooters	
HR	None											
HU	Budapesti Közlekedési Zrt	10,345 employees (31 December 2021)	Yes		Yes	Yes	Yes		Yes	Yes		
HU	Debreceni Közlekedési Zrt	644 employees (2 February 2023)	Yes		Yes	Yes			Yes			
IE	Córas Iompair Éireann	Over 10,000 employees. Largest provider of public transport services in Ireland	Yes		Yes	Yes						
IT	Ferrovie dello Stato Italiane	No data. Ferrovie dello Stato has ~82,000 employees in NACE 49.31, but the proportion of the total number of employees in the sector is unknown	Yes		Yes		Yes	Yes				
IT	ATM	No data. ATM has ~10,000 employees in NACE 49.31, but the proportion of the total number of employees in the sector is unknown	Yes		Yes	Yes	Yes		Yes			
IT	ATAC	No data. ATAC has ~11,000 employees in NACE 49.31, but the proportion of the total number of employees in the sector is unknown	Yes		Yes	Yes	Yes	Yes	Yes			
LU	None											
LV	Rīgas Satiksme	~30%	Yes		Yes	Yes			Yes			
MT	Malta Public Transport	1,300	Yes		Yes							
NL	Gemeente- vervoerbedrijf/ GVB Amsterdam	10%	Yes		Yes	Yes	Yes			Yes		

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Number of employees and/or estimated % of the national urban public transport workforce	Active in the following sectors?		Covers the following types of public transport?							
			Urban and suburban transport (NACE 49.31)	Taxi operations (NACE 49.32)	Bus	Light rail/tram	Metro	Local/regional rail	Trolley bus	Water-borne urban public transport	Shared cars/bikes scooters	
PL	Zarząd Transportu Miejskiego w Warszawie (ZTM) <sup>36</sup>	No data		Yes								
PL	Miejskie Przedsiębiorstwo Komunikacyjne SA w Krakowie	No data	Bus and tram transport services	Yes								
PT	Companhia Carris de Ferro de Lisboa EM SA	8.6%	Yes		Yes	Yes						
PT	CP – Comboios de Portugal EPE	6.3%	Yes					Yes				
PT	Metropolitano de Lisboa EPE	5.2%	Yes				Yes					
PT	STCP – Sociedade de Transportes Coletivos do Porto EIM, SA	4.5%	Yes		Yes	Yes						
PT	Transportes Sul do Tejo	3.2%	Yes		Yes							
PT	Transdev	3.2%	Yes		Yes							
PT	Empresa Transportes Urbanos de Braga EM	1.2%	Yes		Yes							
PT	Transtejo e Soflusa	1.5%					Yes			Yes		
PT	Metro do Porto	0.3%	Yes				Yes					
PT	Metro-Mondego SA	0.1%	Yes		Yes							
RO	Oradea Transport Local SA	529 employees	Yes		Yes	Yes						

<sup>36</sup> ZTM is not a company, has no rolling stock and does not carry out transport. ZTM is a budgetary unit of the Capital City of Warsaw and acts as the organiser of public transport on behalf of the Capital City of Warsaw. ZTM is responsible for the organisation, management and supervision of public transport in Warsaw (especially coordination of the public companies: Metro Warszawskie, Tramwaje Warszawskie and Miejskie Zakłady Autobusowe) and the surrounding local government units (based on individual agreements).

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Number of employees and/or estimated % of the national urban public transport workforce	Active in the following sectors?		Covers the following types of public transport?							
			Urban and suburban transport (NACE 49.31)	Taxi operations (NACE 49.32)	Bus	Light rail/tram	Metro	Local/regional rail	Trolley bus	Water-borne urban public transport	Shared cars/bikes scooters	
RO	Societatea de Transport Bucuresti (STB) SA	30–35%	Yes		Yes	Yes				Yes		
RO	Compania de Transport Public Cluj-Napoca SA (Cluj-Napoca Public Transport Company)	~4%	Yes		Yes	Yes				Yes		
SE	MTR Nordic	6,500 employees	Yes					Yes	Yes			
SI	Javno podjetje ljubljanski potniški promet doo	70%	Yes		Yes							
SI	Javno podjetje za mestni potniški promet Marprom doo	25%	Yes		Yes							
SK	Dopravný podnik Bratislava AS (Transportation Company Bratislava)	~2,779 employees in 2020 (~40% of the NACE 49.31 workforce and ~35% of the NACE 49.31 and NACE 49.32 workforce). The proportion could be lower, as the number of NACE 49.32 employees (1,183) does not include the companies with an unstated number of employees	Yes		Yes	Yes				Yes		

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Number of employees and/or estimated % of the national urban public transport workforce	Active in the following sectors?		Covers the following types of public transport?							
			Urban and suburban transport (NACE 49.31)	Taxi operations (NACE 49.32)	Bus	Light rail/tram	Metro	Local/regional rail	Trolley bus	Water-borne urban public transport	Shared cars/bikes scooters	
SK	Dopravný podnik Mesta Košice AS (Transportation Company of the City of Kosice)	There was a total of 990 employees on 31 December 2021 (~15% of the NACE 49.31 workforce and ~13% of the NACE 49.31 and NACE 49.32 workforce). The proportion could be lower, as the number of NACE 49.32 employees (1,183) does not include the companies with an unstated number of employees	Yes		Yes	Yes						
SK	Arriva Nitra	There was a total of 434 employees on 31 December 2021 (~6.5% of the NACE 49.31 workforce and ~5.5% of the NACE 49.31 and NACE 49.32 workforce). The proportion could be lower, as the number of NACE 49.32 employees (1,183) does not include the companies with an unstated number of employees	Yes		Yes							

**Notes:** *n.a.*, not applicable. The companies in this table are those that cooperated in the data collection for this study. A full list of all UITP member companies can be found in Annex 6.

**Source:** Network of Eurofound Correspondents

### 3.3.3. UITP Europe members in the industrial relations landscape in the sector at national and EU levels

The position in the industrial relations landscape and collective bargaining processes of the UITP employer organisation/business association affiliates in 12 Member States is shown in Table 45. Fifteen employer organisation members are involved in collective bargaining, which represents 18% of all 83 of the employer organisations involved in collective bargaining. Taken together with the UITP member companies, UITP members conduct sector-related collective bargaining in 26 Member States (with the exception of Lithuania, which does not have any UITP members).

Of the 80 employer organisations/business associations in the sector that are considered representative, all 17 UITP employer organisation affiliates (21%) are considered to be representative in 12 Member States.

Eleven UITP employer organisation/business association members are involved in social dialogue activities, while 16 are consulted by the government on sector-related matters.



Table 45: Involvement of UITP employer organisations/business associations in the industrial relations landscape in the whole road transport sector at Member State level

Member State	Employer organisation/business association	Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	UITP member?
<b>Total</b>	<b>110</b>	<b>80</b>	<b>77</b>	<b>96</b>	<b>83</b>	
<b>Number of Member States with an employer organisation</b>		<b>26</b>	<b>26</b>	<b>26</b>	<b>26</b>	
<b>Number of UITP affiliates</b>		<b>17</b>	<b>11</b>	<b>16</b>	<b>15</b>	<b>17</b>
<b>Number of Member States with UITP affiliates</b>		<b>12</b>	<b>9</b>	<b>12</b>	<b>12</b>	<b>12</b>
AT	FVSB	Yes	Yes	Yes	Yes	Yes
BE	FBAA	Yes	Yes	Yes	Yes	Yes
BE	BVGSSV	Yes	Yes		Yes	Yes
DE	VDV	Yes		Yes	Yes	Yes
DK	DPT	Yes	Yes	Yes		Yes
DK	DI	Yes		Yes	Yes	Yes
ES	ATUC	Yes		Yes	Yes	Yes
FI	ALT	Yes	Yes	Yes	Yes	Yes
FR	OTRE	Yes		Yes		Yes
FR	UTP	Yes	Yes	Yes	Yes	Yes
IT	ANAV <sup>37</sup>	Yes	Yes	Yes	Yes	Yes
IT	ASSTRA	Yes	Yes	Yes	Yes	Yes
NL	KNV	Yes	Yes	Yes	Yes	Yes
NL	VSV <sup>38</sup>	Yes		Yes	Yes	Yes
PL	IGMK	Yes	Yes	Yes	Yes	Yes
PT	ANTROP	Yes		Yes	Yes	Yes
SE	SBF	Yes	Yes	Yes	Yes	Yes

<sup>37</sup> ANAV is the only employer association to subscribe to both of the national collective agreements (the collective agreements of the public transport sector and of the bus and car rental sector).

<sup>38</sup> The main objective of VSV is to partner with the education ministry regarding the contract for students' right to use public transport in the Netherlands. In this regard, VSV represents GVB (Amsterdam), RET (Rotterdam) and HTM (The Hague).

Table 46 gives an overview of the involvement of some of the key UITP member companies in the industrial relations landscape in their countries (see Annex 6 for the full list).

Table 46: Involvement of some of the key UITP member companies in the industrial relations landscape of urban public transport activities at Member State level

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
<b>Total</b>	<b>54</b>	<b>7</b>	<b>38</b>	<b>31</b>	<b>40</b>	<b>Ad hoc: 12 Regular: 14</b>	<b>30</b>	<b>35</b>
<b>Number of Member States</b>		<b>5</b>	<b>22</b>	<b>16</b>	<b>21</b>	<b>Ad hoc: 8 Regular: 10</b>	<b>17</b>	<b>20</b>
AT	Wiener Linien		Yes		Yes	Ad hoc		FVSB, which is a subsectoral organisation of WKO
AT	Innsbrucker Verkehrsbetriebe und Stubaitalbahn							FVSB and, as such, WKO
BE	De Lijn	Unknown	Yes		Formally no			Yes
BG	Метрополитен ЕАД		Yes	Yes	Yes	Regularly		
BG	Столичен електротранспорт ЕАД		Yes	Yes	Yes	Regularly	Yes: construction and maintenance of transport infrastructure	Yes, United Business Clubs and Electric Vehicles Industrial Cluster
CY	Cyprus Public Transport		Yes	Yes, bipartite	Yes <sup>39</sup>	Often, but on an ad hoc basis		

<sup>39</sup> The Department of Public Private Transportation is responsible for outsourcing urban public transport services to private companies; there are some obligatory guidelines for the concessionaire companies, one of which is that they have to bargain with trade unions and sign collective agreements. As such, Cyprus Public Transport affects the working conditions in the sector through these bipartite negotiations with trade unions. In regard to other decisions, for example the improvement of the network or the initiation of a new route, the government always seeks the expert opinion of the company.

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
CZ	Dopravní podnik hlavního města Prahy, AS (Prague Public Transit Company)		Yes	Yes	As the company is owned by the Prague municipality, it can be assumed that its interests and those of the city of Prague are the same	Not relevant	Yes	Sdružení dopravních podniků České republiky
DE	Deutsche Bahn AG			There is no standing social dialogue body in Germany			Yes: railways, logistics (cargo)	Deutsche Bahn is a member of the employer organisation AGV Move (railways and mobility). AGV Move is a member of the cross-sectoral association BDA
DE	Berliner Verkehrsbetriebe (BVG)		Yes	Yes	Yes	Ad hoc		Kommunaler Arbeitgeberverband Berlin
DE	Stadtwerke Bonn Verkehrs GmbH			Yes	Yes	Both		Energy supplier, grid operator
DK	Odense Letbane				Yes, involved in the shaping of urban public transport policy in the municipality of Odense. Working conditions are a matter of collective bargaining	Regularly		Odense Letbane is not a member of an employer organisation

Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
DK	Arriva Denmark AS	Yes	Yes, in collaboration with DI. Arriva participates in the meetings during the negotiations and/or participates directly in collective bargaining on collective agreements at company level	Yes, indirectly through its membership of DI <sup>40</sup>	Arriva is heard by different actors on issues such as working conditions. In practice, voicing interests often happens through employer, business and interest organisations, such as DI and DPT	Ad hoc	Yes: education. Arriva runs the company UCplus, which provides vocational training in the fields of transport and security guard training and Danish-language training for foreigners	DI

<sup>40</sup> Arriva is part of DI's negotiation committee, etc., and is part of the board of The Transport Training Board of Denmark and of branch committees.

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
DK	Danske Statsbaner (Danish State Railways)	Yes, Danske Statsbaner negotiates three collective company agreements	Danske Statsbaner is a member of DI	Danske Statsbaner is informed and consulted by the central authorities about important topics regarding urban public transport. However, working conditions are subject to collective bargaining between the social partners. In so far as the company participates together with DI in collective bargaining, they have influence on decisions regarding working conditions		Yes, ad hoc	Danske Statsbaner is a <i>Selvstændig Offentligt Virksomhed</i> (independent public company). In short, this means that the company functions economically independently of the state grant system, and hence generates its own income and assets	Danske Statsbaner is negotiating its own collective agreement as a social partner. It is also covered by a series of collective agreements negotiated by DI
EE	AS Tallinna Linnatransport		Yes		Yes, at local level. There is a regular exchange of information between both sides. They receive legislation and express their opinion on relevant topics	Ad hoc	Yes: renting real estate, technical inspection of cars, advertising mediation, driving education	The Estonian Employers' Confederation

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
EL	Athens Urban Transport Organisation SA		Yes	Bipartite	Yes <sup>41</sup>	Ad hoc		
EL	Road Transport SA		Yes	Bipartite	Yes <sup>42</sup>	Ad hoc		
EL	Urban Rail Transport SA		Yes	Bipartite	Yes	Ad hoc		
EL	Thessaloniki Urban Transport Organisation		Yes	Bipartite	Yes <sup>43</sup>	Ad hoc		
EL	Hellenic Train		Yes	Bipartite	Yes	Ad hoc	Yes: NACE 49.1, 49.2, 52.21, 52.22	No available answer. Most probably none
ES	Empresa Municipal de Transportes de Madrid SA		Yes	Yes			Yes: it also provides parking	ATUC
FI	Pääkaupunkiseudun kaupunkiliikenne OY (Metropolitan Area Transport Ltd)				Most likely yes			
FR	Régie autonome des transports parisiens	Yes	Yes	Yes	Yes	Regularly	Yes (transport engineering, etc.)	
FR	Transdev						Yes	Yes
FR	Keolis SA	Yes	Yes				Yes: parking, autonomous mobility, renting of cars and buses with drivers, medical transport, rail transport	Yes
HU	Budapesti Közlekedési Zrt		Yes		Yes, indirectly	Indirectly, ad hoc, through BKK		

<sup>41</sup> Because Athens Urban Transport Organisation is responsible for the strategic and operational planning, coordination and control of public transport in the Attica region, it has regular contact with the relevant state bodies, but not at set intervals.

<sup>42</sup> As a subsidiary company of Athens Urban Transport Organisation, it has regular contact with the relevant state bodies, but not at set intervals.

<sup>43</sup> Because Thessaloniki Urban Transport Organisation is responsible for the strategic and operational planning, coordination and control of public transport in the Thessaloniki region, it is in contact with the relevant state bodies.

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
HU	Debreceni Közlekedési Zrt		Yes		Yes, indirectly	Indirectly, ad hoc, through BKK		
IE	Córas Iompair Éireann	Yes, to an extent	Yes	Yes	Yes, engages with the National Transport Authority, particularly with Dublin Bus	Regularly		Yes
IT	Ferrovie dello Stato Italiane		Yes	Yes			Since Ferrovie dello Stato is entirely controlled by the Ministry of Economy and Finance, it is a public company	Yes, Confindustria
IT	ATM						ATM is a company owned by the municipality of Milan and therefore qualifies as a public company	
IT	ATAC						ATAC is a company owned by the municipality of Rome and therefore qualifies as a public company	Yes, UITP
LV	Rīgas Satiksme		Yes	No sector agreement	Some involvement at city level. No effect on the sector as a whole	Ad hoc	Yes: parking management	Latvian Employers' Confederation
MT	Malta Public Transport		Yes		Yes; no further data were provided		Malta Public Transport is a private company	Malta Employers Association

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
NL	Gemeentevervoerbedrijf/GVB Amsterdam	No, the company has a company-level agreement	Yes		Yes, there are different platforms in the Netherlands in which public transport companies, (local) authorities and other stakeholders cooperate: the Mobility Alliance, DOVA, CROW	Regularly		Branche organisation OV-NL
PL	Zarząd Transportu Miejskiego w Warszawie			Bipartite	Yes, but only indirectly, mainly via Izba Gospodarcza Komunikacji Miejskiej (IGMK). In cooperation with Forum Organizatorów Transportu (FOT), Zarząd Transportu Miejskiego w Warszawie consults legislation-related projects	Regularly, during public law consultations and proper parliamentary committee meetings	A budgetary unit of the capital city of Warsaw (without legal personality)	IGMK, Polski Związek Pracodawców Transportu Publicznego (PZPTP), Forum Organizatorów Transportu (informal initiative)
PL	Miejskie Przedsiębiorstwo Komunikacyjne SA w Krakowie			Yes, unknown which	No, but it is part of IGMK and PZPTP			
PT	Companhia Carris de Ferro de Lisboa EM SA		Yes		Carris is represented at the TML's Advisory Council on Mobility Technologies, but not at the TML's Metropolitan Mobility Council	Regularly	No, Carris' activities outside NACE 49.31 are related to its core business in urban public transport	Yes



## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
PT	CP – Comboios de Portugal EPE		Yes		CP is represented at the TML's Advisory Council on Mobility Technologies, but not at the TML's Metropolitan Mobility Council	Regularly	Yes, the other major activities of CP are NACE 49.10 (passenger rail transport, interurban) and 49.20 (freight rail transport)	Yes
PT	Metropolitano de Lisboa EPE		Yes		Metropolitano de Lisboa is represented at the TML's Advisory Council on Mobility Technologies, but not at the TML's Metropolitan Mobility Council	Regularly		Yes
PT	STCP – Sociedade de Transportes Coletivos do Porto EIM SA		Yes		No consultation of STCP by authorities detected	Does not apply	Intermunicipal company, status of a limited company ( <i>sociedade anónima</i> ), 100% owned by several municipalities of the Metropolitan Area of Porto	Associação Empresarial de Portugal (Entrepreneurial Association of Portugal, AEP). AEP is a business association that is affiliated with Confederação Empresarial de Portugal (Confederation of Portuguese Business, CIP). CIP is both a business association and an employer organisation
PT	Transportes Sul do Tejo		Yes		No consultation or involvement detected	Does not apply	Yes	

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
PT	Transdev	Yes, via Antrop			No consultation or involvement detected	Does not apply	Yes, the other major activities of Transdev are NACE 49.31 (urban and suburban passenger transport) and 49.39 (other passenger transport n.e.c.)	To CCP via Antrop
PT	Empresa Transportes Urbanos de Braga EM					Does not apply		Municipal Enterprise, 100% owned by the municipality of Braga
PT	Transtejo e Soflusa		Yes			Does not apply		
PT	Metro do Porto					Does not apply	Limited company owned by the state (47%), Metropolitan Area of Porto (35%), STCP (15) and CP (3%)	UITP
PT	Metro-Mondego SA				No involvement detected	Does not apply		
RO	Oradea Transport Local SA		Yes	Bipartite	Legally, the company is consulted by the local authorities regarding the local policies and strategies on local transport	Regularly	Public limited company	Uniunea Romana de Transport Public (Romanian Union of Public Transport) and Federația TUSMC (Federation of Urban, Suburban and Metropolitan Passenger Transport Operators)

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
RO	Societatea de Transport Bucuresti (STB) SA		Yes	Bipartite	Partially. Legally, the company is consulted by the local authorities regarding the local policies and strategies on local transport	Ad hoc	The majority shareholder is the General Council of Bucharest Municipality	
RO	Compania de Transport Public Cluj-Napoca SA(Cluj-Napoca Public Transport Company)		Yes	Bipartite	Legally, the company is consulted by the local authorities regarding the local policies and strategies on local transport	Regularly	The majority shareholder is the Local Council of Cluj-Napoca Municipality	Uniunea Romana de Transport Public (Romanian Union of Public Transport) and Federația TUSMC (Federation of Urban, Suburban and Metropolitan Passenger Transport Operators)
SE	MTR Nordic	Indirectly, through Tågforetagen	There is no separate collective agreement with MTR or SEKO, so no		Yes, they are involved in the shaping of metro and rail urban public transport and in contact with the regional transport authority	Regularly	Yes: interurban rail, facilities management, maintenance and technology work (related to rail industries)	Almega – Tågforetagen, which is part of Svenskt Näringsliv
SI	Javno podjetje ljubljanski potniški promet doo		Yes	Yes, bipartite, company level	Yes. The company accepts proposals for change from urban public transport stakeholders. It reviews the proposal and, if appropriate, forwards it to the city regulators for consideration	Ad hoc	In the Association of Professional and Registration Organisations for Motor Vehicles and Trailers	Chamber of Commerce and Industry of Slovenia – Transport Association

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
SI	Javno podjetje za mestni potniški promet Marprom doo		Yes	Yes, bipartite, company level	Yes, with local authorities (Office for Public Works, Transport and Spatial Planning)	Regularly	Yes	Združenje za promet (Chamber of Commerce and Industry – Transport Association) and Sekcija za promet in zveze (Transport and Communications Section)
SK	Dopravný podnik Bratislava AS	No information available now	Yes	Bipartite with: - base organisation of IOZ at Dopravný podnik Bratislava (electric lines, technical infrastructure) - base organisation of IOZ at Dopravný podnik Bratislava (bus division) - Bratislava trade union of urban public transportation drivers	No information available now			UDPaT

## Representativeness of the European social partner organisations: Road transport sector

Member State	Company	Involved in the following areas?		Involved in bi-/tripartite bodies?	Consulted by local/regional/central authorities?	Regularly/ad hoc	Active in other sectors?	Affiliated with a national employer organisation?
		Sectoral bargaining for urban public transport	Company bargaining for urban public transport					
SK	Dopravný podnik Mesta Košice AS (Transportation Company of the City of Kosice)	No information available now	Yes	Bipartite with: - base organisation of IOZ at Dopravný podnik Mesta Košice - base organisation of urban public transportation drivers at Dopravný podnik Mesta Košice	No information available now			No information available now
SK	Arriva Nitra	ZAD, APZD via ZAD	Only Arriva Service s.r.o. is affiliated with the UITP. Arriva Service s.r.o. is a maintenance company		Yes, higher level collective bargaining	Yes	It is a subsidiary of the multinational company	

**Notes:** WKO, Austrian Federal Economic Chamber.

**Source:** Network of Eurofound Correspondents

Considering Tables 45 and 46 together, the UITP has affiliated employer organisations in 12 Member States, but has also company members that are involved in collective bargaining in 13 Member States. The two countries where the UITP has a member but not one involved in collective bargaining are Denmark and France. There are 21 Member States in which there are companies involved in collective bargaining that are affiliated with the UITP. For Lithuania and Luxembourg, there was no information on any company affiliated with the UITP (see Table 46). In Finland, Poland and Sweden, there are companies affiliated with the UITP, but none is involved in collective bargaining. Therefore, the UITP has either an affiliated employer organisation or an affiliated company involved in collective bargaining in 24 of the 27 Member States. The only two Member States where this is not the case are Croatia and Lithuania, according to the information provided for Tables 45 and 46.

In Lithuania, the UITP has no member company, while, in Croatia, the UITP has two members: Arriva Hrvatska, which is an operator, and Grad Dubrovnik, which is an authority regulating urban public transport in Dubrovnik. There is no information available on whether either of those two Croatian members of the UITP are involved in collective bargaining at company level.

Table 47 shows the involvement of the UITP employer organisation affiliates in the UITP internal structures. All UITP members are involved in the General Assembly of the UITP that meets once a year. The General Assembly is the highest decision-making body in the UITP. All UITP members pay a membership fee, which varies depending on the size of the company. The UITP has a huge number of committees and working groups, most of which are organised at international level. Regarding active involvement in the ESSDC on behalf of the UITP, a limited number of members are directly involved in the meetings. However, preparation for those meetings takes place within two UITP committees (the EU Committee and the Human Resources Committee); therefore, the members that are involved in these committees are indirectly involved in the ESSDC.

Table 47: Involvement of UITP member employer organisations in the UITP internal structures

Member State	Employer organisation	Directly affiliated with the UITP?	Involved in the decision-making structures of the UITP?	Payment of fees to the UITP?	Actively involved in the working groups of the UITP?	Actively involved in the ESSDC on behalf of the UITP?	Affiliated with any other European organisations?
Total number of UITP employer organisations		17	11	17	12	9	1
Number of Member States		12	9	12	10	8	1
AT	FVSB	Yes		Yes	Yes, Euroteam		
BE	FBAA	Yes		Yes	Yes		
BE	BVGSSV	Yes		Yes			
DE	VDV	Yes	Yes	Yes	Yes	Yes, indirectly	
DK	DPT	Yes		Yes		Yes, no further information provided	
DK	DI	Yes		Yes	Not directly, but DI is involved through collaboration with the other actors within the sector in Denmark		
ES	ATUC	Yes	Yes	Yes	Yes, EU committee		
FI	ALT	Yes	Yes	Yes	Yes	Yes	
FR	UTP	Yes	Yes	Yes	Yes	Yes	
IT	ANAV	Yes	Yes	Yes	Yes		
IT	Asstra	Yes	Yes	Yes	Yes	Yes	
NL	KNV	Yes	Yes	Yes			
NL	VSV	Yes	Yes	Yes	Yes	Yes, indirectly	
PL	IGMK	Yes	Yes	Yes	Yes	Yes, indirectly	
PT	Antrop	Yes		Yes			
SE	SBF	Yes	Yes	Yes	Yes, EU committee	Yes	Yes, directly
SE	Svensk KollektivTrafik	Yes	Yes	Yes	Yes	Yes	

### 3.4. Trade unions not affiliated with the ETF

In this section, an analysis is undertaken to describe those sector-related trade unions that are not affiliated with the ETF. This sheds light on the trade unions in the sector that are currently not represented in the ESSDC. The analysis below provides an overview of, first, their number and their sectoral coverage and, second, their position in the industrial relations landscape in their national contexts.

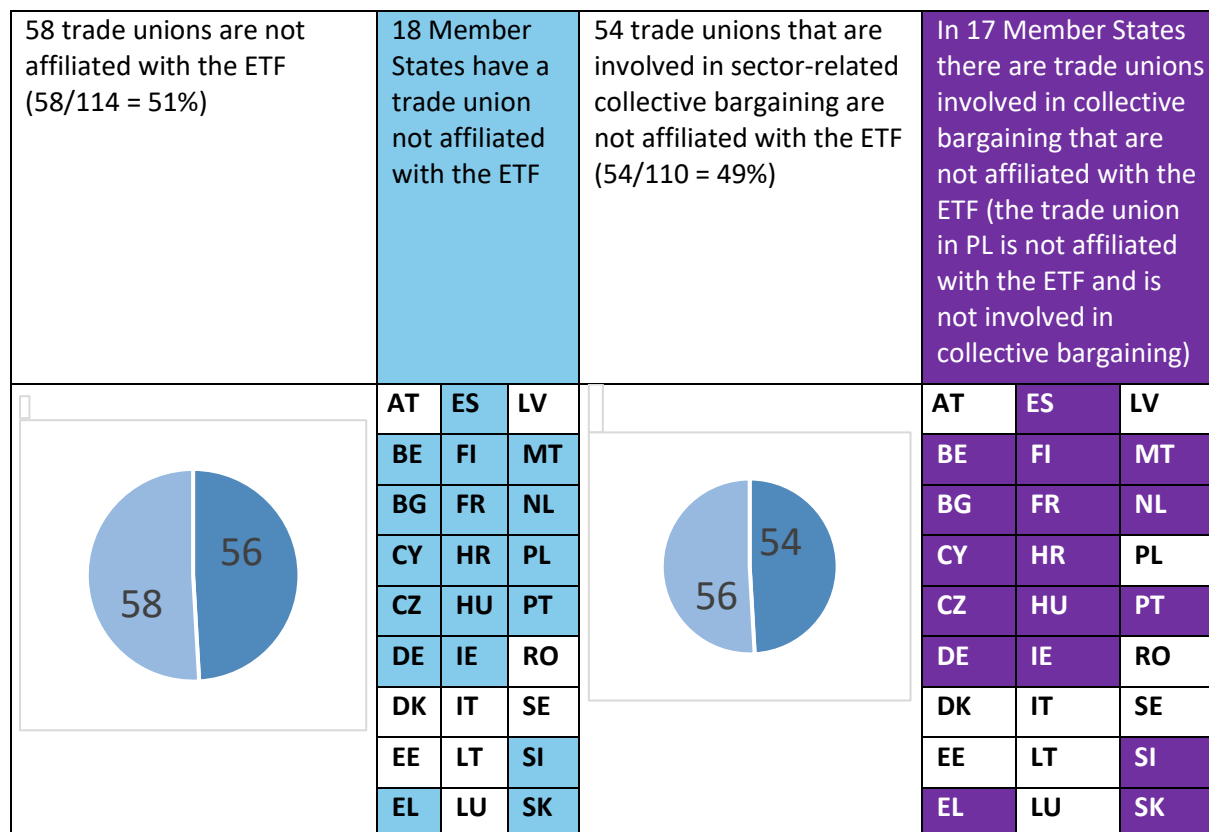
#### 3.4.1. Sector-relatedness and membership strength of trade unions not affiliated with the ETF

As shown in Figure 13 and Table 48, of the 114 sector-related unions in the EU27, 58 are not affiliated with the ETF. Taken together, they organise around 86,000 workers in the sector, that is, around 11% of the 753,000 unionised workers in the sector. This contrasts with around 643,000 workers affiliated with ETF members.

In terms of sector coverage, 45 non-affiliated unions organise workers in urban and suburban transport (NACE 49.31), 49 unions organise workers in taxi operations (NACE 49.32), 48 unions organise workers in passenger road transport (NACE 49.39), 52 unions organise workers in freight road transport (NACE 49.41) and 34 unions organise workers in removal services (NACE 49.92) (Table 48).



Figure 13: Scoreboard providing data on the national sectoral trade unions not affiliated with the ETF



	Urban public transport	Rest of road transport	Whole road transport	Source
Total number of members in trade unions not affiliated with the ETF	50,229	36,034	86,263	Table 48
Total number of members of all trade unions in the sector	356,514	398,216	754,730	Table 15
Total number of workers in the sector	1,285,323	3,790,233	5,075,556	Table 2
Proportion of all trade union members, %	14.09	9.05	11.43	
Proportion of all workers in the sector, %	3.91	0.95	1.70	
Member States where none of the trade unions is affiliated with the ETF	4: CY, EL, HR, PT			
Member States where the largest sectoral trade union for urban public transport is not affiliated with the ETF	7: CY, EL, HR, MT, PL, PT, SI			
Member States where the largest sectoral trade union for the rest of road transport is not affiliated with the ETF	5: CY, EL, HR, PT, SI			

Table 48: Sector-relatedness of trade unions not affiliated with the ETF

Member State	Trade union	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.31, 49.32)	Size ranking in the rest of road transport (NACE 49.31, 49.32)	Organises members in the following sectors?				
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)
<b>Total</b>	<b>58</b>	<b>50,229</b>		<b>36,034</b>		<b>45</b>	<b>49</b>	<b>48</b>	<b>52</b>	<b>34</b>
BE	ABVV-FGTB BBTK-SETCa (rest of road transport)	No members		No data				Yes	Yes	Yes
BG	SJB (urban public transport)	120	3	No members		Yes				
CY	Segdamelin – PEO (whole road transport)	450	2	60	2	Yes	Yes	Yes	Yes	
CY	FTPAAW – SEK (whole road transport)	500	1	250	1	Yes	Yes	Yes	Yes	
CZ	OS DOSIA (whole road transport)	8,125	1	8,125		Yes	Yes	Yes	Yes	
DE	NahVG	5,000	2	No members						
EL	OSME (whole road transport)	No data	1	No data	1	Yes	Yes	Yes	Yes	Yes
EL	POS-MET (urban public transport)	7,460	2	No members		Yes				
EL	Union of Employees and Subsidiary Companies of OASA (urban public transport)	3,300	3	No members		Yes				
EL	Seoasth (urban public transport)	1,300	4	No members		Yes				

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.31, 49.32)	Size ranking in the rest of road transport (NACE 49.31, 49.32)	Organises members in the following sectors?				
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)
EL	Union of OASA Employees (urban public transport)	110	8	No members		Yes				
EL	SELMA (urban public transport)	850	5	No members		Yes				
EL	Union of STASY Employees (former Union of HSAP Employees) (urban public transport)	380	6	No members		Yes				
EL	SET (urban public transport)	310	7	No members		Yes				
ES	CIG (whole road transport)	No data		No data		Yes	Yes	Yes	Yes	Yes
ES	SIT (urban public transport)	1,100		No members		Yes				
ES	SLT (urban public transport)	No data		No members		Yes				
ES	ELA (urban public transport)	No data		No members		Yes				
ES	LAB (urban public transport)	No data		No members		Yes				
ES	USO (urban public transport)	No data		No members		Yes				
ES	CUT-Aragón (urban public transport)	No data		No members		Yes				
ES	CSIF (urban public transport)	No data		No members		Yes				
ES	Plataforma Sindical – EMT (urban public transport)	No data		No members		Yes				

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.31, 49.32)	Size ranking in the rest of road transport (NACE 49.31, 49.32)	Organises members in the following sectors?				
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)
ES	SCMM (urban public transport)	No data		No members		Yes				
ES	SU Metro (urban public transport)	No data		No members		Yes				
ES	SO Metro (urban public transport)	No data		No members		Yes				
FI	PAM	No members		294		Yes				
FR	CFE-CGC Transports	No data		8,000		Yes	Yes	Yes	Yes	Yes
FR	UNSA Transports	No data		No data		Yes	Yes	Yes	Yes	Yes
FR	UST Transports	No data		No members		Yes	Yes	Yes	Yes	Yes
HR	SHV (whole road transport)	300	3	1,100	2	Yes	Yes	Yes	Yes	Yes
HR	SZH-ZET (urban public transport)	500	1	No members		Yes				
HR	SVPRZZ (urban public transport)	350	2	No members		Yes				
HR	SPIVH (rest of road transport)	No members		1,200	1		Yes		Yes	
HR	USVPRH (rest of road transport)	No members		900	3		Yes		Yes	
HU	TESZ (rest of road transport)	No members		2,005	1		Yes		Yes	
HU	KKSZ (rest of road transport)	No members		2,000	2		Yes		Yes	
HU	Metro KDSZ	1,100								
IE	NBRU (whole road transport)	3,900	2	No data						

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.31, 49.32)	Size ranking in the rest of road transport (NACE 49.31, 49.32)	Organises members in the following sectors?				
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)
IE	Connect (urban public transport)	150	4	No members						
MT	UHM	694	1	No members		Yes				
NL	De Unie	No members		2,000	3		Yes		Yes	
PL	KS KM NSZZ 'Solidarność'	6,004	1	No members		Yes				
PL	ZZPKMwRP (urban public transport)	2,800	2	No members		Yes				
PT	Fectrans (whole road transport)	1,500	1	8,000	1	Yes	Yes	Yes	Yes	Yes
PT	SITRA (whole road transport)	1,000	2	3,500	3	Yes	Yes	Yes	Yes	Yes
PT	SNMOT (whole road transport)	900	3	4,000	2	Yes	Yes	Yes	Yes	Yes
PT	STRUN (whole road transport)	400	6	2,000	4	Yes	Yes	Yes	Yes	Yes
PT	Sttamp (whole road transport)	300	7	300						
PT	SMAQ (urban public transport)	600	4	No members		Yes				
PT	ASPTC	500	5	No members		Yes				
PT	SSTM (urban public transport)	200	8	No members		Yes				
PT	SMTP (urban public transport)	170	9	No members		Yes				
PT	SIMM (rest of road transport)	No members		200	6		Yes		Yes	

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Number of members in urban public transport (NACE 49.31, 49.32)	Size ranking in urban public transport (NACE 49.31, 49.32)	Number of members in the rest of road transport (NACE 49.31, 49.32)	Size ranking in the rest of road transport (NACE 49.31, 49.32)	Organises members in the following sectors?				
						Urban and suburban passenger land transport (NACE 49.31)	Taxi operation (NACE 49.32)	Other passenger land transport (NACE 49.39)	Freight transport by road (NACE 49.41)	Removal services (NACE 49.92)
PT	Simpper (rest of road transport)	No members		100	7		Yes		Yes	
SI	SV LPP (whole road transport)	56	3		3	Yes	Yes	Yes	Yes	
SI	KS-90 – SVAS (whole road transport)	1,000	1		1	Yes	Yes	Yes	Yes	
SK	IOZ (urban public transport)	3,800	2	No members		Yes				

### 3.4.2. Position in the industrial relations landscape of the trade unions not affiliated with the ETF

Table 49 sets out the position in the industrial relations landscape and collective bargaining processes of the trade unions not affiliated with the ETF. Fifty-one trade unions are considered as representative at national level, 31 are involved in social dialogue activities, 47 are consulted by the government on sector-related matters, 54 are involved in collective bargaining processes (at either sector or company level or both) and 12 have been involved in industrial action in the sector in the past three years. Finally, one trade union is affiliated with another European organisation, the International Union of Professional Drivers (Union Internationale des Chauffeurs Routiers, UICR).

Table 49: Position of the trade unions not affiliated with the ETF in the industrial relations landscape of the whole road transport sector at Member State level

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	Involved in industrial action in the sector in the past three years?	Affiliated with other European associations?
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport activities (NACE 49.39, 49.41, 49.92)						
<b>Total</b>	<b>58</b>	<b>17</b>	<b>50</b>	<b>25</b>	<b>51</b>	<b>31</b>	<b>47</b>	<b>54</b>	<b>12</b>	<b>1</b>
BE	ABVV-FGTB BBTk-SETCa (rest of road transport)			Yes	Yes	Yes	Yes	Yes		
BG	SJB (urban public transport)		Yes		Yes	Yes	Yes	Yes		
CY	Segdamelin – PEO (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes	
CY	FTPAAW – SEK (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes		
CZ	OS DOSIA (whole road transport)	Yes	Yes	Yes	Yes			Yes	Yes	
DE	NahVG (urban public transport)		Yes		Yes		Yes	Yes	Yes	CESI indirectly
EL	OSME (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
EL	POS-MET (urban public transport)		Yes		Yes		Yes	Yes		

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	Involved in industrial action in the sector in the past three years?	Affiliated with other European associations?
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport activities (NACE 49.39, 49.41, 49.92)						
EL	Union of Employees and Subsidiary Companies of OASA (urban public transport)		Yes		Yes		Yes	Yes		
EL	Seoasth (urban public transport)		Yes		Yes		Yes	Yes		
EL	Union of OASA Employees urban public transport		Yes		Yes		Yes	Yes		
EL	SELMA (urban public transport)		Yes		Yes		Yes	Yes		
EL	Union of STASY Employees (former Union of HSAP Employees) (urban public transport)		Yes		Yes		Yes	Yes		
EL	SET (urban public transport)		Yes		Yes		Yes	Yes		
ES	CIG (whole road transport)	Yes	Yes	Yes			Yes	Yes		
ES	SIT (urban public transport)		Yes		Yes	Yes		Yes		
ES	SLT (urban public transport)		Yes		Yes	Yes		Yes		
ES	ELA (urban public transport)		Yes		Yes	Yes	Yes	Yes		
ES	LAB (urban public transport)		Yes		Yes	Yes	Yes	Yes		



Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	Involved in industrial action in the sector in the past three years?	Affiliated with other European associations?
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport activities (NACE 49.39, 49.41, 49.92)						
ES	USO (urban public transport)		Yes		Yes	Yes	Yes	Yes		
ES	CUT-Aragón (urban public transport)		Yes		Yes	Yes	Yes	Yes		
ES	CSIF (urban public transport)		Yes		Yes	Yes	Yes	Yes		
ES	Plataforma Sindical – EMT (urban public transport)		Yes				Yes	Yes		
ES	SCMM (urban public transport)		Yes				Yes	Yes		
ES	SU Metro (urban public transport)		Yes				Yes	Yes		
ES	SO Metro (urban public transport)		Yes				Yes	Yes		
FI	PAM (rest of road transport)			Yes	Yes		Yes	Yes		
FR	CFE-CGC Transports	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
FR	UNSA Transports	Yes	Yes	Yes				Yes		
FR	UST Transports		Yes					Yes		
HR	SHV (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	UICR
HR	SZH-ZET (urban public transport)		Yes		Yes	Yes	Yes	Yes		

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	Involved in industrial action in the sector in the past three years?	Affiliated with other European associations?
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport activities (NACE 49.39, 49.41, 49.92)						
HR	SVPRZZ (urban public transport)		Yes		Yes	Yes	Yes	Yes		
HR	SPIVH (rest of road transport)			Yes	Yes	Yes	Yes	Yes		
HR	USVPRH (rest of road transport)			Yes	Yes	Yes	Yes	Yes		
HU	Metró KDSZ (urban public transport)		Yes		Yes			Yes		
HU	TESZ (rest of road transport)			Yes	Yes	Yes	Yes	Yes		
HU	KKSZ (rest of road transport)			Yes	Yes	Yes		Yes		
IE	NBRU (whole road transport)	Yes	Yes	Yes	Yes	Yes		Yes		
IE	Connect (urban public transport)		Yes		Yes	Yes	Yes	Yes		
MT	UHM (urban public transport)		Yes		Yes	Yes		Yes		
NL	De Unie (rest of road transport)			Yes	Yes	Yes	Yes	Yes	Yes	
PL	OPZZ (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes			Yes
PL	ZZPKMwRP (urban public transport)		Yes		Yes	Yes	Yes			
PT	Fectrans (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
PT	SITRA (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	Involved in industrial action in the sector in the past three years?	Affiliated with other European associations?
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport activities (NACE 49.39, 49.41, 49.92)						
PT	SNMOT (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
PT	STRUN (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
PT	Sttamp (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
PT	SMAQ (urban public transport)		Yes		Yes	Yes	Yes	Yes		
PT	ASPTC		Yes		Yes		Yes	Yes		
PT	STTM (urban public transport)		Yes		Yes		Yes	Yes		
PT	SMTP (urban public transport)		Yes		Yes		Yes	Yes		
PT	SIMM (rest of road transport)		Yes		Yes		Yes	Yes		
PT	Simmper (rest of road transport)			Yes	Yes					
SI	SV LPP (whole road transport)	Yes	Yes	Yes	Yes				Yes	
SI	KS-90 – SVAS (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes	
SK	IOZ (urban public transport)		Yes		Yes	Yes	Yes	Yes		

**Note:** CESI, European Confederation of Independent Trade Unions.

### 3.5. Employer organisations/business associations not affiliated with the IRU or UITP

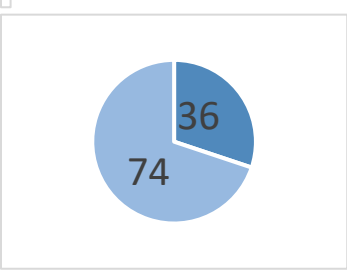
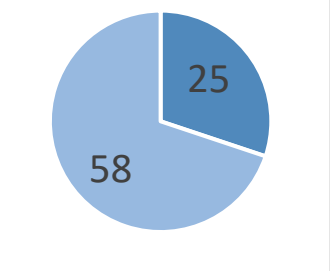
In this section, analysis is undertaken to describe the sector-related employer organisations/business associations that are not affiliated with the IRU or UITP. This sheds light on the employer organisations/business associations in the sector that are currently not represented in the ESSDC. The analysis below provides an overview of, first, their number and their sectoral coverage and, second, their position in the industrial relations landscape in their national contexts.

#### 3.5.1. Sector-relatedness and membership strength of employer organisations/business associations not affiliated with the IRU or UITP

In total, the study identified 36 employer organisations/business associations not affiliated with either the IRU or the UITP in 17 Member States (Austria, Belgium, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Lithuania, Malta, the Netherlands, Poland, Portugal, Slovakia, Spain and Sweden) (Figure 14). Of these, 18 employer organisations/business associations operate in urban public transport activities (NACE 49.31 and 49.32) (Table 50) and 18 employer organisations/business associations operate in the rest of road transport (NACE 49.39, 49.41 and 49.92) (Table 51).

Thirty-three employer organisations are considered representative at national level and 23 participate in collective bargaining processes at either sectoral or company level or both (see Tables 52 and 53).

Figure 14: Scoreboard illustrating the representativeness of employer organisations/business associations not affiliated with the IRU or UITP

33% of employer organisations/business associations with members in the road transport sector are not affiliated with the IRU/UITP (36/110)	17 Member States have employer organisations/business associations not affiliated with the IRU/UITP	28% of employer organisations involved in sector-related collective bargaining are not affiliated with the IRU/UITP (23/83)	In 26 Member States, the IRU and/or UITP have a member involved in collective bargaining at either sectoral or company level																																																						
	<table border="1" data-bbox="563 672 770 1164"> <tr><td>AT</td><td>ES</td><td>LV</td></tr> <tr><td>BE</td><td>FI</td><td>MT</td></tr> <tr><td>BG</td><td>FR</td><td>NL</td></tr> <tr><td>CY</td><td>HR</td><td>PL</td></tr> <tr><td>CZ</td><td>HU</td><td>PT</td></tr> <tr><td>DE</td><td>IE</td><td>RO</td></tr> <tr><td>DK</td><td>IT</td><td>SE</td></tr> <tr><td>EE</td><td>LT</td><td>SI</td></tr> <tr><td>EL</td><td>LU</td><td>SK</td></tr> </table>	AT	ES	LV	BE	FI	MT	BG	FR	NL	CY	HR	PL	CZ	HU	PT	DE	IE	RO	DK	IT	SE	EE	LT	SI	EL	LU	SK		<table border="1" data-bbox="1137 672 1394 1164"> <tr><td>AT</td><td>ES</td><td>LV</td></tr> <tr><td>BE</td><td>FI</td><td>MT</td></tr> <tr><td>BG</td><td>FR</td><td>NL</td></tr> <tr><td>CY</td><td>HR</td><td>PL</td></tr> <tr><td>CZ</td><td>HU</td><td>PT</td></tr> <tr><td>DE</td><td>IE</td><td>RO</td></tr> <tr><td>DK</td><td>IT</td><td>SE</td></tr> <tr><td>EE</td><td>LT</td><td>SI</td></tr> <tr><td>EL</td><td>LU</td><td>SK</td></tr> </table>	AT	ES	LV	BE	FI	MT	BG	FR	NL	CY	HR	PL	CZ	HU	PT	DE	IE	RO	DK	IT	SE	EE	LT	SI	EL	LU	SK
AT	ES	LV																																																							
BE	FI	MT																																																							
BG	FR	NL																																																							
CY	HR	PL																																																							
CZ	HU	PT																																																							
DE	IE	RO																																																							
DK	IT	SE																																																							
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BG	FR	NL																																																							
CY	HR	PL																																																							
CZ	HU	PT																																																							
DE	IE	RO																																																							
DK	IT	SE																																																							
EE	LT	SI																																																							
EL	LU	SK																																																							
In Cyprus, there is no employer organisation																																																									
	Urban public transport	Rest of road transport	Whole road transport	Source																																																					
Total number of members in employer organisations not affiliated with the IRU/UITP	3,480	50,525	54,005	Tables 50 and 51																																																					
Total number of members of all employer organisations in the sector	62,768	238,065	300,833	Table 18																																																					
Total number of companies in the sector	284,472	548,774	846,802 <sup>44</sup>	Table 3																																																					
Proportion of all employer organisation members, %	5.54	21.22	17.95																																																						
Proportion of all companies in the sector, %	1.22	9.21	6.38																																																						
Member States where the largest sectoral employer organisation/business association is not affiliated with the IRU/UITP	0																																																								

<sup>44</sup> The sub totals of previous two columns add up to less than 846,802 due to several companies counted in several categories.

## Representativeness of the European social partner organisations: Road transport sector

Table 50: Sector-relatedness of employer organisations/business associations not affiliated with the IRU or UITP in urban public transport activities

Member State	Employer organisation/business association	Members in urban public transport activities (NACE 49.31, 49.32)	Members in urban and suburban passenger land transport (NACE 49.31)	Members in taxi operation (NACE 49.32)	Companies with >250 employees	Companies with 50–249 employees	Companies with 10–49 employees	Companies with <10 employees
<b>Total</b>	<b>18</b>	<b>3,480</b>						
DE	VKA	212 public employers active in urban public transport and ports	VKA does not raise numbers by single NACE codes. Therefore, only figures for all employers are available					
DE	AVN	71	71	0	29	35	6	1
DK	KL	Only NACE 49.31	3 local rails	0	3	0	0	0
ES	Antaxi		53 (regional organisations)		0	0	0	100% (of all the companies' members)
FI	Taksiliikenteen Työnantajat ry	36		36	0	0	0	36
FI	KT	2	2		2			
FR	CSNERT			Yes, but no data on the number of companies				
FR	FNTI			Yes, but no data on the number of companies				
FR	FNAT				Yes, but no data on the number of companies			
FR	FNDT			Yes, but no data on the number of companies				
FR	UNT			Yes, but no data on the number of companies				
HU	OTSZ			More than 100		50	20–25	25–30
IT	AGENS							

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/business association	Members in urban public transport activities (NACE 49.31, 49.32)	Members in urban and suburban passenger land transport (NACE 49.31)	Members in taxi operation (NACE 49.32)	Companies with >250 employees	Companies with 50–249 employees	Companies with 10–49 employees	Companies with <10 employees
NL	VWOV	6	6	0 (this is done by KNV)	6	0	0	0
PL	FOT	26	26	n.a.	n.a.	n.a.	n.a.	
PT	Antral	Approximately 3,000	Close to zero	Approximately 3,000 associates (according to Antral)				Close to 3,000
SE	Almega – Tågföretagen (Swedish Train Operating Companies)	70	70	0				
SK	UDPaT	1	1	0	1			

Table 51: Sector-relatedness of employer organisations/business associations not affiliated with the IRU and UITP in the rest of road transport

Member State	Employer organisation/business association	Members	Companies with >250 employees	Companies with 50–249 employees	Companies with 10 to 49 employees	Companies with <10 employees	Proportion of the sectoral workforce
<b>Total</b>	<b>18</b>	<b>50,525</b>					
AT	FVS	607	12	71	115	316	20–30%
BE	BKV-CBD	98					Relatively little (only responsible for movers within the sectors)
BE	TLV	1,400				Unknown but a significant proportion are single drivers	Unknown
BE	UPTR	2,350				Unknown but a significant proportion are single drivers	Unknown
BE	WF-FE	518					
ES	Fenadismer	22,000	Less than 1%	1%	5%	94%	60,000 workers
FI	LAL	156	No data	No data	No data	No data	About 30%. According to LAL, there are 519 bus companies in Finland
FR	Union TLF						According to the employer organisation, it represents 188,848 employees
FR	OTRE	2,927	25	170	1,306	1,426	Member companies have nearly 68,000 employees
HU	N.i.T.	4,762	4 (estimation)	25 (estimation)	4,000 (estimation)	733 (estimation)	34,000
HU	Fuvosz	1,210	0	4	40–50	1,160	2.5% (estimation)
IE	FTAI	32					25,000
IT	ANITA	1,700					90,000 employees (according to the organisation's website)
LT	TTLA	25	25	0	0	0	Approximately 50%



## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/business association	Members	Companies with >250 employees	Companies with 50–249 employees	Companies with 10 to 49 employees	Companies with <10 employees	Proportion of the sectoral workforce
MT	MEA	20	0	0	Yes, but no further data are available	Yes, but no further data are available	25%
NL	VVT	170	5	75	63	27	5%
PL	Pracodawcy RP	2,480	33	234	919	1,104	n.a.
SE	STBF	70	0	45,323	20	48	Approximately 60–65% of the total workforce within the tourist bus and coach subsector

Table 52: Employer organisations/business associations not affiliated with the IRU/UITP in the industrial relations landscape at Member State level in urban public transport activities

Member State	Employer organisation/business association	Considered representative?	Basis of representativeness	Involved in sector-related social dialogue?	Involved in sector collective bargaining?	Involved in company collective bargaining?	Involved in collective bargaining in NACE 49.31?	Involved in collective bargaining in NACE 49.32 (taxi operations)?	Involved in collective bargaining in ride handling?	Involved in collective bargaining in the bus sector?
<b>Total</b>	<b>18</b>	<b>17</b>		<b>10</b>	<b>14</b>	<b>5</b>	<b>6</b>	<b>9</b>	<b>6</b>	<b>5</b>
DE	VKA	Yes	Mutual recognition	No standing committee/body. However, VKA is asked to provide position papers on sector-related matters by the federal government or as part of the legislative process in Germany	Yes		Yes			Yes
DE	AVN	Yes	Mutual recognition	No standing social dialogue body	Yes	Yes	Yes			Yes
DK	KL	Yes	Mutual recognition	Yes, tripartite	Yes	Yes		Yes		
ES	Antaxi	Yes	Legal	Yes, tripartite	Yes			Yes		
FI	Taksiliikenteen Työnantajat ry	Yes	Mutual recognition		Yes			Yes		
FI	KT	Yes	Mutual recognition		Yes		Yes			Yes

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Considered representative?	Basis of representativeness	Involved in sector-related social dialogue?	Involved in sector collective bargaining?	Involved in company collective bargaining?	Involved in collective bargaining in NACE 49.31?	Involved in collective bargaining in NACE 49.32 (taxi operations)?	Involved in collective bargaining in ride handling?	Involved in collective bargaining in the bus sector?
FR	CSNERT	Yes	Legal	Yes, bipartite	Yes			Yes	Yes	
FR	FNTI	Yes	Legal	Yes, bipartite	Yes			Yes	Yes	
FR	FNAT	Yes	Legal	Yes, bipartite	Yes	Yes		Yes	Yes	
FR	FNDT	Yes	Legal	Yes, bipartite	Yes			Yes	Yes	
FR	UNT	Yes	Legal	Yes, bipartite	Yes			Yes	Yes	
HU	OTSZ	Yes	Mutual recognition	Yes, bipartite		Yes				
IT	AGENS	Yes	Mutual recognition				Yes		Yes	Yes
NL	VWVOV	Yes	Mutual recognition	Yes, bipartite	Yes		Yes			Yes
PL	FOT	Yes	Mutual recognition							
PT	Antral	Yes	Mutual recognition	There are no social dialogue bodies	Yes	Yes		Yes		
SE	Almega – Tågföretagen (Swedish Train Operating Companies)	Yes	Mutual recognition	There are no social dialogue bodies	Yes		Yes			
SK	UDPaT	No information available now		Yes, tripartite indirectly via AZZZ SR	No information available now	No information available now				

Table 53: Employer organisations/business associations not affiliated with the IRU/UITP in the industrial relations landscape at Member State level in the rest of road transport

Member State	Employer organisation/ business association	Considered representative?	Basis of representativeness	Involved in social dialogue?	Involved in paritarian sectoral organisations?	Consulted by the government?	Involved in collective bargaining at sectoral level?	Involved in collective bargaining at company level?
<b>Total</b>	<b>18</b>	<b>16</b>		<b>15</b>	<b>8</b>	<b>16</b>	<b>8</b>	<b>4</b>

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Considered representative?	Basis of representativeness	Involved in social dialogue?	Involved in paritarian sectoral organisations?	Consulted by the government?	Involved in collective bargaining at sectoral level?	Involved in collective bargaining at company level?
AT	FVS	Yes	Legal	Yes, tripartite			Yes	
BE	BKV-CBD	Yes	Legal/statutory	Yes, bipartite	Yes	Yes, regularly	Yes	Only advice
BE	TLV	Yes	Legal/statutory	Yes, bipartite	Yes	Yes, regularly	Yes	Only advice
BE	UPTR	Yes	Legal/statutory	Yes, bipartite	Yes	Yes, regularly	Yes	Only advice
BE	WF-FE	Yes	Legal/statutory	Yes, bipartite	Yes	Yes, regularly	Yes	Yes
ES	Fenadismer	Yes	Legal/statutory	Yes, bipartite		Yes, regularly		
FI	LAL	Yes	Mutual recognition			Yes, unknown how		
FR	Union TLF	Yes	Legal/statutory	Yes, bipartite	Yes	Yes, regularly	Yes	
FR	OTRE	Yes	Legal/statutory	Yes, bipartite	Yes	Yes, regularly	Yes	
HU	N.i.T.	Yes	Legal/statutory	Yes, bipartite		Yes, ad hoc		
HU	Fuvosz		Legal/statutory	Yes, bipartite		Yes, regularly		
IE	FTAI							
IT	ANITA	Yes	Mutual recognition	Yes	Yes	Yes, although unknown how <sup>45</sup>		
LT	TTLA	Yes	Mutual recognition	Yes, tripartite		Yes, ad hoc		
MT	MEA	Yes	Legal	Yes, both		Yes, ad hoc		
NL	VVT	Yes	Mutual recognition	Yes, bipartite	Yes	Yes, regularly	Yes	
PL	Pracodawcy RP	Yes	Legal/statutory	Yes, tripartite		Yes, ad hoc		
SE	STBF	Yes	Mutual recognition	There are no social dialogue bodies		Yes, ad hoc		

<sup>45</sup> <https://www.mit.gov.it/comunicazione/news/autotrasporto-incontro-tsalvini-tecnici-ministero-e-delegazioni-autotrasporto>.

### 3.6. Other European associations with affiliates in the sector

In this section, we assess the presence of other European-level associations in the sector and the extent to which the sectoral trade unions and employer organisations/business associations are associated with other European-level organisations, in addition to the ETF (on the worker side) and the IRU and UITP (on the employer side).

On the worker side, as also shown in Table 16 in Section 2.2, of the 114 sector-related unions, 56 unions are affiliated with the ETF in 23 Member States and four unions are affiliated with other European associations in four Member States.

Further information about the four sector-related unions that are affiliated with other European associations is provided in Table 54. These four unions belong to different European organisations, namely CESI, the UICR, the ITF, the ETUI, IndustriAll Europe and the Federation of European Train Drivers' Unions (ALE). One union (SIPTU in Ireland) is also a member of the ETF, alongside its membership of other European associations. All four of these unions are considered representative and are involved in sectoral collective bargaining, social dialogue and consultations with the government.

On this basis, it can be concluded that European organisations other than ETF have a small presence among the sectoral trade unions. For CESI, its role is limited to public sector trade unions organising some employees in urban public transport activities.

The UICR is a federation of national professional drivers' associations, with professional associations from 15 Member States (Austria, Belgium, Bulgaria, Estonia, Finland, France, Germany, Hungary, Italy, Ireland, the Netherlands, Poland, Slovakia, Slovenia and Spain). The UICR is a European professional association, not a trade union organisation.

Table 54: Sectoral trade unions associated with European-level organisations other than the ETF

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	ETF member?	Affiliated with other European associations?
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)						
<b>Total of all sector trade unions</b>	<b>114</b>	<b>54</b>	<b>47</b>	<b>13</b>	<b>102</b>	<b>64</b>	<b>100</b>	<b>107</b>	<b>56</b>	<b>4</b>
<b>Number of Member States</b>	<b>27</b>	<b>26</b>	<b>20</b>	<b>9</b>	<b>27</b>	<b>21</b>	<b>27</b>	<b>27</b>	<b>23</b>	<b>4</b>
DE	NahVG		Yes		Yes	Yes	Yes	Yes		CESI (indirect, via Deutscher Beamtenbud)
HR	SHV	Yes			Yes	Yes	Yes	Yes		UICR
IE	SIPTU	Yes			Yes	Yes	Yes	Yes	Yes	ITF, ETUI, IndustriAll Europe
PT	SMAQ (urban public transport)		Yes		Yes	Yes	Yes	Yes		ALE

On the employer side, as also shown in Table 19 in Section 2.4, of the 110 sector-related employer organisations/business associations, 10 are associated with European associations other than the IRU and UITP in seven Member States.

Further information about these 10 employer organisations/business associations is provided in Table 55. Three employer organisations/business associations are associated with the European Road Hauliers Association (UETR), two are associated with the Community of European Railway and Infrastructure Companies (CER) and single employer organisations/business associations are associated with the European Federation of Locks and Building Hardware Manufacturers (ARGE) and Logcom (the same member); the European Movers Federation (Fedemac); the European Transport Training Association (Eurotra) and the European Road Safety Charter (ERSC) (the same member); CORTE; and ECTA and Clecat (the same member). Among these 10 employer organisations/business associations, two are also members of the IRU and one is a member of the UITP.

All such organisations are considered representative and are involved in sectoral collective bargaining, social dialogue and consultations with the government.

On this basis, it can be concluded that European organisations other than the IRU and UITP have a small presence among the sectoral employer organisations/business associations.

Table 55: Sectoral employer organisations/business associations associated with European-level organisations other than the IRU and UITP

Member State	Employer organisation	Organises companies in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	IRU/UITP member?	Affiliated with other European associations?
		Whole road transport sector (NACE 49.31, 49.32, 49.39, 49.41, 49.92)	Urban public transport activities (NACE 49.31, 49.32)	Rest of road transport (NACE 49.39, 49.41, 49.92)						
<b>Total of all sector employer organisations</b>	<b>110</b>			<b>46</b>	<b>80</b>	<b>73</b>	<b>93</b>	<b>83</b>	<b>77</b>	<b>10</b>
<b>Number of Member States</b>	<b>26</b>			<b>23</b>	<b>25</b>	<b>25</b>	<b>26</b>	<b>26</b>	<b>25</b>	<b>7</b>
AT	FVGB			Yes	Yes	Yes	Yes	Yes	IRU	ARGE, Logcom
AT	FVSB				Yes	Yes	Yes	Yes	UITP	CER
BE	BKV-CBD (rest of road transport)			Yes	Yes	Yes	Yes	Yes		Fedemac
BE	TLV (rest of road transport)			Yes	Yes	Yes	Yes	Yes		UETR
BE	UPTR (rest of road transport)			Yes	Yes	Yes	Yes	Yes		UETR
ES	Fenadismer (rest of road transport)			Yes	Yes	Yes	Yes	Yes		UETR
HU	N.i.T. (rest of road transport)			Yes	Yes	Yes	Yes	Yes		Eurotra, ERSC
LT	TTLA (rest of road transport)			Yes	Yes	Yes	Yes	Yes		CORTE
NL	TLN (rest of road transport)			Yes	Yes	Yes	Yes	Yes	IRU	ECTA, Clecat
SE	Almega Tågföretagen (urban public transport)				Yes	Yes	Yes	Yes		CER

UETR has associations affiliated from seven Member States (Belgium, Croatia, France, Germany, Italy, Portugal and Spain). Fedemac has affiliates in 25 Member States (all Member States except Cyprus and Lithuania). Eurotra aims to exchange knowledge and best practices among drivers and managers and has affiliates in 10 Member States (Belgium, Czechia, Denmark, Finland, France, Hungary, Poland, Romania, Spain and Sweden). The ERSC is not an organisation but an EU initiative to which companies can adhere. CORTE is an informal group of experts from national authorities, national associations and companies that cooperate on research, rules and smart enforcement methods. ECTA has member companies from all Member States. Clecat organises multimodal freight forwarders in logistics, not only in road transport, and has national associations affiliated in 14 Member States (Bulgaria, Denmark, France, Germany, Hungary, Ireland, Italy, the Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain and Sweden).

### 3.7. Mandate to negotiate for the ETF, IRU and UITP

One of the criteria stated in Article 1 of Decision 98/500/EC states that the organisations representing both workers and employers:

*... shall consist of organisations which are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States.*<sup>46</sup>

The European sectoral social partners should hence be able to prove their capacity to negotiate on behalf of their members and to enter 'contractual relations, including agreements' (Article 155 of the TFEU), namely the capacity to commit themselves and their national affiliates. Negotiating other types of joint texts (such as joint opinions, frameworks of action and guidelines) – however valuable they may be – is not considered to be sufficient for the mapping exercise of this report, that is, the capacity to negotiate agreements.

The mandate will be described in terms of the conditions and procedure for the European social partner organisation to be given the authorisation to enter a specific negotiation, as well as for the ratification of a possible agreement. If no such formal mandating procedure can be identified, it should be considered that the condition concerned is not fulfilled.

A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates or if it can receive such a mandate in accordance with a given mandating procedure. In the English version, the criterion to 'have the capacity to negotiate agreements' may be read as referring to associations at national level, whereas, in the French, German and Italian versions, this requirement clearly refers to the EU-level social partners only.

Eurofound has applied the criterion of the 'capacity to negotiate' to both the EU-level partner associations and, in the bottom-up approach, the national associations in order to assess their relevance. Following these arguments, the standard Eurofound methodology for assessing the criteria of being an 'integral part of Member State industrial relations' and the 'capacity to negotiate' applies the 'capacity to negotiate agreements' to both EU and national levels.

At **national level**, the representative status of the member organisations (giving them the legitimate right to engage in negotiations to determine working conditions in collective bargaining or social dialogue) and the extent to which they are actually doing this is illustrated for the ETF in Table 30 in

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<sup>46</sup> 98/500/EC: Commission decision of 20 May 1998 on the establishment of sectoral dialogue committees promoting the dialogue between the social partners at European level (OJ L 225/27, 12 August 1998).



Section 3.1, for the IRU in Table 38 in Section 3.2 and for the UITP in Tables 45 and 46 in Section 3.3. There is also a breakdown by country in Annex 1.

The link between the negotiation capacity of the member organisations at national level and the European organisation they are affiliated with is also analysed in terms of the involvement of those member organisations in the activities and structures of the European association. This is illustrated for the ETF in Table 31 in Section 3.1, for the IRU in Table 39 in Section 3.2 and for the UITP in Table 47 in Section 3.3.

At **European level**, the mandate/mandating procedure can be either **statutory** (that is, laid down in the statutes, namely in the constitution of the organisation or annexed to it) or **non-statutory** (that is, laid down in secondary documents, such as rules of procedure, memoranda of understanding and/or ad hoc decisions by the governing bodies of the organisation). Finally, in the absence of the above procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in binding agreements in the past.

The mandate will be described in terms of the conditions and procedure for the European social partner organisation to be given the authorisation to enter a specific negotiation, as well as for the ratification of a possible agreement. If no such formal mandating procedure can be identified, it should be considered that the condition concerned is not fulfilled. European social partners will be asked to provide proof of their statutes or any other written documentation describing their mandate and capacity to negotiate, as well as of the ratification procedures in place.

The European social partners from the road transport sector were asked to provide copies of their statutes, together with any other documentation describing their mandate and capacity to negotiate, as well as the ratification of procedures in place. The ESSDC for road transport has issued around 40 texts to date. However, most of these are joint opinions (29) and declarations (7), namely process-oriented texts and not contractual agreements.

Table 56 summarises the situation of each European social partner of the road transport sector regarding their capacity to negotiate agreements. What follows is a more detailed assessment of the capacity to negotiate of the ETF, IRU and UITP, followed by a list of the joint opinions agreed (Table 57).

**Table 56: Negotiation capacity of European social partners in the road transport sector**

EU social partners	Availability of statutes	Statutory mandate?	Non-statutory mandate?	Intrinsic capacity to negotiate agreements?	Agreements signed in the sector
ETF	Publicly available	Yes	Yes	Yes	Binding agreements negotiated
IRU	Publicly available		Yes	Yes	Binding agreements negotiated
UITP	Publicly available			Yes	Only joint opinions

The **ETF** organises workers across the transport sector, including road transport and urban public transport, as well as in civil aviation, dockers, fisheries, inland waterways, logistics, maritime transport, railways and tourism. The ETF in its current form was established in 1999. The ETF has a Road Transport Section and an Urban Public Transport Committee, both of which have web pages dedicated to their social dialogue activities.

The ETF Road Transport Section meets at least twice per year to decide on its policies and discuss actions, projects and campaigns. The day-to-day functioning of the section is entrusted to the ETF Secretariat and the Road Section Steering Committee, which is elected every five years prior to the ETF Congress. The steering committee includes the Section President and the two Vice-Presidents, the Chairperson representing the ETF delegation in the Road and Logistics Sectoral Social Dialogue Committee at EU level, two members in charge of coordinating the section's passenger and freight activities, and the youth and women's representatives. Co-opted members are validated by the section as being part of the committee as and when a request comes in. The section is represented in the ETF Executive Committee by its elected President.

The ETF Urban Public Transport Committee was established in 2000 as a joint project of the ETF Road Transport Section and the ETF Railway Section. It meets once a year and is governed by the Chair and the steering committee whose members are elected every five years prior to the ETF Congress. The steering committee meets twice per year.

The latest ETF Constitution, amended in 2022, defines one of the ETF activities as 'Developing relations with European employers' organisations in order to establish sustainable social relations on the European level via social dialogue relevant Sectoral Social Dialogue Committees and promoting the establishment and consolidation of European Works Councils in the sectors of its competence' (Article 8; ETF, 2021). Rule VI establishes the Executive Committee as the main governing body between the ETF's Congresses. Rule VI, point 13, establishes that 'The Executive Committee shall oversee and be kept regularly informed about the start and progress of negotiations and conclusion of sectoral agreements between social partners in the EU.'

The ETF disposes of a statutory mandate proving its capacity to negotiate binding agreements. The latest version of the ETF Constitution (ETF, 2021) of 24–27 May 2022 contains two rules referring to negotiations. Rule 1, No. 8, stipulates that the ETF directs its activities towards:

*... developing relations with European employers' organisations in order to establish sustainable social relations on the European level via social dialogue and negotiations ensuring workers' representation in the relevant Sectoral Social Dialogue Committees and promoting the establishment and consolidation of European Works Councils in the sectors of its competence.*

However, Rule 1, No. 8, does not mention binding agreements. The ETF's statutory mandate becomes clearer when read in conjunction with Rule 6, No. 8, on the Executive Committee:

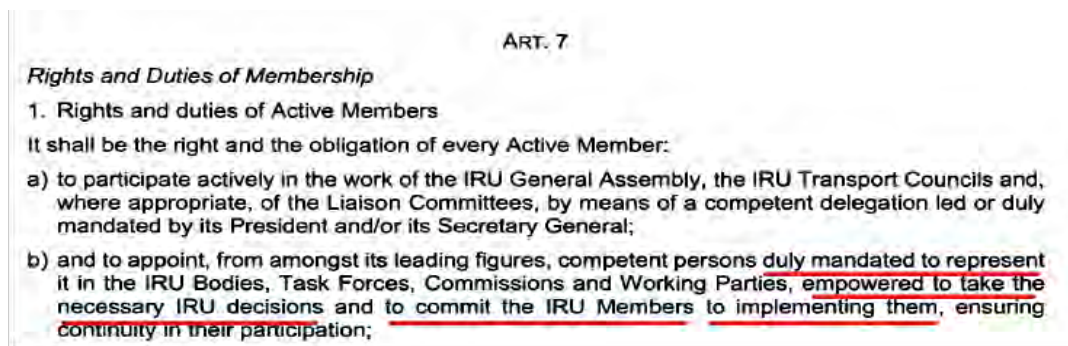
*The Executive Committee shall oversee and be kept regularly informed about the start and progress of negotiations and conclusion of sectoral agreements between social partners in the EU.*

The **IRU** was founded in 1948 in Geneva, Switzerland, as a global transport association. Its EU office has been recognised as an EU institutional partner since 1973. The EU IRU team works on two main areas – (1) advocacy and (2) research and innovation – to uphold the interests of operators of private buses, coaches, taxis, hired cars with drivers and trucks, as well as of the broader mobility and logistics industry. The IRU has a Passenger Transport Council, representing the professional transport of

passengers by road, including by taxis and hire cars with drivers, and a Goods Transport Council, representing the transport of goods by road. The IRU also has regional liaison committees and commissions, that is, at EU level, including a dedicated Commission on Social Affairs, which deals with social matters, including issues related to sectoral social dialogue.

The IRU's Constitution (IRU, 2021), adopted in 2021, defines, in Article 2, the objective of the IRU, namely to contribute to the development of domestic and international road transport and to safeguard the role of road transport for hire and reward and on own account. The IRU aims to study and solve or contribute to solving any problem pertaining directly or indirectly to road transport (Article 2a) and to represent the road transport industry to the public authorities and bodies or institutions (Article 2g), among other objectives.

Article 7 of the IRU Constitution clearly states the rights and obligations of IRU members, thus setting the statutory basis of the formal decision-making and IRU members' requirement to implement decisions taken, including within the framework of sectoral social dialogue.



The organisation of meetings and the decision-making of the liaison committees in Brussels are formalised, in particular, in Articles 5 (on the organisation of meetings) and 6 (on votes and decision-making) of the IRU Constitution. These articles state that decisions taken by members are mandatory and, thus, that the IRU and its members are committed to implementing them, including in matters related to sectoral social dialogue and any potential commitments and agreements thereof.

Considering the IRU Constitution and the IRU's rules of procedure, both adopted on 5 November 2021, as a global organisation the IRU does not explicitly have a statutory or a non-statutory mandate regarding sectoral social dialogue as such (IRU, 2021). However, according to the 'permanent part' of the official IRU Commission on Social Affairs Working Programme, which deals with social matters within the IRU, its main priorities are, among others, to 'endorse and manage negotiating mandates within the EU sectoral social dialogue, subject to final approval by the [Goods Transport Liaison Committee] and the [Passenger Transport Council]'. Thus, the IRU has a non-statutory mandate on the grounds of its permanent Commission on Social Affairs Working Programme.

During the Commission's second consultation on the communication on the organisation of working time in the sectors and activities (including road transport) excluded from Directive 93/104/EC, the IRU also displayed an intrinsic capacity to negotiate, as it entered negotiations with the FST (the Federation Syndicate Transport – the previous name of the ETF), which eventually failed in September 1998. However, the results of the negotiation were taken into account by the European Commission in its proposal for what has now become Directive 2002/15/EC on the working time of mobile workers. In addition, in 2008, the IRU and the ETF negotiated a joint agreement on re-introducing the 12-day derogation in Regulation (EC) No 561/2006 on driving and rest time rules, which was later taken over

and introduced formally by the EU legislators (European Parliament and Council) as an amendment to Regulation (EC) No 1073/2009.

The **UITP** was established in 1885 and has developed into a worldwide network to bring together public transport stakeholders and all sustainable transport modes. The UITP EU Committee is the decision-making body of the UITP concerning EU affairs. It represents the interests of European public transport undertakings towards the European institutions and is composed of national delegations representing public transport authorities and operators and members of the UITP. It holds three meetings per year in order to exchange views on European legislation and to define opinions, recommendations and positions. The UITP Europe Division gathers all UITP members from the European region to lead the sustainable mobility agenda in Europe. The objective is to discuss the latest trends and innovation in the advancement of public transport.

The UITP by-laws approved in 2022 (UITP, 2022) define the UITP’s objective as being ‘to carry out studies and give advice on any subjects relating to the collective transport of passengers, including shared mobility services, whether urban, suburban, regional or inter-regional on an international scale and to offer solutions with a view to helping this sector progress from a social, economic and technical point of view, for the benefit of all players concerned public and private’ (Article 3). Article 4 further defines a non-exhaustive list of UITP activities, including ‘to promote the interests of its Members and to represent them vis-à-vis other organisations’ (Article 4.1h), ‘to cooperate with and assist other initiatives and/or organisations having a purpose similar to the purpose of the Association, as well as other regional and/or international initiatives and/or organisations’ (Article 4.1j) and ‘to develop services aiming at promoting public transport and supporting the Members’ (Article 4.1n).

According to the UITP Constitution (by-laws) adopted on 18 June 2021 and its internal rules of 24 January 2020 (UITP, 2021), the UITP does not have a statutory or a non-statutory mandate. The UITP has also not displayed an intrinsic capacity to negotiate, as no agreements have been signed in the road transport sector to date. Article 4.1h of the UITP by-laws indicates that the organisation has the capacity to represent its members.

Table 57: Achievements in the road transport ESSDC, 1990–2024

ESSDC achievement	Signing organisations	Date of adoption
Joint statement on third-country drivers	IRU, ETF	17 April 2024
Joint statement on enforcement of the new driving and rest time provisions for coach tourism drivers	IRU, ETF	24 January 2024
Joint statement on the Recovery and Resilience Facility	ETF, UITP	24 October 2023
Joint statement for COP26 – Tackling climate action with public transport is one of the EU’s largest economic opportunities of the 21st century	ETF, UITP	19 October 2021
Joint recommendations on digital transformation and social dialogue in urban public transport in Europe	ETF, UITP	18 March 2021
Joint charter on improving the treatment of drivers at delivery sites	ETF, IRU	25 November 2020

<b>ESSDC achievement</b>	<b>Signing organisations</b>	<b>Date of adoption</b>
Project report on digital transformation and social dialogue in urban public transport companies	ETF, UITP	July 2020
Efficient enforcement in the aftermath of the COVID-19 pandemic	ETF, IRU, CORTE, ECR, Roadpol	29 May 2020
For a new decade of ambitious and cooperative EU sectoral social dialogue in road transport	ETF, IRU	18 February 2020
Joint recommendation on combating violence and insecurity on urban public transport	ETF, UITP	29 January 2020
Project report on social dialogue in urban public transport in specific central and eastern European countries	ETF, UITP	May 2019
Joint statement: European social partners request dedicated EU support and priority funding for the creation of a genuine network of safe and secure truck parking areas (SSTPAs) in Europe	ETF, IRU	7 May 2019
Joint statement from social partners for better regulation and digital enforcement	ETF, IRU	7 December 2018
Joint statement on European road transport: Social partners call upon European policy decision-makers to ensure a swift follow-up of the European Union Court of Justice (ECJ) decision on services offered by commercial transport intermediaries	ETF, IRU	16 March 2018
Project report on women in employment in the urban public transport sector – WISE II	ETF, UITP	December 2016
Project report on social conditions in urban public transport companies	ETF, UITP	August 2016
Joint statement towards sustainable urban mobility	ETF, UITP	14 March 2016
Taxis – for a level playing field	ETF, IRU	19 November 2014
European Road Transport Agency – Indicative terms of reference	ETF, IRU	19 November 2014
Joint recommendations: Strengthening women in employment in urban public transport	ETF, UITP	8 April 2014
Joint statement: The implication, application and further development of Directive 2003/59/EC on initial qualification and continuous training of professional bus drivers in urban public transport	ETF, UITP	8 April 2014
Social sector partners' proposal for a policy package for the next revision of EU Regulations 1071/2009 on access to the profession and 1072/2009 on access to the road haulage market	ETF, IRU	6 February 2013
Joint statement on the further opening of the EU road haulage market	ETF, IRU	7 December 2012

<b>ESSDC achievement</b>	<b>Signing organisations</b>	<b>Date of adoption</b>
Joint statement on the 2011 transport white paper	ETF, IRU	24 October 2012
Conclusions and recommendations of the STARTS (Skills, Training and the Road Sector) project	ETF, IRU	24 October 2012
Project report on women in employment in the urban public transport sector – WISE I	ETF, UITP	30 August 2012
Report on the implementation of the joint recommendations from 2003 signed by the ETF, UITP and IRU and supported by CER and CEEP	ETF, UITP, IRU	20 October 2011
Joint statement on parking along Europe’s road transport network	ETF, IRU	5 July 2011
Joint statement on the review of the tachograph regulation	ETF, IRU	8 July 2010
Statement on the economic crisis	ETF, IRU	14 May 2009
Joint press release: social dialogue on logistics	ETF, IRU	2 December 2008
The IRU and ETF agree to work together on the 12-day derogation in coach tourism	ETF, IRU	11 April 2008
Common IRU and ETF declaration on illegal employment	ETF, IRU	16 October 2007
Joint position on articles and aspects of Regulation 561/2006/EC requiring clarification and enforcement guidance	ETF, IRU	5 July 2007
Press release on rest facilities	ETF, IRU	11 June 2007
Joint statement regarding the proposed green paper on urban mobility	ETF, UITP	30 January 2007
Joint recommendations on employment and training in logistics	ETF, IRU	31 March 2006
IRU and ETF’s common criteria for rest facilities	ETF, IRU	1 March 2006
Insecurity and the feeling of insecurity – Recommendations of the European social partners to the representatives of managements and of trade unions in local public transport companies in the European Union	ETF, UITP, IRU	13 November 2003
Joint declaration of the EU road sector social dialogue committee on the road safety action plan	ETF, IRU	17 September 2003
Joint declaration of the EU road sector social dialogue committee concerning the social dialogue in the road transport sector and enlargement	ETF, IRU	17 September 2003
Summary report – Insecurity and the feeling of insecurity on local public transport	ETF, UITP, IRU	2 January 2003

ESSDC achievement	Signing organisations	Date of adoption
Joint opinion of the EU road sector social dialogue committee on third-country drivers on EU vehicles engaged in intra-community road transport	ETF, IRU	15 September 2000
Rules of procedure – Road transport	ETF, IRU	7 March 2000
Opinion on the proposal for a Council directive concerning the minimum safety and health requirements for transport activities and workplaces on means of transport	ETF, IRU	24 February 1993
Joint opinion on working safety standards of commercial road transport vehicles	ETF, IRU	28 February 1992
Opinion on the proposal for a Council regulation laying down the definitive system under which non-resident carriers may operate domestic road haulage services within a Member State	ETF, IRU	1 January 1992
Joint opinion on dimensions of cabins	ETF, IRU	20 February 1990

**Note:** CEEP, European Centre of Employers and Enterprises providing Public Services and Services of general interest (now SGI Europe); ECR, Euro Contrôle Route; Roadpol, European Roads Policing Network.

**Source:** European Commission (undated-b)

### 3.8. Participation in the ESSDC

This section analyses the participation of delegates in meetings of the ESSDC from 2020 to 2023 based on data provided by the Directorate-General for Employment, Social Affairs and Inclusion, which organised the meetings. In 2020 there were four meetings and in 2021, 2022 and 2023 there were five meetings. The first meeting of 2020 was an in-person meeting, while all of the other meetings in 2020, all of the meetings in 2021 and the first two meetings of 2022 were videoconference meetings. The other three meetings in 2022 were in-person meetings. In 2023, there was one hybrid meeting, two videoconference meetings and two in-person meetings.

Both trade union and employer delegates from nine Member States regularly attended these meetings, as shown in Table 58. In all four years, meetings were attended by both a trade union delegate and an employer delegate from Belgium, Finland, France, Germany, Hungary, Italy, the Netherlands, Spain and Sweden. On the employer side, there were 16 Member States with a delegate who attended in all four years: in addition to the Member States listed above, employer delegates from Austria, Czechia, Denmark, Ireland, Poland, Portugal and Romania attended in all four years.

No employer delegates participated in any of the 19 meetings over these four years from four Member States: Croatia, Cyprus, Malta and Slovenia. On the trade union side, there was no delegate in any of the meetings over the four-year period from Croatia, Cyprus, Estonia, Greece, Latvia, Poland, Portugal or Slovakia. For Croatia, Cyprus, Greece and Portugal, this is because the ETF has no sectoral trade union affiliated from those four countries. For Estonia, Latvia, Poland and Slovakia, the ETF does have a member organisation, but no delegate participated in any of the meetings.

Table 58: Number of years of attendance at the ESSDC meetings over a four-year period (2020–2023) by trade union and employer organisation delegates

		Number of years with a participating trade union delegate from this Member State					
		0	1	2	3	4	Total number of Member States
Number of years with a participating employer organisation delegate from this Member State	0	CY, HR	MT	SI			4
	1	LV, SK			LU		3
	2	EE, EL	LT				3
	3				BG		1
	4	PL, PT	CZ, IE, RO	AT	DK	BE, DE, ES, FI, FR, HU, IT, NL, SE	16
	Total number of Member States	8	5	2	3	9	

Table 59 provides a scoreboard that combines data on membership and effective participation in meetings for all 27 Member States. In the table, orange is used to indicate the Member States in which there are trade unions and employer organisations affiliated with the ETF, IRU and UITP, while yellow indicates those with companies affiliated with the UITP. Blue indicates the Member States in which a delegate from urban public transport participated in a meeting in the given year, while green indicates those in which delegates from the rest of road transport participated in the given year.



Table 59: Participation of delegates in ESSDC meetings in 2020–2023

Year	Part of the sector	Number of Member States	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	
<b>Trade unions</b>																														
ETF member trade union		23																												
2020	Urban public transport	9																												
	Rest of road transport	12																												
2021	Urban public transport	11																												
	Rest of road transport	15																												
2022	Urban public transport	10																												
	Rest of road transport	14																												
2023	Urban public transport	9																												

Representativeness of the European social partner organisations: Road transport sector

Year	Part of the sector	Number of Member States	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	
	Rest of road transport	9																												
Number of years with a delegate participating			2	4	3		1	4	3			4	4	4		4	1	4	1	3		1	4			1	4	2		
<b>Employer organisations</b>																														
IRU member employer organisation		26																												
UITP member employer organisation		12																												
UITP companies		26																												
2020	Urban public transport	8																												
	Rest of road transport	20																												
2021	Urban public transport	11																												
	Rest of road transport	19																												

Representativeness of the European social partner organisations: Road transport sector

Year	Part of the sector	Number of Member States	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	
2022	Urban public transport	15	Blue	Blue	Blue		Blue	Blue	Blue			Blue	Blue	Blue			Blue	Blue			Blue		Blue		Blue					
	Rest of road transport	14		Green			Green	Green	Green			Green	Green	Green		Green	Green	Green					Green		Green	Green	Green			
2023	Urban public transport	5	Blue	Blue				Blue						Blue				Blue												
	Rest of road transport	14		Green			Green	Green	Green			Green	Green	Green		Green	Green	Green					Green		Green	Green	Green			
Number of years with a delegate participating			4	4	3		4	4	4	2	2	4	4	4		4	4	4	2	1	1		4	2	4	4	4		1	

**Notes:** Orange indicates the Member States with an affiliated trade union or employer organisation; yellow indicates the Member States with an affiliated company; blue indicates the Member States for which a delegate from urban public transport attended a meeting; green indicates the Member States for which a delegate from the rest of road transport attended a meeting.

**Source:** Network of Eurofound Correspondents

## 4. Conclusions

There are around 4.9 million workers in the whole road transport sector in the EU27. Noteworthy is the large proportion of sectoral employment in France, Germany, Italy, Poland and Spain, as together these five countries account for 60% of overall EU employment in the sector. In terms of the importance of the sector's workforce as a proportion of total national employment, this is particularly high in Estonia, Ireland, Latvia, Lithuania and Poland (the sector accounts for over 4% of total national employment in all of these countries).

Considering employment by subsector across the EU, 75% of the sector's workers (where data are available) are employed in the rest of road transport, covering passenger road transport, freight road transport and removal services. The remaining 25% work in urban and suburban transport and taxi operations. In some Member States, these proportions are around 90% and 10%, respectively, as is the case in Hungary, Lithuania, Slovenia and Spain. In Belgium and Poland, they are around 80% and 20%, respectively. In Cyprus, Greece and Malta, on the other hand, the urban public transport workforce more or less equals that in the rest of road transport.

Across the EU27, there are around 850,000 companies in the sector, with around 65% operating in the rest of road transport and 35% operating in urban public transport activities. Most companies (around 523,000) are operating in freight road transport activities (NACE 49.41). The average workforce size of companies active in urban and suburban transport is 53 employees, while for taxi companies the average workforce size is two employees. In the rest of road transport, the average workforce size is seven employees.

Chapter 1 examined further specificities of the sector and how it has been affected by recent trends. The whole transport sector (including urban public transport and the rest of road transport) has been significantly affected by severe labour shortages in recent years. At the same time, the employment in the sector has increased in all the EU Member States.

The transport sector is traditionally dominated by a male workforce, with a proportion of male workers of 77% at EU level in 2020. In Bulgaria, Greece, Luxembourg and Romania, more than 80% of the workers in this sector are men, while Cyprus is the only country with a proportion of male workers of less than 70%.

In Chapter 2, this study identified a total of 114 sector-related trade unions and 110 sector-related employer organisations in the EU27. The methodology applied for the inclusion of national-level organisations is described in the 'Introduction' and is standard for all representativeness studies in this series. Overall, there is at least one sector-related organisation for employees in all 27 Member States and at least one sector-related organisation representing employers' interests in 26 of the Member States (the exception is Cyprus, where there is no employer organisation).

There is only one sectoral trade union per country in both Estonia and Latvia. Spain has the most trade unions in the sector (14), followed by Portugal (11) and Greece (8). The highest number of employer organisations was identified in France (12), followed by Belgium (8) and Spain (7). One country has one employer organisation (Romania). The average number of sectoral trade unions per Member State is 4.1, which is in line with the averages recorded for other sectors. For employer organisations, the average is 4.0 per Member State, indicating a much higher degree of fragmentation in terms of employer organisations than in most other sectors.

Across the EU27, 90 unions in the sector (where membership data were available) have a combined total of over 750,000 members. Taking this against total sectoral employment of 4.9 million employees, this represents an organisational density of trade unions in the sector of 15%. In other words, at least 15% of sector workers are unionised across the EU27.

Of the 110 employer organisations/business associations in the sector, across both urban public transport and the rest of road transport, around 300,000 members of employer organisations/business associations are reported, with around 60,000 in urban public transport and 240,000 in the rest of road transport. There are 64 employer organisations/business associations that organise activities in urban public transport and 74 that organise in the rest of road transport. Regarding the five activities across the whole road transport sector, there are 49 employer organisations that organise in urban and suburban transport activities, 66 that organise in freight road transport, 54 that organise in passenger road transport, 45 that organise in taxi operations and 35 that organise in removal services.

Overall, membership data were available for the majority (91 out of 110) of the employer organisations/business associations identified in the sector. In the majority of Member States (20), membership data were available for all employer organisations/business associations identified in the sector. In the remaining seven Member States, membership data were available for some of the employer organisations/business associations. Membership data were missing for some of the potentially large sector employer organisations/business associations in Belgium, Denmark, Italy and Spain. This means that the current employer organisation/business association membership figures are underestimated.

Across the EU27, 91 employer organisations/business associations in the sector (where membership data were available) have a combined total of almost 300,000 members (counting both individual member companies and in some cases the associations or branches as members). Considering this against the number companies identified in the sector (over 1,300,000), this gives an organisational density of employer organisations/business associations in the sector of 20.8%. In other words, the employer organisations/business associations organise at least 20.8% of sector companies across the EU27. Especially high are the rates of company organisation through employer organisations/business associations in Austria, Germany, Hungary, Netherlands, Poland, Romania and Spain.

The overlaps between the two subsectors (urban public transport and the rest of road transport) are analysed in Section 1.4, while the links between different activities are presented in Table 7 in Section 1.3. The situation of the national organisations and the representativeness of the ETF, IRU and UITP is presented below. Table 60 shows the overlap for those organisations whose membership covers both urban public transport and the rest of road transport. Tables 61 and 62 set out those organisations that cover only one of the subsectors.

Table 60: Overlapping organisations covering both urban public transport and the rest of road transport

	Total number	Number covering both urban public transport and the rest of road transport	%	Organisations covering both urban public transport and the rest of road transport, represented in the ESSDC	
Trade unions	114	54	47	36 ETF members	36/54 = 67%
Employer organisations	110	28	25	23 IRU members	23/28 = 82%
				8 UITP members	8/28 = 29%

**Note:** Most company members of the UITP cover only urban public transport activities.

In the urban public transport working group of the road transport ESSDC, taxi activities and the outsourcing of bus lines make both the UITP and the IRU the representative European organisations on the employer side, while the ETF is the representative organisation on the trade union side.

Table 61: Organisations covering urban public transport only, without any membership in the rest of road transport

	Total number	Number covering only urban public transport	%	Organisations covering only urban public transport, represented in the ESSDC	
Trade unions	114	47	41	15 ETF members	15/47 = 32%
Employer organisations	110	36	33	6 IRU members	6/36 = 17%
				8 UITP members (UITP has the most member companies (95% companies))	8/36 = 22%

Table 62: Organisations covering the rest of road transport only, without any membership in urban public transport

	Total number	Number covering the rest of road transport only	%	Organisations covering the rest of road transport only, represented in the ESSDC	
Trade unions	114	13	11	5 ETF members	5/13 = 38%
Employer organisations	110	46	42	22 IRU members	22/46 = 48%
				1 UITP member	1/46 = 2%

The preceding assessment has covered the overlap and the representativeness of the overlapping organisations and of the organisations covering only one of the two working groups in the ESSDC. The

rest of the assessment of the representativeness of the organisations covers the entire road transport ESSDC.

Chapter 3 assessed the representativeness of the ETF, IRU and UITP, in terms of their membership strength, sector-relatedness, place in the industrial relations landscape and internal structures ensuring effective participation in the ESSDC. Full details on the proportion of the sectoral workforce represented by the national affiliates of the European social partners are not available in this study. Chapter 3 also lists the national sectoral trade unions and employer organisations not represented in the ESSDC and the other European associations that have some representativeness in the sector.

The **ETF** affiliates 56 unions in the sector, which represents 49% of all 114 sector unions identified in this study, in 23 Member States (the exceptions being Croatia, Cyprus, Greece and Portugal). Fifty-two ETF members are involved in collective bargaining, which represents 47% of all sector unions involved in collective bargaining, in 23 Member States (except Croatia, Cyprus, Greece and Portugal). Of the 104 trade unions that are representative in the national industrial relations system, 55 unions (53%) are affiliated with the ETF in 22 Member States. The two ETF members that are not considered representative are OZ KOVO in Slovakia and SLT in Romania. Of all the workers in the sector who are members of a trade union, 85% are members of a trade union affiliated with the ETF. In urban public transport this proportion is 87% and in the rest of road transport it is 84%. ETF affiliates organise 13% of workers in the whole road transport sector, 24% of workers in urban public transport and 9% of workers in the rest of road transport. Among the 79 largest companies in urban public transport, 37 are organised by trade unions affiliated with the ETF, with a collective workforce of 72% of the total workforce of all 79 of these companies. For the rest of road transport, 33 of the 70 largest companies are organised by a trade union affiliated with the ETF, with a collective workforce of 63% of all 70 of these companies.

Other European associations have four affiliated road transport sector trade unions. The ETF is the only one with a statutory mandate to negotiate. In terms of sector-relatedness, the ETF covers the entire road transport sector, all activities of the urban transport working group and all activities of the rest of road transport working group. The ETF also organises workers in other transport sectors. Half of all sectoral trade unions are affiliated with the ETF and half of all trade unions are also involved in collective bargaining. In 23 Member States, the ETF has a member union involved in sector-level collective bargaining. For Croatia, Cyprus, Greece and Portugal, this is not the case, but, in all four of these Member States, the ETF has a member union involved in company-level collective bargaining. The ETF has internal structures that ensure its effective participation in the ESSDC and in Commission consultations.

It can thus be concluded that **the ETF is the only representative European trade union organisation for the road transport sector.**

The **IRU** affiliates 51 employer organisations/business associations in the sector, which represents 46% of the 110 sector employer organisations/business associations, in 26 Member States (there are no IRU members in Cyprus, where there is no employer organisation). Forty-two IRU members are involved in collective bargaining, which represents 51% of all 83 employer organisations involved in collective bargaining in the sector. IRU members conduct sector-related collective bargaining in 25 Member States, except in Slovakia (where the IRU member participates in wider social dialogue at national level) and Cyprus (where there is no employer organisation). IRU affiliates organise 28.07% of companies active in the whole road transport sector, 15.19% of companies active in urban public transport and 35.43% of companies active in the rest of road transport.

Among the largest 79 urban public transport companies, 12 are affiliated with employer organisations that are members of the IRU. Together these 12 companies have a collective workforce that accounts for 15% of the largest 79 companies, which corresponds to 1.7% of the entire urban public transport workforce. For the rest of road transport, 30 of the 70 largest companies are affiliated with employer organisations that are members of the IRU. Together these have a collective workforce that accounts for 64% of the largest 70 companies, which corresponds to 12% of the entirety of the workforce of the rest of road transport.

Of the 51 IRU employer organisation/business association members, 13 are considered business associations and all 13 are representative in their countries, while two are involved in collective bargaining, five are involved in social dialogue structures and all 13 are consulted by the government. For these reasons, 13 business association IRU members are included in the study.

Of the 80 employer organisations/business associations in the sector that are considered representative, most (50) IRU affiliates (63%) are considered representative in 26 Member States (noting the situation in Cyprus, where there is no employer organisation). One IRU member is not considered representative, namely UNIT in France.

In terms of sector-relatedness, the IRU covers the entire road transport sector. Its representativeness is strongest for freight transport: 36 affiliated organisations in 24 Member States. The IRU has 27 member organisations covering taxi activities in 18 Member States, 26 member organisations covering passenger road transport in 19 Member States, 21 member organisations covering urban and suburban transport in 15 Member States and 20 member organisations covering removal services in 16 Member States (see Table 33 in Section 3.2). The IRU has affiliated organisations involved in sector-related collective bargaining in 25 Member States, indicating that they are an integral and recognised part of the national industrial relations landscape. Through its member associations in both road transport and urban public transport, the IRU represents the interests of both large and small companies, including taxis, which are an integral part of urban public transport.

The **UITP** affiliates 17 employer organisations/business associations in the sector, which represents 15% of the 110 sector employer organisations/business associations in the sector, in 12 Member States. The UITP also affiliates 359 major urban public transport operators (individual employers) in 26 Member States (except Lithuania) (see Annex 6 with the full list of UITP member operators). Fifteen employer organisation members of the UITP are involved in collective bargaining, which represents 18% of all 83 employer organisations involved in collective bargaining. Taken together with the UITP member companies that are urban public transport operators, UITP members conduct sector-related collective bargaining in 26 Member States (with the exception of Lithuania, where there are no UITP members). Of the UITP's 17 employer organisation/business association members, three are considered business associations; all three are representative in their countries, one is involved in collective bargaining, two are involved in social dialogue structures and all three are consulted by the government. For these reasons, three business associations are included in the study.

UITP employer organisation affiliates organise 0.83% of companies active in the whole road transport sector, 1.16% of companies active in urban public transport and 0.68% of companies active in the rest of road transport. This needs to be considered together with the 359 UITP company affiliates that are major public transport operators in 26 Member States.

Among the 79 largest companies in urban public transport, 54 are affiliated with the UITP, with a total workforce that accounts for 90% of that of the largest companies; this corresponds to 11% of the total



urban public transport workforce. For the rest of road transport, 14 of the 70 largest companies are affiliated with the UITP, with a collective workforce that accounts for 40% of that of the largest companies, which corresponds to 8% of the total workforce in the rest of road transport.

Of the 80 employer organisations/business associations in the sector that are considered representative, all 17 UITP employer organisation affiliates (21%) are considered representative in 12 Member States.

In terms of sector-relatedness, the UITP's representativeness is strongest in urban and suburban transport activities, with 17 employer organisation members in 13 Member States. This is followed by 12 employer organisation members covering passenger road transport activities in nine Member States, nine employer organisation members covering freight road transport activities in seven Member States, eight employer organisation members covering taxi operations in six Member States and six employer organisation members covering removal activities in six Member States. The UITP's largest contribution to the sectoral industrial landscape comes from the involvement of its affiliated companies in single-employer, company-level collective bargaining.

European associations other than the IRU and UITP were found to have 10 affiliated road transport employer organisations/business associations. In addition, the IRU and UITP have the proven capacity to negotiate. It can thus be concluded that **the IRU (for road transport and urban public transport) and the UITP (for urban public transport) are the most representative European employer organisations for the road transport sector.**

The national sectoral organisations not represented in the ESSDC might benefit from opportunities for capacity building. Of the 114 sector-related unions in the EU27, 58 are not affiliated with the ETF. Together, they organise around 86,000 workers in the sector. In terms of sector coverage, 48 non-affiliated unions organise workers in passenger bus transport, 45 organise workers in urban public transport, 49 in organise workers taxi operations, 52 in organise workers freight road transport and 34 organise workers in removal services. On the employer side, there are 36 national employer organisations not affiliated with the IRU or UITP and, as such, not represented in the ESSDC. Very few sector-related European associations have members among the employer organisations/business associations in the sector.

The urban public transport subsector has 1,285,323 employees, of which 734,721 are employed by urban and suburban transport providers (NACE 49.31) and 550,602 are employed in taxi services (NACE 49.32). Together, these groups account for 0.7% of the total European workforce (see Table 2 in Section 1.1). In terms of individual employers, there are 14,024 companies in urban and suburban transport activities and 270,448 taxi companies. The average number of workers in urban and suburban transport companies is over 50, which is much higher than the average of two employees per taxi company. The link between taxi activities and urban public transport systems is clarified in Table 7 in Section 1.3, while the link between passenger bus transport and urban public transport systems is clarified in Table 9 in Section 1.4. There are 101 national trade unions organising in the urban public transport subsector (see Table 13 in Chapter 2). The ETF affiliates 51 of the 101 trade unions in this subsector (50%). Of these 51 trade unions, there are 15 that organise only in the urban public transport subsector, while 36 cover both this subsector and the rest of road transport subsector (Table 24 in Section 3.1). Further details on the sector-relatedness of the ETF members in the different activities of the urban public transport subsector can be found in Table 28 in Section 3.1. Among the 70 largest companies in urban public transport activities listed in the country profiles in Annex 1 and Table 23 in Section 2.5, there are 33 organised by the ETF. Together these companies have a workforce

that accounts for 72% of the 70 largest companies and 8.5% of the entire urban public transport workforce.

Of the 101 trade unions in the urban public transport subsector, there are 89 that organise the workers of urban and suburban transport providers (NACE 49.31), in all Member States. Of the 89 trade unions organising the workers of urban and suburban transport providers, 44 are affiliated with the ETF in 23 Member States. Only in Croatia, Cyprus, Greece and Portugal does the ETF does not have a member covering NACE 49.31. Of the 101 trade unions in this subsector, 54 trade unions organise taxi drivers (NACE 49.32), in 20 Member States. Of them, there are 32 trade unions affiliated with the ETF in 18 Member States. In Greece and Portugal, there are taxi driver trade unions but no such trade union is affiliated with the ETF (see Table 25 in Section 3.1).

On the employer side, there are 64 employer organisations that cover the urban public transport subsector. The IRU affiliates 29 of them (45%). Of those, there are six employer organisations that organise only urban public transport employers, while 23 also organise the rest of the road transport subsector. Specific details about the sector-relatedness of the IRU member organisations in the different activities of the urban public transport subsector can be found in Table 36 in Section 3.2.

Of the 64 employer organisations in the urban public transport subsector, there are 49 in 24 Member States that organise employers in urban and suburban transport (NACE 49.31). Of those, 21 are affiliated with the IRU (43%), from 15 Member States.

Of the 64 employer organisations in this subsector, there are 45 organising employer in taxi activities (NACE 49.32) in 24 Member States. The IRU affiliates 27 of them (60%) in 18 Member States (see Table 33 in Section 3.2).

The UITP affiliates 17 of the 64 employer organisations in the urban public transport subsector (27%). Of those, eight organise employers in the urban public transport subsector only, while eight also organise employers in the rest of the road transport. Details of the sector-relatedness of the UITP member organisations and member companies in the different activities of the urban public transport subsector can be found in Section 3.3 in Table 43 for the affiliated employer organisations and Table 44 for the affiliated companies. Of the 49 employer organisations organising urban and suburban transport providers, 17 are affiliated with the UITP (35%) in 12 Member States. Of the 45 that organise taxi activities, eight are affiliated with the UITP (18%) in seven Member States.

The representativeness of UITP in the subsector can, however, be assessed only by taking all its member companies into consideration. In all Member States, the UITP affiliates large companies providing urban public transport services (see Table 44 in Section 3.3). The important role of those large companies in the urban public transport subsector is reflected in Table 23 in Section 2.5, while the role of the UITP's member companies in the industrial relations landscape is reflected in Table 46 in Section 3.3, as well as in the country profiles in Annex 1.

The UITP has, either directly or indirectly through affiliated employer organisations, 54 of the largest urban public transport companies in its membership domain. Together, these companies have a collective workforce corresponding to 90% of the total workforce of all the 79 largest companies and to 11% of the total urban public transport workforce.

Based on these findings, it can be concluded that the ETF is the only European trade union organisation for this subsector, while the IRU and UITP are together the most representative European employer organisations. The representativeness of the IRU in the urban public transport working group of the road transport ESSDC comes from its member organisations representing taxi activities (NACE 49.32)

and its representative bus and coach trade associations, which represent the interests of their members, large and small, involved in urban public transport,<sup>47</sup> as well as the outsourcing of bus lines as part of local urban public transport (NACE 49.31). Apart from taxis and hire cars with drivers, through its bus and coach member associations, the IRU also represents companies, large and small, including in particular small and medium-sized enterprises, thus giving them a voice in sectoral social dialogue. Indeed, the IRU's membership covers a number of bus and coach employer associations that are involved in NACE 49.31 activities, covering 43,223 private companies (namely 68.86% of all employer organisation members and 15.19% of the companies in the sector), including both large (for example, companies such as Transdev and Keolis are IRU members in multiple countries) and small companies. The IRU's membership also covers taxi-related NACE 49.32 activities (27 employer organisations, namely 60% of employer organisations organising taxi activities) from 18 Member States. Of the largest 79 companies in urban public transport activities, IRU-affiliated employer organisations organise 12 of them, with a collective workforce that represents 15% of that of all 79 of the largest companies or 1.7% of the entire urban public transport workforce. The IRU also represents small and medium-sized companies in urban public transport, including taxis and hire cars with drivers.

The UITP (17 employer organisation members) and the IRU (26 employer organisation members in the passenger road transport sector and 27 employer organisation members in the taxi and hire cars with drivers sector) have more or less equal numbers of affiliated employer organisations in the urban public transport subsector. However, the significant number of affiliated urban public transport companies, and their importance, make the UITP the most representative European employer organisation for the urban public transport subsector covering large companies.

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<sup>47</sup> In some cases, such as in Germany, where there is a federal structure and division of powers, including regarding sectoral social dialogue, it is the state (*Länder*) member associations of the IRU member association (the BDO in Germany) that are engaged in sectoral social dialogue and negotiations. In Denmark, the four largest public transport companies are members of the IRU member association, the DPT.

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## Annexes

### Annex 1: EU27 country profiles presenting the industrial relations landscape in each of the 27 Member States

<b>AUSTRIA</b> 	Size of road transport workforce: no data	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 100%	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: no data	Collective bargaining coverage, rest of road transport: nearly 100%	Rest of road transport: collective bargaining at sector and company levels

4 trade unions	<p>All trade unions are considered to be representative based on the principle of mutual recognition and the right to conclude collective agreements. All are involved in the sector's collective bargaining processes.</p> <p>Three unions organise workers in the whole of the road transport sector, including in both urban public transport and the rest of road transport. One union organises workers in urban public transport activities. In the sector, vida (considered to be the largest union in the whole of road transport in the country; no membership data disclosed) generally represents both blue-collar and white-collar workers. In the passenger transport sectors with private vehicles, GPA represents commercial white-collar workers.</p> <p>While, in Vienna, employees of the publicly owned Wiener Linien are represented by younion, employees in publicly owned urban public transport providers in other cities are represented by vida.</p> <p>For the bus sector, there is only one collective agreement for all companies (1,260) in Austria. This collective agreement regulates all those areas that are not specified by EU regulations (e.g. driving and rest periods). For the taxi sector, there is only one collective agreement for all companies in Austria. All rules of the collective agreement apply to small and large companies. The only difference is that large companies usually have an elected works council. In such companies, it is possible that further rules are agreed at company level in addition to the nationwide collective agreement. Such company-level agreements supplement the nationwide collective agreement for employees of such a companies.</p>
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Representativeness of the European social partner organisations: Road transport sector

	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
vida (whole road transport)	No data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF organises all four trade unions in the sector, all of which are considered representative and participate in the sectoral collective bargaining processes. No other European associations have members in the country.
GPF (whole road transport)	No data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes (company level)	ETF	
GPA (whole road transport)	No data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
younion (urban public transport)	6,684	6,684	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes (company level)	ETF	

5 employer organisations	All employer organisations are considered to be representative in their domains based on the principle of mutual recognition and the right to conclude collective agreements. All are involved in the sector's collective bargaining processes. The different employer organisations organise employers in different parts of the road transport sector.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
FVALS (whole road transport)	1,260	240	1,020	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	IRU	The IRU affiliates three of the five employer organisations in Austria. This includes employer organisations that organise in urban public transport or the rest of road transport only.

Representativeness of the European social partner organisations: Road transport sector

FVGB (rest of road transport)	9,306	No members	9,306	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU, ARGE, Logcom	The UITP affiliates one employer organisation that is present in urban public transport activities.
FVS (rest of road transport)	603	No members	603	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	
FVSB (urban public transport)	20	20	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	UITP, CER	
FVBG (urban public transport)	6,418	6,418	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	IRU	

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector – no data in Austria)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Wiener Linien GmbH	NACE 49.31 (active in urban, suburban and regional/interurban transport)	Private (but owned 100% by the city of Vienna)	8,700	younion	FVSB	UITP	Collective bargaining at company level



Representativeness of the European social partner organisations: Road transport sector

Postbus GmbH	NACE 49.31 – motor bus (active in urban, suburban and regional/interurban transport) NACE 49.39 (school buses, airport shuttles, scheduled long-distance bus services)	Private (100% subsidiary of Austrian Federal Railways (ÖBB))	7,800	GPF, vida	Part of the workforce: FVALS		Collective bargaining at sector and company levels
Gebrüder Weiß	NACE 49.41 – freight transport by road	Private	2,700 in Austria	vida, GPA	FVGB (affiliated with several sectoral organisations, as the company also operates in other sectors, e.g. logistics)		Collective bargaining at sector level
<b>Three largest employers in urban public transport activities</b>							
Wiener Linien GmbH	NACE 49.31 (active in urban, suburban and regional/interurban transport)	Private (but owned 100% by the city of Vienna)	8,700	younion	FVSB	UITP	Collective bargaining at company level
Postbus GmbH	NACE 49.31 – motor bus (active in urban, suburban and regional/interurban transport) NACE 49.39 (school buses, airport shuttles, scheduled long-distance bus services)	Private (100% subsidiary of ÖBB)	3,900	GPF, vida	Part of the workforce: FVALS		Collective bargaining at sector and company levels
Dr Richard Group	NACE 49.31 – motor bus (active in urban, suburban and regional/interurban transport) NACE 49.39 – passenger road transport According to the company itself, 75% of the services provided by the Dr Richard Group in 2018 were in public transport (both urban and regional)	Private; active in seven out of nine regional provinces in Austria	1,510	vida	FVALS		Collective bargaining at sector level

## Representativeness of the European social partner organisations: Road transport sector

Three largest employers in the rest of road transport							
Gebrüder Weiß	NACE 49.41 – freight transport by road	Private	2,700	vida, GPA	FVGB (affiliated with several sectoral organisations, as the company also operates in other sectors, e.g. logistics)		Collective bargaining at sector level
Postbus GmbH	NACE 49.39 – passenger road transport	Private (100% subsidiary of ÖBB)	3,900	GPF, vida	Part of the workforce: FVALS		Collective bargaining at sector and company levels
No third company identified							

The IRU member organisations from Austria provided the following additional information regarding the industrial relations landscape in the sector in Austria.


For the bus sector:

- There is only one collective agreement for all companies (1,260) in Austria.
- This collective agreement regulates all those areas that are not specified by EU regulations (e.g. driving and rest periods).
- There are no differences between regular and occasional services with regard to working hours, the rules for overtime, holiday entitlements, termination provisions or incapacity to work.
- There are also no differences in basic wages between all members. There are only differences in 'expense allowances'. There are different requirements for regular and occasional services.
- There are only differences when the EU regulations allow national rules for 'regular services up to 50 kilometres'.
- For 'regular services up to 50 kilometres', there are therefore differences in driving breaks, rest periods, rest breaks and weekly rest periods.
- These provisions are negotiated annually with vida (trade union) for all Austrian companies. Since many members have mixed operations (that is, offer different lines and occasional services), there is no interest in deviating from this collective agreement for all members.
- All rules of the collective agreement apply to small and large companies. The only difference is that large companies usually have an elected works council. In such companies, it is possible that further rules are agreed at company level in addition to the nationwide collective agreement. Such company-level agreements supplement the nationwide collective agreement for employees of such companies.

For the taxi sector

- There is only one collective agreement for all companies in Austria.
- There are no EU regulations for driving and rest periods in the taxi sector. The rules on working hours comply with the provisions of the Working Hours Act. The Working Hours Act complies with the requirements of the EU Working Hours Directive for the sector.
- All rules of the collective agreement apply to small and large companies. The only difference is that large companies usually have an elected works council. In such companies, it is possible that further rules are agreed at company level in addition to the nationwide collective agreement. Such company-level agreements supplement the nationwide collective agreement for employees of such companies.

## Representativeness of the European social partner organisations: Road transport sector

<b>BELGIUM</b> 	Size of road transport workforce: 150,000	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 96–100%	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: 150,000	Collective bargaining coverage, rest of road transport: 96–100%	Rest of road transport: collective bargaining at sector and company levels

7 trade unions	There are seven trade unions in the sector in Belgium: three unions covering the whole road transport sector, two unions organising members in urban public transport and two unions organising members in the rest of road transport. All seven trade unions are considered to be representative based on legal/statutory criteria. All are involved in the sector's collective bargaining processes. The largest unions are ABVV-FGTB BTB-UBT and ACV-CSC Transcom, which both organise blue-collar workers in the entire country. ABVV-FGTB BBTk SETCa organises white-collar workers in the entire sector, while ACV-CSC Puls organises white-collar workers in Flanders. ACLVB-CGSLB organises all types of workers in the entire country. For public sector employees in urban public transport, ABVV-FGTB ACOD-CGSP and ACV-CSC Public Services are also relevant.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
ACLVB-CGSLB (whole road transport)	5,129	5,129	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF organises six out of the seven trade unions in the sector, all of which are considered representative and participate in the sectoral collective bargaining processes. No other European associations have members in the country.
ABVV-FGTB BTB-UBT (whole road transport)	No data	4,800	35,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
ACV-CSC Transcom (whole road transport)	No data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
ACV-CSC Public Services (urban public transport)	3,500	3,500	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	

Representativeness of the European social partner organisations: Road transport sector

ABVV-FGTB ACOD-CGSP (urban public transport)	10,883	10,883	No members	Rest of road transport: no Urban public transport: yes	Rest road transport: no Urban public transport: yes	ETF	
ABVV-FGTB BBTK-SETCa (rest of road transport)	No data	No members	No data	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No data	
ACV-CSC Puls (rest of road transport)	11,000	No members	11,000	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	ETF	

8 employer organisations	All employer organisations are considered to be representative in their domains based on legal/statutory criteria. One employer organisation organises employers across the road transport sector and all of the others organise employers in different parts of the road transport sector.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
FBAA (whole road transport)	279	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	IRU, UITP	The IRU affiliates three of the eight employer organisations. This includes employer organisations that organise in urban public transport or the rest of road transport only. The UETR affiliates two employer organisations, both in the rest road transport. The UITP affiliates two employer organisations. This includes an employer

Representativeness of the European social partner organisations: Road transport sector

BKV-CBD (rest of road transport)	98	No members	98	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	Fedemac	organisation that organises in urban public transport only.
Febetra (rest of road transport)	1,800	No members	1,800	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
TLV (rest of road transport)	1,400	No members	1,400	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	UETR	
UPTR (rest of road transport)	2,500	No members	2,500	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	UETR	

Representativeness of the European social partner organisations: Road transport sector

WF-FE (rest of road transport)	518	No members	518	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	
BVGSSV (urban public transport)	3	3	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	UITP	
GTL TAXI (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes (taxis)	IRU	

Representativeness of the European social partner organisations: Road transport sector


	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
De Lijn	Urban public transport	Public	10,000 (7%)	ACV-CSC Public Services, ACLVB-CGSLB, ABVV-FGTB ACOD-CGSP	BGVSSV	UITP	Collective bargaining at sector and company levels
MIVB-STIB	Urban public transport	Public	10,000 (7%)	ACV-CSC Public Services, ACLVB-CGSLB, ABVV-FGTB ACOD-CGSP	BGVSSV	UITP	Collective bargaining at sector and company levels
TEC	Urban public transport	Public	5,500 (4%)	ACV-CSC Public Services, ACLVB-CGSLB, ABVV-FGTB ACOD-CGSP	BGVSSV	UITP	Collective bargaining at sector and company levels
<b>Three largest employers in urban public transport activities</b>							
De Lijn	Urban public transport	Public	10,000	ACV-CSC Public Services, ACLVB-CGSLB, ABVV-FGTB ACOD-CGSP	BGVSSV	UITP	Collective bargaining at sector and company levels
MIVB-STIB	Urban public transport	Public	10,000	ACV-CSC Public Services, ACLVB-CGSLB, ABVV-FGTB ACOD-CGSP	BGVSSV	UITP	Collective bargaining at sector and company levels
TEC	Urban public transport	Public	5,500	ACV-CSC Public Services, ACLVB-CGSLB, ABVV-FGTB ACOD-CGSP	BGVSSV	UITP	Collective bargaining at sector and company levels



Representativeness of the European social partner organisations: Road transport sector

Three largest employers in the rest of road transport							
H. Essers	Freight transport by road	Private	3,000	ABVV-FGTB BTB-UBT, ABVV-FGTB BBTK-SETCa, ACLVB-CGSLB, ACV-CSC Transcom, ACV-CSC Puls	TLV, UPTR, Febetra, WF-FE		Collective bargaining at sector and company levels
Distrilog	Freight transport by road	Private	1,300	ABVV-FGTB BTB-UBT, ABVV-FGTB BBTK-SETCa, ACLVB-CGSLB, ACV-CSC Transcom, ACV-CSC Puls	TLV, UPTR, Febetra, WF-FE		Collective bargaining at sector and company levels
Jost Group	Freight transport by road	Private	1,100	ABVV-FGTB BTB-UBT, ABVV-FGTB BBTK-SETCa, ACLVB-CGSLB, ACV-CSC Transcom, ACV-CSC Puls	TLV, UPTR, Febetra, WF-FE		Collective bargaining at sector and company levels

Representativeness of the European social partner organisations: Road transport sector

<b>BULGARIA</b> 	Size of road transport workforce: 86,699	Size of urban public transport workforce: 16,478	Collective bargaining coverage, urban public transport: 55%	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: 70,221	Collective bargaining coverage, rest of road transport: 0%	Rest of road transport: no collective bargaining at sector or company level

3 trade unions	There are three trade unions in the sector in Bulgaria: one union with members covering the whole of sector and two unions organising members in urban public transport activities. All three unions are considered representative in their membership domains according to the legal criteria and all participate in the urban public transport collective bargaining processes at company level. There is no company- or sectoral-level collective bargaining in the rest of road transport.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
FTTU (whole road transport)	4,393	4,393	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF organises two of the three trade unions in the sector, all of which are considered representative and participate in the sectoral collective bargaining processes. One of these is the union that has members covering the whole road transport sector. No other European associations have members in the country.
FTW – Podkrepa (urban public transport)	2,400	2,400	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	
SJB (urban public transport)	120	120	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	

2 employer organisations	Both employer organisations are considered to be representative in their domains based on legal/statutory criteria. Both employer organisations organise employers in the rest of road transport and do not participate in collective bargaining processes, as there is no sectoral- or company-level collective bargaining in the rest of road transport. There are no employer organisations in urban public transport activities in the country (collective bargaining processes take place at company level).
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## Representativeness of the European social partner organisations: Road transport sector


	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Aebtri (rest of road transport)	870	No members	870	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	The IRU organises both employer organisations in the sector, which are considered representative. No other European association has members in the country.
CBRH (rest of road transport)	396	No members	396	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Metropolitan	Metro	Public	2,033 (2.3%)	FTTU, FTW – Podkrepa, SJB, NRWS	None		Collective bargaining at company level
Stolichen Electrotransport JSC	Light rail (tram) and trolley bus	Public	2,000 (2%)	FTTU, FTW – Podkrepa	United Business Clubs (UBS) and Electric Vehicles Industrial Cluster (EVIC)	UITP	Collective bargaining at company level
Discordia	Freight transport by road	Private	2,000 (2%)	None	Confederation of Employers and Industrialists in Bulgaria (CEIB), Bulgarian National Freight Forwarding Association (NSBS)		None

Representativeness of the European social partner organisations: Road transport sector

<b>Three largest employers in urban public transport activities</b>							
Metropolitan	Metro	Public	2,033	FTTU, FTW – Podkrepa, SJB, NRWS	None		Collective bargaining at company level
Stolichen Electrotransport JSC	Light rail (tram) and trolley bus	Public	2,000	FTTU, FTW – Podkrepa	UBS and EVIC	UITP	Collective bargaining at company level
Stolichen Autotransport EAD	Bus	Public	1,917	FTTU, FTW – Podkrepa	None		Collective bargaining at company level
<b>Three largest employers in the rest of road transport</b>							
Discordia	Freight transport by road	Private	2,000	None	CEIB, NSBS		None
PIMK	Freight transport by road	Private	1,632	None	No data		None
Transpress Delivery	Freight transport by road	Private	900	None	No data		None

Representativeness of the European social partner organisations: Road transport sector

<b>CYPRUS</b> 	Size of road transport workforce: 8,300	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 93%	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: 8,300	Collective bargaining coverage, rest of road transport: 12%	Rest of road transport: collective bargaining at company level

2 trade unions	There are two trade unions in the sector in Cyprus, both organising members across the whole road transport sector. Both unions are considered representative in their membership domains based on mutual recognition and all participate in collective bargaining processes at company level.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Segdamelin – PEO (whole road transport)	510	450	60	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	No European associations have members in this country.
FTPAAW – SEK (whole road transport)	750	500	250	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	

No employer organisations	There are no employer organisations in the road transport sector in Cyprus. Collective bargaining takes place at company level. No European associations have employer organisation members in the country.
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## Representativeness of the European social partner organisations: Road transport sector

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Cyprus Public Transport	Urban and suburban passenger land transport systems	Private	~600 (7%)	Segdamelin – PEO, FTPAW – SEK	No employer organisations	UITP	Collective bargaining at company level
Limassol Passenger Transport Company	Urban and suburban passenger land transport systems	Private	~250 (3%)	Segdamelin – PEO, FTPAW – SEK	No employer organisations		Collective bargaining at company level
Paphos Transport Organisation	Urban and suburban passenger land transport systems	Private	~180 (2%)	Segdamelin – PEO, FTPAW – SEK	No employer organisations		Collective bargaining at company level
<b>Three largest employers in urban public transport activities</b>							
Cyprus Public Transport	Urban and suburban passenger land transport systems	Private	~600	Segdamelin – PEO, FTPAW – SEK	No employer organisations	UITP	Collective bargaining at company level
Limassol Passenger Transport Company	Urban and suburban passenger land transport systems	Private	~250	Segdamelin – PEO, FTPAW – SEK	No employer organisations		Collective bargaining at company level
Paphos Transport Organisation	Urban and suburban passenger land transport systems	Private	~180	Segdamelin – PEO, FTPAW – SEK	No employer organisations		Collective bargaining at company level
<b>Three largest employers in the rest of road transport</b>							
'Zenon' Larnaca Buses	Passenger road transport	No data	~155	Segdamelin – PEO, FTPAW – SEK	No employer organisations		Collective bargaining at company level

Representativeness of the European social partner organisations: Road transport sector

Cyprus Intercity Buses	Passenger road transport	No data	~80	Segdamelin – PEO, FTPAW – SEK	No employer organisations		Collective bargaining at company level
Limassol Buses Company	Passenger road transport	No data	~15	Segdamelin – PEO, FTPAW – SEK	No employer organisations		Collective bargaining at company level

Representativeness of the European social partner organisations: Road transport sector

<b>CZECHIA</b> 	Size of road transport workforce: 169,548	Size of urban public transport workforce: 41,805	Collective bargaining coverage, urban public transport: 80%	Urban public transport: collective bargaining at company and sector levels
		Size of rest of road transport workforce: 127,743	Collective bargaining coverage, rest of road transport: 55%	Rest of road transport: collective bargaining at company and sector levels

2 trade unions	There are two trade unions in the sector in Czechia, both organising members across the whole road transport sector. Both unions are considered representative in their membership domains based on mutual recognition and all participate in collective bargaining processes at company and sectoral levels.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
OS DOSIA (whole road transport)	8,125	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	The ETF organises one of the trade unions in the country, which organises workers across the road transport sector as a whole, is considered representative and participates in collective bargaining processes. No other European associations have members in the country.
OSD (whole road transport)	7,000	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	



## Representativeness of the European social partner organisations: Road transport sector


2 employer organisations	There are two employer organisations in the road transport sector in Czechia, both organising members across the road transport sector as a whole. Both are considered representative in their domains. Česmad Bohemia is focused on road transport, both passengers and freight.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Česmad Bohemia (whole road transport)	2,034	8	2,026	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	The IRU organises one of the two employer organisations in the country, which is considered representative in the rest of road transport and is involved in collective bargaining processes. No other European associations have members in the country.
SD ČR (whole road transport)	33	2	31	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Dopravní podnik hlavního města Prahy AS (Prague Public Transit Company)	Bus, metro, tram, trolley bus (minor position), water-borne urban public transport (minor position), funicular (minor position)	Public (joint-stock company with the only shareholder, which is the Municipality of Prague)	11,051 (7%)	26 trade union organisations, mostly independent and active only at workplace level	UITP, Association of Transport Companies of the Czech Republic (Sdružení dopravních podniků České republiky, SDPCR)	UITP	Collective bargaining at company and sector levels

## Representativeness of the European social partner organisations: Road transport sector

Dopravní podnik města Brna AS (Brno Public Transport Authority)	Bus, tram, trolley bus, water-borne urban public transport (minor position)	Public (joint-stock company with the only shareholder, which is the Municipality of Brno)	2,547 (2%)	Six trade union organisations, mostly independent and active only at workplace level	SDPCR, Česmad Bohemia		Collective bargaining at company and sector levels
Dopravní podnik Ostrava AS (Ostrava Public Transport)	Bus, tram, trolley bus	Public (joint-stock company with the only shareholder, which is the Municipality of Ostrava)	2,044 (1.9%)	OS DOSIA, DPPO (trade union of employees)	SDPCR		Collective bargaining at company level
<b>Three largest employers in urban public transport activities</b>							
Dopravní podnik hlavního města Prahy AS (Prague Public Transit Company)	Bus, metro, tram, trolley bus (minor position), water-borne urban public transport (minor position), funicular (minor position)	Public (joint-stock company with the only shareholder, which is the Municipality of Prague)	11,051	26 trade union organisations, mostly independent and active only at workplace level	UITP, SDPCR	UITP	Collective bargaining at company and sector levels
Dopravní podnik města Brna AS (Brno Public Transport Authority)	Bus, tram, trolley bus, water-borne urban public transport (minor position)	Public (joint-stock company with the only shareholder, which is the Municipality of Brno)	2,547	Six trade union organisations, mostly independent and active only at workplace level	SDPCR, Česmad Bohemia		Collective bargaining at company and sector levels
Dopravní podnik Ostrava AS (Ostrava Public Transport)	Bus, tram, trolley bus	Public (joint-stock company with the only shareholder, which is the Municipality of Ostrava)	2,044	OS DOSIA, DPPO (trade union of employees)	SDPCR		Collective bargaining at company level
<b>Three largest employers in the rest of road transport</b>							
CS CARGO AS	Freight transport by road	Private	1,700	Basic organisation of the trade union of transport: CS CARGO AS	Česmad Bohemia		Collective bargaining at company level
Student Agency Holding AS	Passenger road transport	Private	1,400	Basic organisation of the trade union of transport: Student Agency Holding AS	None		Collective bargaining at company level
Eurowag AS	Freight transport by road	Private	1,000	None	None		No data

## Representativeness of the European social partner organisations: Road transport sector

<b>GERMANY</b> 	Size of road transport workforce: 838,800	Size of urban public transport workforce: 150,000	Collective bargaining coverage, urban public transport: 90%	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: 688,800	Collective bargaining coverage, rest of road transport: 24%	Rest of road transport: collective bargaining at sector and company levels

3 trade unions	There are three trade unions in Germany. Ver.di, an ETF member, is considered the largest union (it does not disclose its membership numbers) and organises in the whole road transport sector and also in urban public transport. The other two trade unions organise in urban public transport only; NahVG is the larger of these. EVG, a member of the ETF, is a smaller union in the urban public transport sector and also organises workers in the railway sector. All three trade unions are considered to be representative based on the principle of mutual recognition and all participate in the sectoral collective bargaining processes.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Ver.di (whole road transport)	Both urban public transport and the rest of road transport; no membership data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The largest trade union in the entire road transport sector is a member of the ETF. In urban public transport, the ETF's member is a smaller union. CESI's indirect member is the largest union in urban public transport. For the rest of road transport, the largest trade union is affiliated with the ETF.
EVG (urban public transport)	Urban public transport: ~3,500	3,500	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	
NahVG (urban public transport)	Urban public transport: 5,000	5,000	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	CESI (indirect, via dbb)	

## Representativeness of the European social partner organisations: Road transport sector

7 employer organisations	All employer organisations are considered to be representative in their domains based on the principle of mutual recognition and are involved in the sector's collective bargaining processes. There is one sectoral employer organisation in the whole road transport sector: BDO, which is a member of the IRU. In the rest of road transport, the two employer organisations are both considered representative and are involved in the sector's collective bargaining, mostly via their member companies. In urban public transport, there are four employer organisations: three represent urban passenger transport operators and one (BVTM) organises employers in a part of urban public transport, namely taxi operations.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in the Member State
BDO (whole road transport)	3,000	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	IRU	The IRU affiliates four of Germany's seven employer organisations. This includes employer organisations that organise in urban public transport or the rest of road transport only. The UITP organises one employer organisation, the professional public transport association that represents all public transport operators (VDV). In addition, direct members of the UITP also include the operators of public transport in all major cities in the country.
DSLVL (rest of road transport)	2,600	No members	No data	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
BGL (rest of road transport)	7,000	No members	7,000	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
VKA (urban public transport)	212	212	No data	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	None	

Representativeness of the European social partner organisations: Road transport sector


AVN (urban public transport)	71	71	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	None	
BVTM (urban public transport)	12,000	12,000	No members	Rest of road transport: no Urban public transport: no data	Rest of road transport: no Urban public transport: yes	IRU	
VDV (urban public transport)	295	295	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: no	UITP	

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) to which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Berliner Verkehrsbetriebe (BVG)	Metro, bus, tram, taxi	Public	15,800 (1.8%)	Ver.di	Kommunaler Arbeitgeberverband Berlin (KAV Berlin)	UITP, SGI Europe	Collective bargaining at company level
DB Schenker	Freight road transport, removal services	Private	15,800 (1.8%)	Ver.di	No data		Collective bargaining at sector level

## Representativeness of the European social partner organisations: Road transport sector

DHL Freight	Freight road transport	Private	13,000 (1.5%)	Ver.di	BDO	IRU	Collective bargaining at company level
<b>Three largest employers in urban public transport activities</b>							
BVG	Metro, bus, tram, taxi	Public	15,800 (10.5% of urban public transport employees)	Ver.di	KAV Berlin	UITP, SGI Europe	Collective bargaining at company level
Deutsche Bahn (DB) Regio Busse	Bus	Public	7,000 (bus lines) (5% of urban public transport employees)	EVG	The DB negotiates directly with the EVG for the bus drivers working in DB companies operating urban public transport bus lines		Collective bargaining at company level
Hamburger Hochbahn (HHA)	Metro, bus, ferry	Public	6,000 (4% of urban public transport employees)	Ver.di	HHA company agreement	UITP	Collective bargaining at company level
<b>Three largest employers in the rest of road transport</b>							
DB Schenker	Freight road transport, removal services	Private	15,800 (2.3% of the rest of road transport employees)	Ver.di	No data		Collective bargaining at sector level
DHL Freight	Freight road transport	Private	13,000 (1.9% of the rest of road transport employees)	Ver.di	None		Collective bargaining at company level
FLIX SE	Passenger road transport	Private	11,000 (1.7% of the rest of road transport employees)	Ver.di	None		No data

Representativeness of the European social partner organisations: Road transport sector

<b>DENMARK</b> 	Size of road transport workforce: 55,642 (2021)	Size of urban public transport workforce: 17,102 (2021)	Collective bargaining coverage, urban public transport: 75%	Urban public transport: collective bargaining at company and sector levels
		Size of rest of road transport workforce: 38,540 (2021)	Collective bargaining coverage, rest of road transport: 75–85%	Rest of road transport: collective bargaining at mostly sector level

3 trade unions	There are three trade unions in the sector in Denmark, one of which organises members across the whole road transport sector. All three unions are considered representative in their membership domains based on mutual recognition and all participate in collective bargaining processes at company and sectoral levels.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
3F (whole road transport)	42,000	7,000	37,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF affiliates all three trade unions in the country. It also affiliates the one trade union that organises workers across the road transport sector as a whole, is considered representative and participates in collective bargaining processes.  No other European associations have members in the country.
DJF (urban public transport)	1,392	1,392	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	
HK Privat (urban public transport)	500	500	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	

Representativeness of the European social partner organisations: Road transport sector

6 employer organisations	There are six employer organisations in the road transport sector in Denmark, three of which organise members across the road transport sector as a whole. All six employer organisations are considered representative in their domains based on the principle of mutual recognition.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
DPT (whole road transport)	2,100	1,700	140	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: no	IRU, UITP	The IRU organises four employer organisations in the country: two employer organisations organising across the whole road transport sector and two employer organisations active in the rest of road transport. All IRU members are considered representative and two of them participate in collective bargaining processes in their domains.  The UITP organises two employer organisations in the country, both of which organise across the whole road transport sector and are considered representative. One UITP member participates in collective bargaining in its domain.
DI (whole road transport)	625	76	549	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	IRU, UITP	
DE (whole road transport)	No data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	
KL (urban public transport)	3	3	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
ITD (rest of road transport)	700	No members	700	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
DTL (rest of road transport)	1,422	No members	1,422	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	




## Representativeness of the European social partner organisations: Road transport sector

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Arriva Danmark AS	Bus transport, interurban public transport	Public limited company. Multinational	1,400 (4%)	3F on scheduled bus passenger transport	DI	UITP	Collective bargaining at company and sector levels
Tide Bus Danmark AS	NACE 49.31.10	Stock company AS	Total number of employees, non-specified by NACE code: 1,328 (3.8%)	3F	Employers' Association of Tourist Coach Operators (ATV) in DI		Collective bargaining at company and sector levels
Keolis Danmark AS	NACE 49.31.10	Stock company AS	Total number of employees, non-specified by NACE code: 1,245 (3.5%)	3F	Employers' Association for Public Transport (AKT) in DI	UITP	Collective bargaining at company and sector levels
<b>Three largest employers in urban public transport activities</b>							
Arriva Danmark AS	Bus transport, interurban public transport	Public limited company. Multinational	1,400	3F on scheduled bus passenger transport	DI	UITP	Collective bargaining at company and sector levels
Tide Bus Danmark AS	NACE 49.31.10	Stock company AS	Total number of employees, non-specified by NACE code: 1,328	3F	ATV in DI		Collective bargaining at company and sector levels

Representativeness of the European social partner organisations: Road transport sector

Keolis Danmark AS	NACE 49.31.10	Stock company AS	Total number of employees, non-specified by NACE code: 1,245	3F	AKT in DI	UITP	Collective bargaining at company and sector levels
<b>Three largest employers in the rest of road transport</b>							
Frode Laursen AS	Freight transport by road	Stock company AS	1,025	3F	DI		Collective bargaining at sector level
Vikingbus Danmark AS	Passenger road transport	Stock company AS	996	3F	None		Collective bargaining at company level
Danske Fragtmænd AS	Freight transport by road	Stock company AS	875	3F	DI		Collective bargaining at sector level

Representativeness of the European social partner organisations: Road transport sector

<b>ESTONIA</b> 	Size of road transport workforce: 25,700	Size of urban public transport workforce: 3,000	Collective bargaining coverage, urban public transport: 66%	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: 22,700	Collective bargaining coverage, rest of road transport: 20%	Rest of road transport: collective bargaining at sector level

1 trade union	There is one trade union in the sector in Estonia, which organises members across the whole road transport sector. It is considered representative in its membership domains based on the legal statutory criteria and participates in collective bargaining processes at company and sectoral levels.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
ETTA (whole road transport)	1,200	1,000	200	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF affiliates the only trade union in the sector in Estonia, which organises workers across the road transport sector as a whole, is considered representative and participates in collective bargaining processes. No other European associations have members in the country.

Representativeness of the European social partner organisations: Road transport sector


2 employer organisations	There are two employer organisations in the road transport sector in Estonia, one of which organises members across the road transport sector as a whole. Both employer organisations are considered representative in their domains based on the legal statutory criteria.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
AEL (whole road transport)	53	12	41	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	The IRU organises one employer organisation in the country, which is considered representative in the rest of road transport sector but does not participate in collective bargaining processes. No other European associations have members in the country.
ERAA (rest of road transport)	250	No members	250	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Aktsiaselts Tallinna Linnatransport	NACE 49.31 – other urban and suburban passenger land transport	Public	4,200 (16%)	No data	AEL	UITP	Collective bargaining at company level
AS GoBus	NACE 49.39 – passenger road transport	Public	1,460 (6%)	No data	AEL		No data

## Representativeness of the European social partner organisations: Road transport sector

Aktsiaselts Technomar & Adrem	NACE 49.41 – freight transport by road	Public	645 (3%)	No data	ERAA		No data
<b>Three largest employers in urban public transport activities</b>							
Aktsiaselts Tallinna Linnatransport	NACE 49.31 – other urban and suburban passenger land transport	Public	2,100	No data	AEL	UITP	Collective bargaining at company level
AS GoBus	NACE 49.31 – other urban and suburban passenger land transport	Public	700	No data	AEL		Collective bargaining exists – unknown level
Aktsiaselts SEBE	NACE 49.31 – other urban and suburban passenger land transport	Public	350	No data	AEL		Collective bargaining exists – unknown level
<b>Three largest employers in the rest of road transport</b>							
Aktsiaselts Tallinna Linnatransport	NACE 49.39 – passenger road transport	Public	2,100	No data	AEL	UITP	No data
AS GoBus	NACE 49.39 – passenger road transport	Public	734	No data	AEL		No data
Aktsiaselts Technomar & Adrem	NACE 49.41 – freight transport by road	Public	645	No data	ERAA		No data

## Representativeness of the European social partner organisations: Road transport sector

<b>GREECE</b> 	Size of road transport workforce: 46,740	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: not known	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: no data	Collective bargaining coverage, rest of road transport: not known	Rest of road transport: collective bargaining at sector and company levels

8 trade unions	There are eight trade unions in the sector in Greece, one of which organises members across the whole road transport sector. It is considered representative in its membership domains based on mutual recognition and participates in collective bargaining processes at company and sectoral levels. The remaining seven unions are active in urban public transport activities and all are considered representative and participate in collective bargaining processes.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
OSME (whole road transport)	40,000	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	No European associations have members in the country.
POS-MET (urban public transport)	7,460	7,460	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: no	No affiliation	
Union of Employees and Subsidiary Companies of OASA (urban public transport)	3,300	3,300	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
Seoasth (urban public transport)	1,300	1,300	No members	Rest road transport: no Urban public transport: yes	Rest road transport: no Urban public transport: yes	No affiliation	

## Representativeness of the European social partner organisations: Road transport sector

Union of OASA Employees (urban public transport)	110	110	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
SELMA (urban public transport)	850	850	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
Union of STASY Employees (former Union of HSAP Employees) (urban public transport)	380	380	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
SET (urban public transport)	310	310	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	

2 employer organisations	There are two employer organisations in the road transport sector in Greece, one of which organises members in urban public transport activities (taxis), while the other organises members in the rest of road transport. Both employer organisations are considered representative in their domains based on the principle of mutual recognition.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Ποειατα (urban public transport)	120	120	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: no	IRU	The IRU organises both employer organisations in the country, which are considered representative in their respective domains but do not participate in collective bargaining processes.


## Representativeness of the European social partner organisations: Road transport sector

OFAE (rest of road transport)	22	No members	22	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	No other European associations have members in the country.
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	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Information is available only for urban public transport companies.							
<b>Three largest employers in urban public transport activities</b>							
Road Transport SA (OSY-OASA)	NACE 49.3 (buses and trolley buses)	Public	4,921 (as of 2023)	Union of Employees and Subsidiary Companies of OASA	OSY SA is a subsidiary of OASA (Athens Public Transport Organisation)	UITP	Collective bargaining at company level
Urban Rail Transport SS (STASY-OASA)	NACE 49.3 (metro, tram, Athens-Piraeus Electric Railway (former HSAP))	Public	2,280 (as of 2023)	SELMA, Union of STASY Employees, SET, Union of Electric Conductors & Other Traffic Workers in STASY SA (SHEK), Union of Electric Tram Drivers of Attica (SHTA), Union of Electric Conductors of Attiko Metro (SHAM), Union of Athens Metro Operation Control Centre Workers	STASY SA is a subsidiary of OASA	UITP	Collective bargaining at company level
Thessaloniki Urban Transport Organization (OASTH)	NACE 49.3 (buses)	Public	1,500 (as of 2023)	Seoasth	OASTH		Collective bargaining at company level
<b>Three largest employers in the rest of road transport</b>							
Information is available only for urban public transport companies.							



Representativeness of the European social partner organisations: Road transport sector

<b>SPAIN</b> 	Size of road transport workforce: 400,507	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 100%	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: 400,507	Collective bargaining coverage, rest of road transport: 100%	Rest of road transport: collective bargaining at sector level

14 trade unions	<p>There are 14 trade unions in the sector in Spain, three of which organise members across the whole road transport sector, are considered representative in their membership domains based on the legal statutory criteria and participate in collective bargaining processes in the sector.</p> <p>The remaining 11 unions are active in urban public transport activities, with four of these considered representative and nine participating in collective bargaining processes.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
FSC-CCOO (whole road transport)	34,000	10,000	24,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	<p>The ETF affiliates two trade unions, which organise members across the whole road transport sector, are considered representative in their membership domains based on the legal statutory criteria and participate in collective bargaining processes in the sector.</p> <p>No other European associations have members in the country.</p>
UGT-FeSMC (whole road transport)	34,000	12,000	22,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
CIG (whole road transport)	No data	No data	No data	Rest of road transport: no data Urban public transport: yes	Rest of road transport: no data Urban public transport: yes	No affiliation	
SIT (urban public transport)	1,100	1,100	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	

Representativeness of the European social partner organisations: Road transport sector

SLT (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
ELA (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
LAB (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
USO (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: no data	No affiliation	
CUT-Aragón (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: no data	No affiliation	
CSIF (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: yes	No affiliation	
Plataforma Sindical – EMT (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: yes	No affiliation	
SCMM (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: yes	No affiliation	

Representativeness of the European social partner organisations: Road transport sector

SU Metro (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: yes	No affiliation	
SO Metro (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: yes	No affiliation	

7 employer organisations	<p>There are seven employer organisations in the road transport sector in Spain, one of which organises members across the whole road transport sector and participates in collective bargaining processes in the sector.</p> <p>Three employer organisations organise members in urban public transport activities; they are considered representative and participate in collective bargaining processes in their domains.</p> <p>Three employer organisations organise members in the rest of road transport; all are considered representative and participate in collective bargaining processes in the sector.</p> <p>The employer organisations are considered representative in their domains based on the legal statutory criteria.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Confibus (whole road transport)	96,000	1,000	95,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	IRU	The IRU organises four employer organisations in the country, including one employer organisation organising across the whole road transport sector that is considered representative and participates in collective bargaining processes in its domains. One affiliate of the IRU organises in urban public transport activities and two organise in the rest of road transport (all are considered representative and
ASTIC (rest of road transport)	196 direct members, around 7,000 companies through province-level associations	No members	196 direct members, around 7,000 companies through province-level associations	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	

Representativeness of the European social partner organisations: Road transport sector

ATUC (urban public transport)	86	86	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: no	UITP	<p>participate in collective bargaining processes).</p> <p>The UITP organises one employer organisation (ATUC), in urban public transport activities, which is considered representative but does not participate in collective bargaining processes.</p> <p>The UITP also has other direct members, namely the public transport operators of the major cities.</p>
Antaxi (urban public transport)	53	53	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
Anetra (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	IRU	
CETM (rest of road transport)	31,000	No members	31,000	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
Fenadismer (rest of road transport)	22,000	No members	22,000	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	UETR, SMEUnited	


## Representativeness of the European social partner organisations: Road transport sector

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
ALSA	Passenger road transport	Private	14,981	FSC-CCOO, UGT-FeSMC and others in the group's different companies	Confibus	IRU, UITP	Collective bargaining at sector level
EMT Madrid	Bus	Public	9,366	Plataforma Sindical – EMT, FSC-CCOO, SICAM, SIT, CSIT-UP and UGT-FeSMC	ATUC (it is a business association)	UITP	Collective bargaining at company level
TMB	Bus, metro and tram	Public	8,516	ACTUB, FSC-CCOO, CGT, SIT and UGT-FeSMC	ATUC (it is a business association)	UITP	Collective bargaining at company level
<b>Three largest employers in urban public transport activities</b>							
EMT Madrid	Bus	Public	9,366	Plataforma Sindical – EMT, FSC-CCOO, SICAM, SIT, CSIT-UP and UGT-FeSMC	ATUC (it is a business association)	UITP	Collective bargaining at company level
TMB	Bus, metro and tram	Public	8,516	ACTUB, FSC-CCOO, CGT, SIT and UGT-FeSMC	ATUC (it is a business association)	UITP	Collective bargaining at company level
Metro Madrid	Metro	Public	7,219	SCMM, FSC-CCOO, UGT-FeSMC, SLMM, SO-MM and STMM	ATUC (it is a business association)	UITP	Collective bargaining at company level

Representativeness of the European social partner organisations: Road transport sector

Three largest employers in the rest of road transport							
ALSA	Passenger road transport	Private	14,981	FSC-CCOO, UGT-FeSMC and others in the group's different companies	Confibus	UITP	Collective bargaining at sector level
ACOTRAL	Freight transport by road	Private	3,616	FSC-CCOO and UGT-FeSMC	CETM		Collective bargaining at company level
No third largest company identified							

## Representativeness of the European social partner organisations: Road transport sector

 <b>FINLAND</b>	Size of road transport workforce: 40,000	Size of urban public transport workforce: 5,000	Collective bargaining coverage, urban public transport: 100%	Urban public transport: collective bargaining at sector level
		Size of rest of road transport workforce: 35,000	Collective bargaining coverage, rest of road transport: 100%	Rest of road transport: collective bargaining at mostly sector level

5 trade unions	There are five trade unions in the sector in Finland, two of which organise members across the whole road transport sector. All unions are considered representative in their membership domains based on mutual recognition and all participate in collective bargaining processes at sectoral level.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
AKT (whole road transport)	25,000	5,000	20,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF affiliates four out of the five trade unions in the country. Two of these trade unions organise workers across the road transport sector as a whole, are considered representative and participate in collective bargaining processes. No other European associations have members in the country.
ERTO (whole road transport)	No data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
JHL (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	
PAM (rest of road transport)	294	No members	294	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	
RAU (urban public transport)	400	400	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	

## Representativeness of the European social partner organisations: Road transport sector

6 employer organisations	There are six employer organisations in the road transport sector in Finland, with two employer organisations organising members across the road transport sector as a whole. All employer organisations are considered representative in their domains based on the principle of mutual recognition.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
ALT (whole road transport)	802	130	672	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	UITP	The IRU organises one employer organisation in the country, which organises in the rest of road transport, is considered representative and participates in collective bargaining processes in its domain. The UITP organises one employer organisation in the country, covering the whole road transport sector; it is considered representative and participates in collective bargaining in its domain.
PALTA (whole road transport)	15	No data	15	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	
Taksiliikenteen Työntajat ry (urban public transport)	36	36	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
KT (urban public transport)	2	2	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	



## Representativeness of the European social partner organisations: Road transport sector

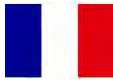
LAL (rest of road transport)	156	No data	156	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	No affiliation	
SKAL (rest of road transport)	4,100	No members	4,100	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Koiviston autokonserni	Passenger road transport	Private	2,500 (7%)	AKT	ALT		Collective bargaining at sector level
Posti Kuljetus Oy	Freight transport by road	Private	1,500 (4%)	AKT	ALT		Collective bargaining at sector level
Nobina	NACE 49.31	Private	1,400 (3.9%)	AKT	ALT		Collective bargaining at sector level
<b>Three largest employers in urban public transport activities</b>							
Koiviston autokonserni	NACE 49.31	Private	2,500	AKT	ALT		Collective bargaining at sector level

Representativeness of the European social partner organisations: Road transport sector

Nobina	NACE 49.31	Private	1,400	AKT	ALT		Collective bargaining at sector level
Pohjolan Liikenne (Part of VR Group)	NACE 49.31	Private	1,300+	AKT	ALT		Collective bargaining at sector level
<b>Three largest employers in the rest of road transport</b>							
Koiviston autokonserni	Passenger road transport	Private	2,500	AKT	ALT		Collective bargaining at sector level
Posti Kuljetus Oy	Freight transport by road		1,500	AKT	ALT		Collective bargaining at sector level
Nobina-konserni	Passenger road transport		1,400	AKT	ALT		Collective bargaining at sector level

Representativeness of the European social partner organisations: Road transport sector

<b>FRANCE</b> 	Size of road transport workforce: 578,300	Size of urban public transport workforce: 49,300	Collective bargaining coverage, urban public transport: 90–100% (employees)	Urban public transport: collective bargaining at sector level
		Size of rest of road transport workforce: 529,000	Collective bargaining coverage, rest of road transport: 100% (employees)	Rest of road transport: collective bargaining at sector level

7 trade unions	<p>There are seven trade unions in the sector in France, six of which organise members across the whole road transport sector, are considered representative in their membership domains based on the legal statutory criteria and participate in collective bargaining processes in the sector.</p> <p>The remaining union is active in urban public transport activities, is not considered representative and participates in collective bargaining processes.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
CFTC Transports (whole road transport)	3,000	No data	3,000	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: yes	ETF	<p>The ETF affiliates four of the trade unions in the sector, all of which organise members across the whole road transport sector, are considered representative in their membership domains based on the principle of legal statutory criteria and participate in collective bargaining processes in the sector. No other European associations have members in the country.</p>
FGTE CFDT (whole road transport)	50,000	No data	50,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
FNST CGT (whole road transport)	43,496	8,996	34,500	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
FNTL FO-UNCP (whole road transport)	40,000	10,000	30,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
CFE-CGC Transports (whole road transport)	8,000	No data	8,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	

Representativeness of the European social partner organisations: Road transport sector

UNSA Transports (whole road transport)	No data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	
UST Transports (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: yes	No affiliation	

12 employer organisations	<p>There are 12 employer organisations in the road transport sector in France, seven of which organise members in urban public transport activities, while the remaining five organise members in the rest of road transport.</p> <p>Six of the seven employer organisations in urban public transport are considered representative and participate in collective bargaining processes in the sector.</p> <p>In the rest of road transport, all five employer organisations are considered representative and four participate in collective bargaining processes in the sector.</p> <p>The employer organisations are considered representative in their domains based on the legal statutory criteria.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
UTP (urban public transport)	170	170	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	UITP	<p>The IRU organises 4 of the 12 employer organisations in the country, namely one employer organisation in urban public transport (not considered representative and not participating in collective bargaining) and three employer organisations in the rest of road transport (all considered representative and participating in collective bargaining processes).</p> <p>The UITP organises two employer organisations, namely one employer</p>
UNIT (urban public transport)	164	164	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	

Representativeness of the European social partner organisations: Road transport sector

CSNERT (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	<p>organisation in urban public transport and one in the rest of road transport. Both affiliates are considered representative and participate in collective bargaining processes in their domains.</p> <p>No other European associations have members in the country.</p>
FNTI (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
FNAT (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
FNDT (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
UNT (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	

Representativeness of the European social partner organisations: Road transport sector

FNTR (rest of road transport)	1,591	No members	1,591	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
Union TLF (rest of road transport)	No data	No members	No data	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	
OTRE (rest of road transport)	1,927	No members	1,927	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	UITP	
FNTV (rest of road transport)	1,276	No members	5,291	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
AFTRI (rest of road transport)	150	No members	150	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	

## Representativeness of the European social partner organisations: Road transport sector

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
RATP	Urban and suburban passenger land transport systems	Public	44,332	FNST CGT, FNTL FO-UNCP, UNSA Transports, CFE-CGC Transports	UTP	UITP	Collective bargaining at company and sector levels
Keolis	Passenger road transport	Private	27,000	CFTC Transports, FGTE CFDT, FNST CGT, FNTL FO-UNCP, CFE-CGC Transports, UNSA Transports	FNTV, UTP	UITP	Collective bargaining at company and sector levels
Transdev	Passenger road transport	Private	17,000	CFTC Transports, FGTE CFDT, FNST CGT, FNTL FO-UNCP, CFE-CGC Transports, UNSA Transports	FNTV, UTP	UITP	Collective bargaining at company and sector levels
<b>Three largest employers in urban public transport activities</b>							
RATP	Urban and suburban passenger land transport systems	Public	44,332	FNST CGT, FNTL FO-UNCP, UNSA Transports, CFE-CGC Transports	UTP	UITP	Collective bargaining at company and sector levels
Keolis	Urban and suburban passenger land transport systems	Private	27,000	No data	UTP, FNTV	UITP	Collective bargaining at company and sector levels
Transdev	Urban and suburban passenger land transport systems	Private	17,000	No data	UTP, FNTV	UITP	Collective bargaining at company and sector levels


Representativeness of the European social partner organisations: Road transport sector

Three largest employers in the rest of road transport							
Keolis	Passenger road transport	Private	It is difficult to obtain precise figures, as the three companies operate in both urban public transport and the rest of road transport and at national and international scales	CFTC Transports, FGTE CFDT, FNST CGT, FNTL FO-UNCP, CFE-CGC Transports, UNSA Transports	FNTV, UTP	UITP	Collective bargaining at company and sector levels
Transdev	Passenger road transport	Private		CFTC Transports, FGTE CFDT, FNST CGT, FNTL FO-UNCP, CFE-CGC Transports, UNSA Transports	FNTV, UTP	UITP	Collective bargaining at company and sector levels
RATP DEV (RATP's subsidiary company for the rest of road transport)	Passenger road transport	Private/subcontracted companies: Keolis and Transdev <sup>48</sup>			FNTV (note, other than these three companies, the remaining FNTV members are small and medium-sized enterprises)	UITP	

<sup>48</sup> Keolis and Transdev each have between 20,000 and 25,000 employees in the rest of road transport. They represent half of the employees in the sector. Small and medium-sized private companies employ the other half of workers.



Representativeness of the European social partner organisations: Road transport sector

<b>CROATIA</b> 	Size of road transport workforce: 8,900	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 60%	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: 8,900	Collective bargaining coverage, rest of road transport: 70%	Rest of road transport: collective bargaining at company level

5 trade unions	There are five trade unions in the sector in Croatia, one of which organises members across the whole road transport sector. All unions are considered representative in their membership domains based on the legal statutory criteria and all participate in collective bargaining processes at company level.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
SHV (whole road transport)	1,400	300	1,100	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	UICR	The UICR affiliates the one trade union that organises workers across the road transport sector as a whole, is considered representative and participates in collective bargaining processes.
SZH-ZET (urban public transport)	500	500	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
SVPRZZ (urban public transport)	350	350	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
SPIVH (rest of road transport)	1,200	No members	1,200	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	
USVPRH (rest of road transport)	900	No members	900	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	

## Representativeness of the European social partner organisations: Road transport sector


1 employer organisation	There is one employer organisation in the road transport sector in Croatia. It organises members across the road transport sector as a whole and is considered representative in the sector based on the legal statutory criteria.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
HUP-UP (whole road transport)	90	70% of the workforce in the urban public transport	90	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: no	No affiliation	No European associations have members in the country.

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
ZET Zagreb	Bus and tram	Public	3,600	SZH-ZET, SVPRZZ	Management of the company and Mayor of City of Zagreb. ZET Zagreb is not a member of an employer organisation		Collective bargaining at company level
Arriva	Passenger road transport	Private	4%	SPIVH	CEA-Transport Association	UITP	Collective bargaining at company level
Čazmatrans	Passenger road transport	Private	4%	SPIVH	CEA-Transport Association		Collective bargaining at company level
<b>Three largest employers in urban public transport activities</b>							

## Representativeness of the European social partner organisations: Road transport sector

ZET Zagreb	Bus and tram	Public	3,600	SVH-ZET, SVPRZZ	Management of the company and Mayor of the City of Zagreb. ZET Zagreb is not a member of an employer organisation		Collective bargaining at company level
Promet Split	Bus	Public	700	Sindikata vozača i prometnih radnika Split (Trade Union of Drivers and Transport Workers Split)	Management of the company and Mayor of the City of Split. Promet Split is not a member of an employer organisation		Collective bargaining at company level
GPP Osijek	Bus and tram	Public	340	Sindikata vozača i prometnih radnika Osijek (Trade Union of Drivers and Transport Workers Osijek)	Management of the company and Mayor of the City of Osijek. GPP Osijek is not a member of an employer organisation		Collective bargaining at company level
<b>Three largest employers in the rest of road transport</b>							
Čazmatrans	Passenger road transport	Private	4%	SPIVH	CEA-Transport Association		Collective bargaining at company level
Arriva	Passenger road transport	Private	4%	SPIVH	CEA-Transport Association	UITP	Collective bargaining at company level
Panturist	Passenger road transport	Private	0.5%	SPIVH	CEA-Transport Association		Collective bargaining at company level

Representativeness of the European social partner organisations: Road transport sector

<b>HUNGARY</b> 	Size of road transport workforce: 142,714	Size of urban public transport workforce: 22,714	Collective bargaining coverage, urban public transport: 80%	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: 120,000	Collective bargaining coverage, rest of road transport: 25%	Rest of road transport: collective bargaining at company level

5 trade unions	<p>There are five trade unions in the sector in Hungary, one of which organises members across the whole road transport sector, but is not considered representative and does not participate in collective bargaining processes in the sector.</p> <p>The other four unions are considered representative in their membership domains based on the legal statutory criteria and all participate in collective bargaining processes at company level.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
KSZOSZ (whole road transport)	1,550	450	1,100	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: no	ETF	<p>The ETF affiliates the one trade union that organises workers across the road transport sector as a whole; however, it is not considered representative and does not participate in collective bargaining processes.</p> <p>No other European associations have members in the country.</p>
EKSZ (urban public transport)	1,364	1,364	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	Indirectly affiliated with the ETF	
Metró KDSZ (urban public transport)	1,100	1,100	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
TESZ (rest of road transport)	2,005	No members	2,005	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	

Representativeness of the European social partner organisations: Road transport sector

KKSZ (rest road transport)	2,000	No members	2,000	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	
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4 employer organisations	There are four employer organisations in the road transport sector in Hungary, one of which organises members across the road transport sector as a whole and is considered representative in the sector based on the legal statutory criteria.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
MKFE (whole road transport)	2,627	127	2,500	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	IRU	The IRU organises 1 of the 4 employer organisations in the country, considered representative and participating in the collective bargaining processes.  Two other associations have a member in the country.
OTSZ (urban public transport)	100	100	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
N.i.T. (rest of road transport)	4,762	No members	4,762	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	Eurotra, ERSC	
Fuvosz (rest of road transport)	1,210	No members	1,210	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	No affiliation	


## Representativeness of the European social partner organisations: Road transport sector

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Volánbusz Rt	Passenger road transport	Public	18,299	Szolidaritás Autóbusz-közlekedési Szakszervezet (SZAKSZ), EKSZ	MKFE		Collective bargaining at company level
BKV Ltd	NACE 49.31	Public	10,345	EKSZ <ul style="list-style-type: none"> <li>• BKV Forgalmi és Kereskedelmi Igazgatóság Dolgozóinak Szakszervezete</li> <li>• BKV Gazdasági Igazgatóság Szakszervezete</li> <li>• BKV Füst Busz Üzemegység Munkástanácsa</li> <li>• BKV Füst Közlekedési Szakszervezet</li> <li>• Budapesti Közlekedési Dolgozók HÉV Dolgozók Szakszervezete</li> <li>• BKV Központi Dolgozók Szakszervezete</li> <li>• Budapesti Trolibuszközlekedési Dolgozók Szakszervezete</li> <li>• Fővárosi Villamosvasutak Szakszervezete</li> <li>• Fővárosi Közlekedési Dolgozók Demokratikus Szakszervezete</li> <li>• Független HÉV Szakszervezet – FHSZ</li> <li>• Kőbánya Autóbusz Szakszervezet – KÖASZ</li> <li>• Jegyellenőri Szakszervezet</li> </ul>		UITP	Collective bargaining at company level
Waberer's International Szállítmányozó és Fuvarozó Zrt	Freight transport by road	Public	5,857	Teherfuvarozók Európai Szövetsége (TESZ), Nemzetközi és Hivatásos Járművezetők Országos Szakszervezete Waberer's Csoport (National Union of International and Professional Drivers Waberer's Group, NeHOGSZ WI NyRt Csoport)	MKFE		Collective bargaining at company level

## Representativeness of the European social partner organisations: Road transport sector

Three largest employers in urban public transport activities							
BKV Ltd	NACE 49.31	Public	10,345	EKSZ <ul style="list-style-type: none"> <li>• BKV Forgalmi és Kereskedelmi Igazgatóság Dolgozóinak Szakszervezete</li> <li>• BKV Gazdasági Igazgatóság Szakszervezete</li> <li>• BKV Füst Busz Üzemegység Munkástanácsa</li> <li>• BKV Füst Közlekedési Szakszervezet</li> <li>• Budapesti Közlekedési Dolgozók HÉV Dolgozók Szakszervezete</li> <li>• BKV Központi Dolgozók Szakszervezete</li> <li>• Budapesti Trolibuszközlekedési Dolgozók Szakszervezete</li> <li>• Fővárosi Villamosvasutak Szakszervezete</li> <li>• Fővárosi Közlekedési Dolgozók Demokratikus Szakszervezete</li> <li>• Független HÉV Szakszervezet – FHSZ</li> <li>• Kőbánya Autóbusz Szakszervezet – KÖASZ</li> <li>• Jegyellenőri Szakszervezet</li> </ul>		UITP	Collective bargaining at company level
MVK Zrt	NACE 49.31	Public	691	Miskolci Tömegközlekedési Dolgozók Szakszervezete (MTDSZ), Miskolci Autóbusz és Villamosvezetők Érdekvédelmi Szervezete, MVK Zrt. Forgalmi Érdekvédelmi és Érdekképviseleti Szervezet			Collective bargaining at company level
DKV Zrt	NACE 49.31	Public	644	DKV Forgalmi Munkavállalók Független Szakszervezete			Collective bargaining at company level
Three largest employers in the rest of road transport							
Volánbusz Rt	Passenger road transport	Public	18,299	SZAKSZ, EKSZ	MKFE		Collective bargaining at company level
Waberer's International Szállítványozó és Fuvarozó Zrt	Freight transport by road	Public	5,857	TESZ, NeHOGSZ WI NyRt Csoport	MKFE		Collective bargaining at company level
Gartner Intertrans Hungária Kft	Freight transport by road	Public	1,260	Zala county Liga Trade Union	MKFE		None

Representativeness of the European social partner organisations: Road transport sector

<b>IRELAND</b> 	Size of road transport workforce: 78,100	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 90%	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: 100,900	Collective bargaining coverage, rest of road transport: 10%	Rest of road transport: collective bargaining at company level

4 trade unions	There are four trade unions in the sector in Ireland, with three of them organising members across the whole road transport sector. The other union organises members in urban public transport activities only. All four unions are considered to be representative in their membership domains based on the principle of mutual recognition.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
NBRU (whole road transport)	3,900	3,900	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	The ETF affiliates two trade unions (including the largest) that organise workers across the road transport sector as a whole; they are considered to be representative and participate in collective bargaining processes. Four European associations have a member in the country.
TSSA (whole road transport)	782	782	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	
SIPTU (whole road transport)	5,512	4,402	1,110	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF, ITF, ETUI, IndustriAll Europe	
Connect (urban public transport)	150	150	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	



Representativeness of the European social partner organisations: Road transport sector


2 employer organisations	There are two employer organisations in the road transport sector in Ireland, both of which organise companies in the rest of road transport and are considered to be representative in the sector based on the principle of mutual recognition. There is no employer organisation in urban public transport activities specifically.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
IRHA (rest of road transport)	1,000	No members	1,000	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	The IRU affiliates one of the employer organisations in the country, which is considered representative and participates in collective bargaining processes in the sector.
FTAI (rest of road transport)	240	No members	240	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	No affiliation	No other European associations have members in the country.

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Bus Eireann	Bus services, passenger road transport	Public	5,702	SIPTU, NBRU, TSSA, UNITE, Connect	Subsidiary of CIE, which is a member of Ibec	UITP	Collective bargaining at company level
Irish Rail	Regional rail	Public	4,058	SIPTU, NBRU, TSSA, UNITE, Connect	Subsidiary of CIE, which is a member of Ibec	UITP	Collective bargaining at company level
Dublin Bus	Dublin area bus services	Public	3,573	SIPTU, NBRU, TSSA, UNITE, Connect	Subsidiary of CIE, which is a member of Ibec	UITP	Collective bargaining at company level

Representativeness of the European social partner organisations: Road transport sector

<b>Three largest employers in urban public transport activities</b>							
Irish Rail	Regional rail	Public	4,058	SIPTU, NBRU, TSSA, UNITE, Connect	Subsidiary of CIE, which is a member of Ibec	UITP	Collective bargaining at company level
Bus Eireann	Bus services	Public	2,702	SIPTU, NBRU, TSSA, UNITE, Connect	Subsidiary of CIE, which is a member of Ibec	UITP	Collective bargaining at company level
Dublin Bus	Dublin area bus services	Public	3,573	SIPTU, NBRU, TSSA, UNITE, Connect	Subsidiary of CIE, which is a member of Ibec	UITP	Collective bargaining at company level
<b>Three largest employers in the rest of road transport</b>							
Bus Eireann	Passenger road transport	Public	3,000	SIPTU, NBRU, TSSA, UNITE, Connect	A subsidiary of CIE	UITP	Collective bargaining at company level
Go Ahead	Passenger road transport	Private	600	SIPTU, NBRU	No data		Collective bargaining at company level
Ballyvesey holdings	Freight transport by road	Private	2,582 (UK and Ireland)	No data	No data		No data

## Representativeness of the European social partner organisations: Road transport sector

<b>ITALY</b> 	Size of road transport workforce: no data	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 95%	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: no data	Collective bargaining coverage, rest of road transport: 95%	Rest of road transport: collective bargaining at sector and company levels

3 trade unions	There are three trade unions in the sector in Italy, all of which organise members across the whole road transport sector. All three unions are considered representative in their membership domains based on the principle of mutual recognition.						
	Members the in whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
FILT-CGIL (whole road transport)	No data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF affiliates all three trade unions in the country, all of which organise workers across the road transport sector as a whole, are considered representative and participate in collective bargaining processes. No other European associations have members in the country.
FIT-CISL (whole road transport)	No data	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	
UILTrasporti (whole road transport)	21,000	20,000	1,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	

6 employer organisations	There are six employer organisations in the road transport sector in Italy, one of which organises companies across the whole of the road transport sector, is considered representative and participates in collective bargaining processes in the sector. In addition, two employer organisations are active in urban public transport activities and the remaining three employer organisations are active in the rest of road transport. All employer organisations where data are available are considered representative in the sector based on the principle of mutual recognition.
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## Representativeness of the European social partner organisations: Road transport sector

	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
ANAV (whole road transport)	526	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	UITP, IRU	The IRU affiliates four of the employer organisations in the country, including one employer organisation organising companies across the whole road transport sector, which is considered representative and participates in collective bargaining processes in the sector. The same employer organisation is also a member of the UITP. The UITP organises two employer organisations in the country, including one employer organisation organising companies across the whole road transport sector, which is considered representative and participates in collective bargaining processes in the sector. The second affiliated employer organisation is active in urban public transport activities. No other European associations have members in the country.
Asstra (urban public transport)	153	153	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	UITP	
AGENS (urban public transport)	No data	No data	No members	Rest of road transport: no Urban public transport: no data	Rest of road transport: no Urban public transport: no data	No data	
ANAV (rest of road transport)	2,000	No members	2,000	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
Fiapautotransporti (rest of road transport)	No data	No members	No data	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
Confetra (rest of road transport)	No data	No members	No data	Rest of road transport: no data Urban public transport: no	Rest of road transport: no data Urban public transport: no	IRU	


Representativeness of the European social partner organisations: Road transport sector

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Ferrovie dello Stato Italiane	Urban and suburban passenger land transport systems	Public	82,000	FILT-CGIL, FIT-CISL, UILTrasporti	No data available	UITP	Collective bargaining at sector and company levels
Agenzia del trasporto autoferrotranviario del Comune di Roma (ATAC)	Urban and suburban passenger land transport systems	Public	11,000	FILT-CGIL, FIT-CISL, UILTrasporti	No data available	UITP	Collective bargaining at sector level
Azienda Trasporti Milanesi (ATM)	Urban and suburban passenger land transport systems	Public	10,000	FILT-CGIL, FIT-CISL, UILTrasporti	No data available	UITP	Collective bargaining at sector level
<b>Three largest employers in urban public transport activities</b>							
Ferrovie dello Stato Italiane	Urban and suburban passenger land transport systems	Public	82,000	FILT-CGIL, FIT-CISL, UILTrasporti	No data available	UITP	Collective bargaining at sector and company levels
ATAC	Urban and suburban passenger land transport systems	Public	11,000	FILT-CGIL, FIT-CISL, UILTrasporti	No data available	UITP	Collective bargaining at sector level
ATM	Urban and suburban passenger land transport systems	Public	10,000	FILT-CGIL, FIT-CISL, UILTrasporti	No data available	UITP	Collective bargaining at sector level

Representativeness of the European social partner organisations: Road transport sector

Three largest employers in the rest of road transport							
Savino del Bene	Freight transport by road	Private	5,000	FILT-CGIL, FIT-CISL, UILTrasporti	No data available		Collective bargaining at sector level
Arcese	Freight transport by road	Private	2,800	FILT-CGIL, FIT-CISL, UILTrasporti	No data available		Collective bargaining at sector level
Fercam	Freight transport by road	Private	2,200	FILT-CGIL, FIT-CISL, UILTrasporti	No data available		Collective bargaining at sector level

## Representativeness of the European social partner organisations: Road transport sector

<b>LITHUANIA</b> 	Size of road transport workforce: 99,765	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 45%	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: 99,765	Collective bargaining coverage, rest of road transport: 10%	Rest of road transport: collective bargaining at company level

4 trade unions	There are four trade unions in the sector in Lithuania, with one of them organising members across the whole road transport sector, considered representative and participating in collective bargaining processes in the sector. In addition, one union organises members in urban public transport activities and the remaining two unions organise members in the rest of road transport. All of the unions are considered representative in their membership domains based on the principle of mutual recognition and participate in collective bargaining processes in the sector in their domains.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
LKADPSF (whole road transport)	1,310	450	860	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF affiliates all four trade unions in the country, including the one trade union that organises workers across the road transport sector as a whole, is considered representative and participates in collective bargaining processes. No other European associations have members in the country.
TDF (urban public transport)	1,450	1,450	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ETF	
BTPS 'Solidarumas' (rest of road transport)	2,000	No members	2,000	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	ETF	
LVPS (rest of road transport)	800	No members	800	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	ETF	

Representativeness of the European social partner organisations: Road transport sector

3 employer organisations	<p>There are three employer organisations in the road transport sector in Lithuania, two of which organise companies across the whole of the road transport sector – both are considered representative and one participates in collective bargaining processes in the sector. The remaining employer organisation organises companies in the rest of road transport.</p> <p>All of the employer organisations are considered representative in the sector based on the principle of mutual recognition.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Linava (whole road transport)	707	27	680	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	IRU	The IRU affiliates one of the employer organisations in the country, which organises companies across the whole road transport sector, is considered representative and participates in collective bargaining processes in the sector.
LKVA (whole road transport)	34	21	13	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: no	No affiliation	
TTLA (rest of road transport)	25	No members	25	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	CORTE	





## Representativeness of the European social partner organisations: Road transport sector

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Trantorloja	Freight transport by road	Private	Up to 2,700	LVPS (does not 'organise', but in a few cases LVPS has represented company employees in the courts)	Linava		None
Girmeta	Freight transport by road	Private	Up to 2,600	Trade Union of Girmeta			Collective bargaining at company level
Vilniaus viešasis transportas (VVT)	NACE 49.31	Owned by municipality	~1,800	Trade Union of VVT Employees, Independent Trade Union of Public Transport Employees, Unified Trade Union of Public Transport Employees	Linava		Collective bargaining at company level
<b>Three largest employers in urban public transport activities</b>							
VVT	NACE 49.31	Owned by municipality	~1,800	Trade Union of VVT Employees, Independent Trade Union of Public Transport Employees, Unified Trade Union of Public Transport Employees	Linava		Collective bargaining at company level
Kauno autobusai (KA)	NACE 49.31	Owned by municipality	~1,700	Trade Union of KA Employees, Trade Union of Employees of Kaunas' Transport Companies, Trade Union of KA's Public Transport Employees	Confederation of Lithuanian Employers, LKVA		Collective bargaining at company level

Representativeness of the European social partner organisations: Road transport sector

Klaipėdos autobusų parkas (KAP)	NACE 49.31	Owned by municipality	~320	Trade Union of KAP Employees	Linava		Collective bargaining at company level
<b>Three largest employers in the rest of road transport</b>							
Transorloja	Freight transport by road	Private	Up to 2,700	LVPS (does not 'organise', but in a few cases LVPS has represented company employees in the courts)	Linava		None
Girmeta	Freight transport by road	Private	Up to 2,600	Trade Union of Girmeta			Collective bargaining at company level
Manvesta	Freight transport by road	Private	Up to 2,300		Linava, TTLA		None

Representativeness of the European social partner organisations: Road transport sector

<b>LUXEMBOURG</b>  	Size of road transport workforce: no data	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 100%	Urban public transport: collective bargaining at sector level
		Size of rest of road transport workforce: no data	Collective bargaining coverage, rest of road transport: 100%	Rest of road transport: collective bargaining at sector level

3 trade unions	<p>There are three trade unions in the road transport sector in Luxembourg, two of which organise members across the whole road transport sector, are considered representative and participate in collective bargaining processes in the sector. One union organising in urban public transport activities is not considered representative and does not participate in collective bargaining processes in the sector.</p> <p>The unions are considered representative in their membership domains based on the legal statutory criteria.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
OGB-L Road Transport and Navigation Trade Union (whole road transport)	2,200	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	<p>The ETF affiliates all three trade unions, including two trade unions that organise workers across the road transport sector as a whole, are considered representative and participate in collective bargaining processes.</p> <p>No other European associations have members in the country.</p>
LCGB-Transport (whole road transport)	5,000	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
Syprolux (urban public transport)	1,900	1,900	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: no	ETF	

3 employer organisations	<p>There are three employer organisations in the road transport sector in Luxembourg, two organising companies in urban public transport activities and one organising employer organisations in the rest of road transport.</p> <p>All employer organisations are considered representative and participate in collective bargaining processes in the sector in their domains.</p> <p>All employer organisations are considered representative in the sector based on the principle of mutual recognition.</p>
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Representativeness of the European social partner organisations: Road transport sector

	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
FLEAA (urban public transport)	33	33	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	IRU, UITP	The IRU affiliates two of the employer organisations in the country, and the UITP also affiliates one of these. Both of the IRU-affiliated employer organisations are considered representative and participate in collective bargaining processes in the sector in their domains. The UITP also has direct members: Luxtram SA and the Service des transports en commun de la ville de Luxembourg.
Federation of Taxis, Cars and Ambulances (urban public transport)	50	50	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
GT (rest of road transport)	170	No members	170	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Sales Lentz Group	Bus	Private	1,124 (2021)	LCGB-Transport, OGB-L Road Transport and Navigation Trade Union	FLEAA		Collective bargaining at sector level
Voyages Emile Weber	Bus	Private	1,010 (2021)	OGB-L Road Transport and Navigation Trade Union, LCGB-Transport	FLEAA		Collective bargaining at sector level


Representativeness of the European social partner organisations: Road transport sector

Arthur Welter Transports SARL	Freight transport by road	Private	435	LCGB-Transport, OGB-L Road Transport and Navigation Trade Union	GT		Collective bargaining at sector level
<b>Three largest employers in urban public transport activities</b>							
Sales Lentz Group	Bus	Private	1,124 (2021)	LCGB-Transport, OGB-L Road Transport and Navigation Trade Union	FLEAA		Collective bargaining at sector level
Voyages Emile Weber	Bus	Private	1,010 (2021)	OGB-L Road Transport and Navigation Trade Union, LCGB-Transport	FLEAA		Collective bargaining at sector level
Demy Schandeler	Bus	Private	357 (2021)	OGB-L Road Transport and Navigation Trade Union, LCGB-Transport	FLEAA		Collective bargaining at sector level

Representativeness of the European social partner organisations: Road transport sector

<b>Three largest employers in the rest of road transport activities</b>							
Arthur Welter Transports SARL	Freight transport by road	Private	435	LCGB-Transport, OGB-L Road Transport and Navigation Trade Union	GT		Collective bargaining at sector level
Wallenborn Transports SA	Freight transport by road	Private	362	LCGB-Transport, OGB-L Road Transport and Navigation Trade Union	GT		Collective bargaining at sector level
Magetralux SA	Freight transport by road	Private	251	LCGB-Transport, OGB-L Road Transport and Navigation Trade Union	GT		Collective bargaining at sector level

Representativeness of the European social partner organisations: Road transport sector

<b>LATVIA</b> 	Size of road transport workforce: 38,895	Size of urban public transport workforce: 13,130	Collective bargaining coverage, urban public transport: 50%	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: 25,765	Collective bargaining coverage, rest of road transport: no data	Rest of road transport: collective bargaining at company level

1 trade union	There is one trade union in the sector in Latvia, which organises members across the whole road transport sector, is considered representative and participates in collective bargaining processes in the sector. The union is considered representative in its membership domains based on the legal statutory criteria.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
LAKRS (whole road transport)	925	310	615	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF affiliates the only trade union in the sector in Latvia, which organises workers across the road transport sector as a whole, is considered representative and participates in collective bargaining processes. No other European associations have members in the country.

2 employer organisations	There are two employer organisations in the road transport sector in Latvia, one of which organises companies across the whole of the road transport sector and is considered representative. The other employer organisation organises companies in the rest of road transport. Neither of the employer organisations participates in collective bargaining processes in the sector (there is no sectoral collective bargaining, and collective bargaining takes place at company level). Both employer organisations are considered representative in the sector based on the legal statutory criteria.
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## Representativeness of the European social partner organisations: Road transport sector

	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
LPPA (whole road transport)	24	8	16	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: no	No affiliation	The IRU affiliates one of the employer organisations in the country, which organises companies in the rest of road transport, is considered representative and does not participate in collective bargaining processes in the sector. No other European associations have members in the country.
Latvijas auto (rest of road transport)	395	No members	395	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	


	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Rigas satiksme	Urban and suburban passenger land transport systems	Municipal limited liability company	3,700	Company-level union(s)	LPPA	UITP	Collective bargaining at company level
Kreiss	Freight transport by road	Private	2,427	No data, most likely none	Latvijas auto		No data
Daugavpils satiksme	Urban and suburban passenger land transport systems	Municipal joint-stock company	500	No data	None		No data
<b>Three largest employers in urban public transport activities</b>							
Rigas satiksme	Urban and suburban passenger land transport systems	Municipal limited liability company	3,700	Company-level union(s)	LPPA	UITP	Collective bargaining at company level
Daugavpils satiksme	Urban and suburban passenger land transport systems	Municipal joint-stock company	500	No data	None		No data



Representativeness of the European social partner organisations: Road transport sector

CATA	Urban and suburban passenger land transport systems	Joint-stock company	450	LAKRS	LPPA		Collective bargaining at company level
<b>Three largest employers in rest of road transport activities</b>							
Kreiss	Freight transport by road	Private	2,427	No data, most likely none	Latvijas auto		No data
CATA	Passenger road transport	Private	455	LAKRS	LPPA		Collective bargaining at company level
Nordeka	Passenger road transport	Private	328	LAKRS	None		Collective bargaining at company level

Representativeness of the European social partner organisations: Road transport sector

<b>MALTA</b> 	Size of road transport workforce: 3,200	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 40%	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: 3,200	Collective bargaining coverage, rest of road transport: 0%	Rest of road transport: no collective bargaining at sector or company level

2 trade unions	<p>There are two trade unions in the road transport sector in Malta, one of which organises members across the whole road transport sector and is considered representative but does not participate in collective bargaining processes in the sector. The other union organises in urban public transport activities, is not considered representative and participates in collective bargaining processes in urban public transport activities.</p> <p>The unions are considered representative in their membership domains based on the legal statutory criteria.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
GWU (whole road transport)	200	200	Very small	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: no	ETF	The ETF affiliates one trade union, which organises workers across the road transport sector as a whole and is considered representative but does not participate in collective bargaining processes. No other European associations have members in the country.
UHM (urban public transport)	694	694	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: yes	No affiliation	

3 employer organisations	<p>There are three employer organisations in the road transport sector in Malta, one of which organises companies across the whole sector and is considered representative but does not participate in collective bargaining processes in the sector. The other two employer organisations affiliate members in the rest of road transport and are considered representative but do not participate in collective bargaining processes in the sector in their domains.</p> <p>All employer organisations are considered representative in the sector based on the legal statutory criteria.</p>
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## Representativeness of the European social partner organisations: Road transport sector


	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
MEA (whole road transport)	20	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: no	No sectoral affiliation, SGI Europe member	The IRU affiliates one employer organisation in the country, which is active in the rest road transport and is considered representative but does not participate in collective bargaining in its domains. The two other employer organisations are affiliated with cross-sectoral European associations and are considered representative.
Malta's Chamber of SMEs (rest of road transport)	40% of the rest of road transport	No members	40% of companies	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	No sectoral affiliation, SMEUnited member	
ATTO (rest of road transport)	6	No members	6	Rest of road transport: yes Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Malta Public Transport	Buses	Private	1,300	UHM	MEA	UITP	No data
Insufficient data to assess the second or third largest employers							
<b>Three largest employers in urban public transport activities</b>							
Malta Public Transport	Buses	Private	1,300	UHM	MEA	UITP	No data
Bolt	Private transport service	Private	No data	None	MEA		No data
E Cabs	Private transport service	Private	No data	None	No data		No data

Representativeness of the European social partner organisations: Road transport sector

<b>Three largest employers in the rest of road transport</b>							
Paramount Coaches	Passenger road transport	Private	No data	None	MEA		None
Fahrenheit Logistics Ltd	Freight transport by road	Private	No data	None	MEA, ATTO		None
Attrans Ltd	Freight transport by road	Private	No data	None	ATTO		None

Representativeness of the European social partner organisations: Road transport sector

<b>NETHERLANDS</b> 	Size of road transport workforce: 210,000	Size of urban public transport workforce: 50,000–60,000	Collective bargaining coverage, urban public transport: 80%	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: around 150,000	Collective bargaining coverage, rest of road transport: 95%	Rest of road transport: collective bargaining at sector and company levels

3 trade unions	<p>There are three trade unions in the sector in the Netherlands, two of which organise members across the whole road transport sector, are considered representative and participate in collective bargaining processes in the sector. The other union organises in the rest of road transport, is considered representative and participates in collective bargaining processes in its domain.</p> <p>The unions are considered representative in their membership domains based on the principle of mutual recognition.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
FNV (whole road transport)	19,350	12,350	7,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	<p>The ETF affiliates two trade unions, both of which organise workers across the road transport sector as a whole, are considered representative and participate in collective bargaining processes.</p> <p>No other European associations have members in the country.</p>
CNV (whole road transport)	10,000	2,000–3,000	7,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
De Unie (rest of road transport)	2,000	No members	2,000	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	

6 employer organisations	<p>There are six employer organisations in the road transport sector in the Netherlands, one of which organises companies across the whole sector, is considered representative and participates in collective bargaining processes in the sector. There are two employer organisations in urban public transport activities and three employer organisations in the rest of road transport. Four of these are considered representative in their domains and participate in collective bargaining processes in the sector.</p> <p>All employer organisations are considered representative in the sector based on the principle of mutual recognition.</p>
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Representativeness of the European social partner organisations: Road transport sector

	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
KNV (whole road transport)	316	168	148	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: yes	IRU, UITP	<p>The IRU directly affiliates two employer organisations in the country, one of which is active in the whole road transport sector, is considered representative and participates in collective bargaining processes in its domains.</p> <p>Two more employer organisations are indirectly affiliated with the IRU.</p> <p>The UITP affiliates two employer organisations, one of which is active in the whole road transport sector, is considered representative and participates in collective bargaining processes in its domains.</p> <p>Other European associations with a member in the country are ECTA and Clecat.</p>
VWOV (urban public transport)	6	6	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	IRU indirectly through KNV	
VSV (urban public transport)	7	7	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	UITP	
TLN (rest of road transport)	4,700	No members	4,700	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU, ECTA, Clecat	
Evofenedex (rest of road transport)	10,000	No members	10,000	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: no	IRU	
VVT (rest of road transport)	170	No members	170	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU indirectly	

Representativeness of the European social partner organisations: Road transport sector


	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector (GVB and DHL share the third place, as they have the same number of employees)</b>							
Connexion/Transdev	(Regional) bus transport, (some) regional rail transport lines, care transport	Private	6,000	FNV, CNV	VWVOV	UITP	Collective bargaining at sector level
Arriva	(Regional) bus transport, (some) regional rail transport lines	Private	5,500	FNV, CNV	VWVOV	UITP	Collective bargaining at sector level
GVB	Urban public transport in Amsterdam by bus, tram, metro and ferry	Private, but owned by the Municipality of Amsterdam	5,000	FNV, ABGP (merged with CNV on 1 January 2023)	OV-NL (branch organisation)	UITP	Collective bargaining at company level
DHL	Freight transport by road	Private	5,000	FNV, CNV	TLN		Collective bargaining at company level
<b>Three largest employers in urban public transport activities</b>							
Connexion/Transdev	(Regional) bus transport, (some) regional rail transport lines, care transport	Private	6,000	FNV, CNV	VWVOV	UITP	Collective bargaining at sector level
Arriva	(Regional) bus transport, (some) regional rail transport lines	Private	5,500	FNV, CNV	VWVOV	UITP	Collective bargaining at sector level
GVB	Urban public transport in Amsterdam by bus, tram, metro and ferry	Private, but owned by the Municipality of Amsterdam	5,000	FNV, ABGP (merged with CNV on 1 January 2023)	OV-NL (branch organisation)	UITP	Collective bargaining at company level

Representativeness of the European social partner organisations: Road transport sector

Three largest employers in the rest of road transport							
DHL	Freight transport by road	Private	5,000	FNV, CNV	TLN		Collective bargaining at company level
DSV Solutions Road	Freight transport by road	Private	>2,000	FNV	None found		Collective bargaining at company level
CEVA Logistics	Freight transport by road	Private	~2,000	FNV, BVPP	None found		Collective bargaining at company level



Representativeness of the European social partner organisations: Road transport sector

<b>POLAND</b> 	Size of road transport workforce: 750,000	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: no data	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: ~750,000	Collective bargaining coverage, rest of road transport: no data	Rest of road transport: collective bargaining at company level

4 trade unions	<p>There are four trade unions in the sector in Poland, one of which organises members across the whole road transport sector and is considered representative but does not participate in collective bargaining processes in the sector. Two further unions organise in urban public transport activities, where they are considered representative, but only one of these unions participates in collective bargaining processes. The remaining union organises in the rest of road transport, where it is considered representative and does not participate in collective bargaining processes.</p> <p>The unions are considered representative in their membership domains based on the legal statutory criteria.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
OPZZ (whole road transport)	4,700	1,400	4,300	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: no	ETF	<p>The ETF affiliates two trade unions, both of which are considered representative in their domains but do not participate in collective bargaining processes.</p> <p>No other European associations have members in the country.</p>
KS KM NSZZ 'Solidarność' (urban public transport)	6,004	6,004	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: no	No ETF affiliation for this section of Solidarność	
ZZPKMwRP (urban public transport)	2,800	2,800	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
KSTD NSZZ 'Solidarność' (rest of road transport)	1,000	No members	1,000	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: no	ETF	

## Representativeness of the European social partner organisations: Road transport sector

3 employer organisations	<p>There are three employer organisations in the road transport sector in Poland, two of which organise companies in urban public transport activities and the third organises companies in the rest of road transport. All of the employer organisations are considered representative and one participates in collective bargaining processes in the sector.</p> <p>All employer organisations are considered representative in the sector based on the legal statutory criteria.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
FOT (urban public transport)	26	26	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: no	No affiliation	<p>One employer organisation is indirectly affiliated with the IRU, which organises companies in the rest of road transport. The UITP affiliates one employer organisation, IGMK, which is representative but not active in collective bargaining.</p>
Pracodawcy RP (rest of road transport)	2,400	No members	2,400	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	Indirectly via its membership of the IRU	
IGMK (urban public transport)	157	157	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: no	UITP	


## Representativeness of the European social partner organisations: Road transport sector

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Grupa Raben	Freight	Private	0.74%	No data	No data	No data	No data
DPD Polska	Freight	Private	Less than 1%	No data	No data	No data	No data
DSV	Freight	Private	Less than 1%	No data	No data	No data	No data
<b>Three largest employers in urban public transport activities</b>							
ZTM Warszawa	NACE 49.31 (metro, railway, bus, trams)	Public	~10,000 (without subcontractors)	Związek Zawodowy Pracowników Kolei Miejskiej, Komisja Międzyzakładowa OM NSZZ 'Solidarność' MZA i TW, Związek Zawodowy 'Kontra'	IGMK, Polski Związek Pracodawców Transportu Publicznego (PZPTP)	UITP	None
MPK Kraków	NACE 49.31 (bus, trams)	Public	2,297	Związek Zawodowy Pracowników Komunikacji Miejskiej w Krakowie	IGMK, PZPTP		None

Representativeness of the European social partner organisations: Road transport sector

MPK Łódź	NACE 49.31 (bus, trams)	Public	~3,000	Związek Zawodowy Kierowców i Motorniczych Komunikacji Miejskiej w Łodzi, Komisja Międzyzakładowa NSZZ Solidarność MPK Łódź	IGMK		No data
<b>Three largest employers in the rest of road transport</b>							
Grupa Raben	Freight	Private	0.74%	No data	No data	No data	No data
DPD Polska	Freight	Private	Less than 1%	No data	No data	No data	No data
DSV	Freight	Private	Less than 1%	No data	No data	No data	No data

Representativeness of the European social partner organisations: Road transport sector

<b>PORTUGAL</b> 	Size of road transport workforce: 86,360	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 70%	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: 86,380	Collective bargaining coverage, rest of road transport: 72%	Rest of road transport: collective bargaining at sector and company levels

11 trade unions	<p>There are 11 trade unions in the road transport sector in Portugal, five of which organise members across the whole road transport sector, are considered representative and participate in collective bargaining processes in the sector. Four unions organise members in urban public transport activities, are considered representative and participate in collective bargaining processes in the sector.</p> <p>The remaining two unions organise members in the rest of road transport, are considered representative and participate in collective bargaining processes in their domains.</p> <p>The unions are considered representative in their membership domains based on the principle of mutual recognition.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Fectrans (whole road transport)	9,500	1,500	8,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	There are no ETF affiliates in the country. ALE has one affiliate in the country, which organises members in urban public transport activities.  No other European associations have members in the country.
SITRA (whole road transport)	4,500	1,000	3,500	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	
SNMOT (whole road transport)	4,900	900	4,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	
STRUN (whole road transport)	2,400	400	2,000	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	

Representativeness of the European social partner organisations: Road transport sector

Sttamp (whole road transport)	600	300	300	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	
SMAQ (urban public transport)	600	600	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	ALE	
ASPTC (urban public transport)	500	500	No members	Rest of road transport: no Urban public transport: no data	Rest of road transport: no Urban public transport: no data	No data	
STTM (urban public transport)	200	200	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
SMTP (urban public transport)	170	170	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
SIMM (rest of road transport)	200	No members	200	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	
Simmper (rest of road transport)	100	No members	100	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	No affiliation	

## Representativeness of the European social partner organisations: Road transport sector

4 employer organisations	<p>There are four employer organisations in the road transport sector in Portugal, one of which organises companies across the whole sector, is considered representative and participates in collective bargaining processes in the rest of road transport. One employer organisation organises companies in urban public transport only, and two employer organisations organise companies in the rest of road transport. All four employer organisations are considered representative in their domains and participate in collective bargaining processes in the sector.</p> <p>All employer organisations are considered representative in the sector based on the principle of mutual recognition.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Antrop (whole road transport)	81	12	69	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: no	UITP	<p>The IRU affiliates one employer organisation, which is active in the rest of road transport, is considered representative and participates in collective bargaining in its domain.</p> <p>The UITP affiliates one employer organisation, which is active in the whole road transport sector, is considered representative and participates in collective bargaining in the rest of road transport.</p>
Antral (urban public transport)	3,000	3,000	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
Antram (rest of road transport)	1,647	No members	1,647	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU	
ANTP (REST OF ROAD TRANSPORT)	No data	No members	No data	Rest of road transport: no data Urban public transport: no	Rest of road transport: no data Urban public transport: no	No data	

## Representativeness of the European social partner organisations: Road transport sector


	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Carris	Bus and tram	Public – municipal enterprise	2,600	SITRA, Fectrans (STRUP and others), ASPTC, SNMOT, etc.	SGI Europe Portugal	UITP	Collective bargaining at company level
Doctrans – Primafrío-Lamision	Freight transport by road	Private	~2,000 (2015)	No data	Antram		Collective bargaining at sector level
Metropolitano de Lisboa	Underground	Public – state owned	1,516	Fectrans (STRUP and others), STTM, SITRA, Sindem, etc.	SGI Europe Portugal	UITP	Collective bargaining at company level
<b>Three largest employers in urban public transport activities</b>							
Carris	Bus and tram	Public – municipal enterprise	2,600	SITRA, Fectrans (STRUP and others), ASPTC, SNMOT, etc.	SGI Europe Portugal	UITP	Collective bargaining at company level
Metropolitano de Lisboa	Underground	Public – state owned	1,516	Fectrans (STRUP and others), STTM, SITRA, Sindem, etc.	SGI Europe Portugal	UITP	Collective bargaining at company level
Sociedade de Transportes Colectivos do Porto SA (STCP)	Bus and tram	Public – inter-municipal enterprise	1,335	SNMOT, Sttamp, SMTP, SITRA, Fectrans (STRUP and others), STRUN, etc.	None	UITP	Collective bargaining at company level



Representativeness of the European social partner organisations: Road transport sector

<b>Three largest employers in the rest of road transport</b>							
Doctrans – Primafrio-Lamision	Freight transport by road	Private	~2,000 (2015)	No data	Antram		Collective bargaining at sector level
Patinter – Portuguesa de Automóveis Transportadores, SA	Freight transport by road		~1,000 (2015)	Fectrans (STRUP)	Antram		Collective bargaining at sector level
Luís Simões – Logística Integrada, SA	Freight transport by road		~1,500 (2021)	STRUN	Antram		Collective bargaining at sector level

## Representativeness of the European social partner organisations: Road transport sector

<b>ROMANIA</b> 	Size of road transport workforce: 126,283	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: no data	Urban public transport: collective bargaining at company level
		Size of rest of road transport workforce: 126,283	Collective bargaining coverage, rest of road transport: 5%	Rest of road transport: collective bargaining at company level

2 trade unions	<p>There are two trade unions in the road transport sector in Romania. One organises members in the rest of road transport but is not considered representative and does not participate in collective bargaining processes in its domain.</p> <p>The other trade union organises members in urban public transport activities, is not considered representative and does not participate in collective bargaining processes in its domain.</p> <p>The unions are considered representative in their membership domains based on the principle of mutual recognition.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member States?	Collective bargaining in the Member States?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
SLT (rest of road transport)	1,500	No members	1,500	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: no	ETF	The ETF affiliates both of the trade unions in the country.
ATU-România (urban public transport)	17,557 (2018)	17,557	No members	Rest of road transport: no Urban public transport: no	Rest of road transport: no Urban public transport: no	ETF	

1 employer organisation	<p>There is one employer organisation in the road transport sector in Romania, which organises companies across the whole sector, is considered representative and does not participate in collective bargaining processes in the sector.</p> <p>This employer organisation is considered representative in the sector based on the legal statutory criteria.</p>
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Representativeness of the European social partner organisations: Road transport sector


	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member States?	Collective bargaining in the Member States?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
UNTRR (whole road transport)	16,000	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: no	IRU	The IRU affiliates the only employer organisation, which is active across the whole road transport sector, is considered representative and does not participate in collective bargaining.

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Societatea de Transport Bucuresti SA (STB)	Bus, light rail (tram), trolley bus	Public	10,927	Sindicatul Transportatorilor din Bucuresti (Bucharest Transport Trade Union)	No affiliation	UITP	Collective bargaining at company level
Metrorex SA	Metro	Public	5,174	Sindicatul Liber din Metrou (Free Metro Trade Union)	No affiliation		Collective bargaining at company level
Compania de Transport Public SA Iasi	Bus, light rail (tram), trolley bus	Public	1,213	No information	No information		No information

Representativeness of the European social partner organisations: Road transport sector

<b>Three largest employers in urban public transport activities</b>							
Societatea de Transport Bucuresti SA (STB)	Bus, light rail (tram), trolley bus	Public	10,927	Sindicatul Transportatorilor din Bucuresti (Bucharest Transport Trade Union)	No affiliation	UITP	Collective bargaining at company level
Metrorex SA	Metro	Public	5,174	Sindicatul Liber din Metrou (Free Metro Trade Union)	No affiliation		Collective bargaining at company level
Compania de Transport Public SA Iasi	Bus, light rail (tram), trolley bus	Public	1,213	No information	No information		No information
<b>Three largest employers in the rest of road transport</b>							
SC International Alexander SRL			1,008	No information available	No information available		
Carrion Expedition SRL			912	No information available	No information available		
Skiptrans SRL			728	Sindicatul Lucratorilor din Transporturi	No information available		

Representativeness of the European social partner organisations: Road transport sector

<b>SWEDEN</b> 	Size of road transport workforce: 180,000	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 75–95%	Urban public transport: collective bargaining at sector level
		Size of rest of road transport workforce: 180,000	Collective bargaining coverage, rest of road transport: 80–90%	Rest of road transport: collective bargaining at sector level

3 trade unions	<p>There are three trade unions in the road transport sector in Sweden, all of which organise members across the whole road transport sector; two are considered representative and all participate in collective bargaining processes in the sector. The unions are considered representative in their membership domains based on the principle of mutual recognition.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
Kommunal (whole road transport)	25,600	17,500	8,100	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	<p>The ETF organises all three trade unions in the country, two of which are considered representative and all of which participate in collective bargaining processes. No other European associations have members in the country.</p>
Transport (whole road transport)	20,615	2,004	18,611	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	
SEKO (whole road transport)	11,300	11,300	No data	Rest of road transport: no Urban public transport: no	Rest of road transport: yes Urban public transport: yes	ETF	

4 employer organisations	<p>There are four employer organisations in the road transport sector in Sweden, two of which organise companies across the whole sector, are considered representative and participate in collective bargaining processes in the sector. The sector is divided between freight and passenger services. Passenger services are divided into scheduled public transport, commercial scheduled public transport and tourist traffic by coach. All employer organisations cover the passenger sector.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative	Collective bargaining in	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State

Representativeness of the European social partner organisations: Road transport sector

				in the Member State?	the Member State?		
SBF (whole road transport)	259	249	10	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	UITP, IRU	<p>The IRU affiliates two employer organisations, both of which organise across the whole sector, are considered representative and participate in collective bargaining in the sector.</p> <p>The UITP affiliates one employer organisation, which is active in the whole road transport sector, is considered representative and participates in collective bargaining in the sector.</p> <p>CER affiliates one employer organisation in urban public transport activities, where it is considered representative and participates in collective bargaining processes.</p>
BA (whole road transport)	6,527	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	IRU	
Almega Tågföretagen (urban public transport)	70	70	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	CER	
STBF (rest of road transport)	70	No members	70	Rest of road transport: yes Urban public transport: no	Rest of road transport: yes Urban public transport: no	IRU indirectly through membership of EACT	

## Representativeness of the European social partner organisations: Road transport sector


	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Nobina AB	Passenger road transport	Private	13,554	Kommunal, Transport, Unionen, SI, Ledarna	Sveriges Bussföretag		Collective bargaining at sector level
Transdev	Rail, bus	Private	7,000	Kommunal, Transport, SEKO (blue collar), Unionen (white collar)	Almega – Tågföretagen	UITP	Collective bargaining at sector level
MTR Nordic	Rail, metro	Private	6,200 (these are all in urban public transport)	SEKO (blue collar), Unionen (white collar)	Almega – Tågföretagen	UITP	Collective bargaining at sector level
<b>Three largest employers in urban public transport activities</b>							
Transdev	Rail, bus	Private	7,000 (these are all employees in transport, but not all of their activities are in urban public transport)	Kommunal, Transport, SEKO (blue collar), Unionen (white collar)	Almega – Tågföretagen	UITP	Collective bargaining at sector level
MTR Nordic	Rail, metro	Private	6,200 (these are all in urban public transport)	SEKO (blue collar), Unionen (white collar)	Almega – Tågföretagen	UITP	Collective bargaining at sector level
Keolis	Bus	Private	4,610	Kommunal, Transport (blue collar), Unionen (white collar)	Sveriges Bussföretag	UITP	Collective bargaining at sector level

Representativeness of the European social partner organisations: Road transport sector

Three largest employers in the rest of road transport							
Nobina AB	Passenger road transport	Private	13,554 (significant overlap with urban public transport)	Kommunal, Transport, Unionen, SI, Ledarna	Sveriges Bussföretag		Collective bargaining at sector level
DHL Sweden AB	Freight transport by road	Private	5,200	Transport, Unionen, SI, Ledarna	Biltrafikens Arbetsgivareförbund		Collective bargaining at sector level
Schenker AB	Freight transport by road	Private	2,042	Transport, Unionen, SI, Ledarna	Biltrafikens Arbetsgivareförbund		Collective bargaining at sector level



Representativeness of the European social partner organisations: Road transport sector

<b>SLOVENIA</b> 	Size of road transport workforce: 31,405	Size of urban public transport workforce: no data	Collective bargaining coverage, urban public transport: 100% (except taxis)	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: 31,405	Collective bargaining coverage, rest of road transport: 100%	Rest of road transport: collective bargaining at sector level

3 trade unions	There are three trade unions in the road transport sector in Slovenia, all of which organise members across the whole road transport sector, are considered representative and participate in collective bargaining processes in the sector. The unions are considered representative in their membership domains based on the legal statutory criteria.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
ZSSS-SDPZ (whole road transport)	900	Data for both sectors		Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF organises one trade union in the country, which is considered representative and participates in collective bargaining processes. No other European associations have members in the country.
SV LPP (whole road transport)	56	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	
KS-90 – SVAS (whole road transport)	1,000	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	

3 employer organisations	There are three employer organisations in the road transport sector in Slovenia, all of which organise companies in the whole of road transport sector, are considered representative and participate in collective bargaining processes in the sector. The employer organisations are considered representative in the sector based on the legal statutory criteria.
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## Representativeness of the European social partner organisations: Road transport sector


	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
GZS-ZPZ (whole road transport)	445	35	410	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	No European associations have members in the country.
OZS (whole road transport)	3,420	1,000	2,420	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	
ZDS (whole road transport)	10	No data	No data	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	No affiliation	

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Slovenske železnice (Slovenian Railways)	Urban and suburban passenger land transport systems	Public	6,752 (2021)	Sindikata železniškega prometa Slovenije (Slovenian Rail Transport Union, SŽPS)	ZDS, GZS-ZPZ		Collective bargaining at sector and company levels
Nomago doo	Passenger road transport		1,091	Union of Transportation and Telecommunication Workers – SDPZ (trade union of Nomago)	GZS-ZPZ, ZDS (transport and communications section)		Collective bargaining at sector and company levels

## Representativeness of the European social partner organisations: Road transport sector

JAVNO Podjetje Ljubljanski Potniški Promet doo	Urban and suburban passenger land transport systems	Public	846	Sindikatale voznikov LPP (LPP Drivers' Trade Union)	GZS-ZPZ	UITP	Collective bargaining at sector and company levels
<b>Three largest employers in urban public transport activities</b>							
Slovenske železnice (Slovenian Railways)	Urban and suburban passenger land transport systems	Public	6,752	SŽPS	ZDS, GZS-ZPZ		Collective bargaining at sector and company levels
JAVNO Podjetje Ljubljanski Potniški Promet doo	Urban and suburban passenger land transport systems	Public	846	Sindikatale voznikov LPP (LPP Drivers' Trade Union)	GZS-ZPZ	UITP	Collective bargaining at sector and company levels
Marprom doo	Urban and suburban passenger land transport systems	Public	297	Sindikatale Marprom Maribor (Trade Union Marprom Maribor)	GZS-ZPZ, ZDS		Collective bargaining at sector and company levels
<b>Three largest employers in the rest of road transport</b>							
Nomago doo	Passenger road transport		1,091	Union of Transportation and Telecommunication Workers – SDPZ (trade union of Nomago)	GZS-ZPZ, ZDS (transport and communications section)		Collective bargaining at sector and company levels
Arriva doo	Passenger road transport		638	Union of Transportation and Telecommunication Workers – trade union of SDPZ of Arriva group	GZS-ZPZ, ZDS (transport and communications section)	UITP	Collective bargaining at sector and company levels
Piškur Klemen, sp Klemen transport	Freight transport by road		423		Chamber of Craft and Small Business of Slovenia – Transport Section (OZS)		Collective bargaining at sector and company levels

Representativeness of the European social partner organisations: Road transport sector

<b>SLOVAKIA</b> 	Size of road transport workforce: 64,841	Size of urban public transport workforce: around 10,000	Collective bargaining coverage, urban public transport: 100%	Urban public transport: collective bargaining at sector and company levels
		Size of rest of road transport workforce: 54,841	Collective bargaining coverage, rest of road transport: no data	Rest of road transport: collective bargaining at sector and company levels

2 trade unions	<p>There are two trade unions in the road transport sector in Slovakia, one of which organises members across the whole road transport sector, is considered representative and participates in collective bargaining processes in the sector. The second trade union organises members in urban public transport activities. One trade union is considered representative based on the legal requirements. The second is considered representative in its membership domains based on the principle of mutual recognition.</p>						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
OZ KOVO (whole road transport)	4,500	4,000	500	Rest of road transport: yes Urban public transport: yes	Rest of road transport: yes Urban public transport: yes	ETF	The ETF organises one trade union in the country, which is considered representative and participates in collective bargaining processes.
IOZ (urban public transport)	3,800	3,800	No members	Rest of road transport: no Urban public transport: yes	Rest of road transport: no Urban public transport: yes	No affiliation	No other European associations have members in the country.

Representativeness of the European social partner organisations: Road transport sector

3 employer organisations	There are three employer organisations in the road transport sector in Slovakia, two of which organise companies in urban public transport activities. The other employer organisation organises companies in the rest of road transport. The employer organisations are considered representative in the sector based on the principle of mutual recognition.						
	Members in the whole road transport sector	Members in urban public transport	Members in the rest of road transport	Considered representative in the Member State?	Collective bargaining in the Member State?	European sectoral affiliation	Assessment of the representativeness of the EU social partners in this Member State
UDPaT (urban public transport)	1	1	No members	Rest of road transport: no Urban public transport: no data	Rest of road transport: no Urban public transport: no data	No affiliation	The IRU affiliates one employer organisation in the country. No other European associations have members in the country.
ZAD (urban public transport)	16	16	No members	Rest of road transport: no Urban public transport: no data	Rest of road transport: no Urban public transport: yes	No affiliation	
Česmad (rest of road transport)	No data	No members	No data	Rest of road transport: no data Urban public transport: no	Rest of road transport: no data Urban public transport: no	IRU	

## Representativeness of the European social partner organisations: Road transport sector

	Type of sector activities covered	Type of organisation (public/private/other)	Estimate of number of road transport employees (% of entire road transport sector)	Trade union(s) organising the employees in this company	Employer organisation(s) with which this employer is affiliated at national level	Direct affiliation at European level?	What kind of collective bargaining is applicable to this employer?
<b>Three largest employers in the whole road transport sector</b>							
Transportation company Bratislava (DPB)	Bus, trolley bus, tram	100% joint-stock company of the municipality	2,779	Base organisation of IOZ at DPB electric lines, technical infrastructure and bus divisions, Bratislava Trade Union of Urban Public Transportation Drivers	UDPaT		Collective bargaining at company level
Arriva (and its subsidiaries)	Bus	Private joint-stock company	2,500	OZ KOVO	ZAD	UITP	Collective bargaining at company and sector levels
Transportation company of the City of Košice (DPMK)	Bus, tram	100% joint-stock company of the municipality	990	Base organisation of IOZ at DPMK and base organisation of urban public transportation drivers at DPMK	No		Collective bargaining at company level

## Representativeness of the European social partner organisations: Road transport sector

Three largest employers in urban public transport activities							
Transportation company Bratislava (DPB)	Bus, trolley bus, tram	100% joint-stock company of the municipality	2,779	Base organisation of IOZ at DPB electric lines, technical infrastructure and bus divisions, Bratislava Trade Union of Urban Public Transportation Drivers	UDPaT		Collective bargaining at company level
Arriva (and its subsidiaries)	Bus	Private joint-stock company	2,500	OZ KOVO	ZAD	UITP	Collective bargaining at company and sector levels
Transportation company of the City of Košice (DPMK)	Bus, tram	100% joint-stock company of the municipality	990	Base organisation of IOZ at DPMK and base organisation of urban public transportation drivers at DPMK			Collective bargaining at company level
Three largest employers in the rest of road transport							
Slovenská autobusová doprava Zvolen, akciová spoločnosť	Passenger road transport		~900	OZ KOVO, company-level trade union	ZAD		Collective bargaining at company and sector levels
STD Donivo AS	Freight transport by road		~900	No data	No data		No data
Probably Duvenbeck Slovensko sro	Freight transport by road		~606	No data	No data		No data

## Annex 2: List of all trade unions included in the study

Member State	Full name in the original language	Abbreviation	Full name in English
AT	vida	vida	vida
AT	younion – Die Daseinsgewerkschaft	younion	younion
AT	Gewerkschaft der Post- und Fernmeldebediensteten	GPF	Union of Postal and Telecommunications Employees
AT	Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier	GPA	Union of Salaried Employees, Journalists and Graphical Workers
BE	ACV Openbare Diensten/CSC Services Publics	ACV-CSC Public Services	ACV-CSC Public Services
BE	ABVV-FGTB Belgische Transportarbeidersbond	ABVV-FGTB BTB-UBT	Belgian Transport Workers Union
BE	ABVV-FGTB Algemene Centrale der Openbare Diensten	ABVV-FGTB ACOD-CGSP	ABVV-FGTB General Federation for Public Services
BE	ACV-CSC Transcom	ACV-CSC Transcom	ACV-CSC Transcom
BE	Algemene Centrale der Liberale Vakbonden van België	ACLVB-CGSLB	General Federation of Liberal Trade Unions of Belgium
BE	ACV Openbare Diensten/CSC Services Publics	ACV-CSC Puls	ACV-CSC Puls
BE	Bond van Bedienden, Technici en Kaderleden / Syndicat des Employés, Techniciens et Cadres	ABVV-FGTB BBTk-SETCa	Union of White Collar Workers, Technicians and Staff
BG	Съюз на транспортните синдикати в България	CTCB (FTTU)	Federation of Transport Trade Unions in Bulgaria
BG	Федерация на транспортните работници 'Подкрепа'	ФТР 'Подкрепа' (FTW Podkrepa)	Federation of Transport Workers – Podkrepa
BG	Синдикат на железничарите в България	СЖБ (SJB)	Union of Railway Workers in Bulgaria
CY	Συντεχνία Εργατοϋπαλλήλων Γεωργίας, Δασών, Μεταφορών, Λιμενεργατών, Ναυτεργατών και Συναφών Επαγγελματιών Κύπρου – Παγκύπρια Εργατική Ομοσπονδία	ΣΕΓΔΑΜΕΛΙΝ – ΠΕΟ (Segdamelin – PEO)	Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union – Pancyprian Federation of Labour
CY	Ομοσπονδία Εργατοϋπαλλήλων Μεταφορών, Πετρελαιοειδών και Γεωργίας – Συνομοσπονδία Εργαζομένων Κύπρου	ΟΜΕΠΕΓΕ – ΣΕΚ (FTPAW – SEK)	Federation of Transport, Petroleum and Agriculture Workers – Cyprus Workers Confederation
CZ	Odborový svaz pracovníků dopravy, silničního hospodářství a autoopravenství Čech a Moravy	OS DOSIA	Trade Union of Transport, Road and Car Repair Services Workers of Bohemia and Moravia
CZ	Odborový svaz dopravy	OSD	Trade Union of Transport
DE	Vereinigte Dienstleistungsgewerkschaft	Ver.di	United Services Union
DE	Eisenbahn- und Verkehrsgewerkschaft	EVG	Railway and Transport Union
DE	Nahverkehrsgewerkschaft	NahVG	Public Transport Union
DK	Fagligt Fælles Forbund	3F	The Federation of Danish Workers
DK	Dansk Jernbaneforbund	DJF	Danish Railway Workers' Union
DK	HK Privat	HK Privat	HK Private (former Union of Clerical and Commercial Employees/Private)



Representativeness of the European social partner organisations: Road transport sector

Member State	Full name in the original language	Abbreviation	Full name in English
EE	Eesti Transpordi- ja Teetöötajate Ametiühing	ETTA	Estonian Transport and Road Workers' Trade Union
EL	Πανελλήνια Ομοσπονδία Σιδηροδρομικών & Μέσων Σταθερής Τροχιάς	ΠΟΣ-ΜΣΤ (POS-MET)	Panhellenic Railwaymen Federation
EL	Συνδικάτο Εργαζομένων και Θυγατρικών Εταιρειών ΟΑΣΑ	No abbreviation	Union of Employees and Subsidiary Companies of OASA
EL	Συνδικάτο Εργαζομένων Οργανισμού Αστικής Συγκοινωνίας Θεσσαλονίκης	ΣΕΟΑΣΘ (Seoasth)	Union of Thessaloniki Urban Transport Organisation Employees
EL	Σωματείο Εργαζομένων ΟΑΣΑ	No abbreviation	Union of OASA Employees
EL	Σωματείο Εργαζομένων Λειτουργίας Μετρό Αθηνών	ΣΕΛΜΑ (SELMA)	Union of Athens Metro Employees
EL	Σωματείο Εργαζομένων ΣΤΑΣΥ	No abbreviation	Union of STASY Employees (former Union of HSAP Employees)
EL	Σύλλογος Εργαζομένων Τραμ	ΣΕΤ (SET)	Union of Tram Employees
EL	Ομοσπονδία Υπαλλήλων Οδηγών Αυτοκινήτων Ελλάδας	ΟΣΜΕ (OSME)	Greek Federation of Transport Syndicates
ES	Federación de Servicios a la Ciudadanía de CCOO	FSC-CCOO	Federation of Citizenship Services of Workers' Commissions
ES	Unión General de Trabajadores – Federación de Servicios, Movilidad y Consumo	UGT-FeSMC	General Union of Workers – Federation of Services, Mobility and Consumption
ES	Sindicato Independiente de Transportes de Barcelona	SIT	Independent Transport Union of Barcelona
ES	Sindicato Libre del Transporte	SLT	Free Transport Union
ES	Coalición Independiente de Trabajadores de Madrid – Unión Profesional	CSIT-UP	Independent Coalition of Workers of Madrid – Professional Union
ES	Euso Langileen Alkaratsuna-Solidaridad de los Trabajadores Vascos	ELA	Solidarity of Basque Countries
ES	Langile Abertzaleen Batzordeak	LAB	National Workers Commissions
ES	Unión Sindical Obrera	USO	Labour Trade Union
ES	Confederación Intersindical Gallega	CIG	Galician Inter-union Confederation
ES	Colectivo Unitario de Trabajadores de Aragón	CUT-Aragón	Unitary Collective of Workers of Aragon
ES	Central Sindical Independiente y de Funcionarios	CSIF	Independent and Civil Servants' Trade Union Centre
ES	Plataforma Sindical de la EMT	Plataforma Sindical – EMT	Union Platform of the EMT
ES	Sindicato del Colectivo de Maquinistas de Metro	SCMM	Metro Train Drivers Collective Union
ES	Sindicato Unitario – Metro	SU Metro	Unitary Union – Metro
ES	Solidaridad Obrera – Sección Metro de Madrid	SO Metro	Worker Solidarity – Madrid Metro Section
FI	Auto- ja kuljetusalan Työntekijäliitto ry	AKT	Finnish Transport Workers' Union
FI	Julkisten ja hyvinvointialojen liitto	JHL	Trade Union for the Public and Welfare Sectors
FI	Erityisalojen Toimihenkilöliitto ry	ERTO	ERTO Federation of Salaried Employees in Specialised Sectors

Representativeness of the European social partner organisations: Road transport sector

Member State	Full name in the original language	Abbreviation	Full name in English
FI	Rautatiealan unioni	RAU	Union of Locomotive Drivers
FI	PAM	PAM	PAM
FR	Fédération Générale Transports CFTC	CFTC Transports	General Transport Federation CFTC
FR	Fédération Générale Transports et Environnement CFDT	FGTE CFDT	CFDT Transport and Environment
FR	Fédération nationale des syndicats de transports CGT	FNST CGT	National Federation of Transport Unions CGT
FR	Fédération des transports et de la Logistique FO-UNCP	FNTL FO-UNCP	Transport and Logistics Federation FO-UNCP
FR	Fédération Nationale CFE-CGC Transports	CFE-CGC Transports	National Federation CFE-CGC Transport
FR	UNSA Transports	UNSA Transports	UNSA Transport
FR	Union solidaire transport	UST Transports	Transport Solidarity Union
HR	Sindikata Zagrebačkog holdinga – ZET	SZH-ZET	Trade Union of Zagreb Holding – ZET
HR	Sindikata vozača i prometnih radnika – ZET Zagreb	SVPRZZ	Trade Union of Drivers and Transport Workers – ZET Zagreb
HR	Sindikata hrvatskih vozača	SHV	Trade Union of Croatian Drivers
HR	Sindikata prometa i veza Hrvatske	SPIVH	Trade Union of Traffic and Communications of Croatia
HR	Udruga sindikata vozača i prometnog osoblja Hrvatske	USVPRH	Association of Croatian Drivers and Transport Staff Unions
HU	Közösségi Közlekedési Szakszervezet – az Egységes Közlekedési Szakszervezet	EKSZ	Community Transport Union – United Transport Union
HU	Metró Közlekedési Dolgozók Szakszervezete	Metró KDSZ	Metro Transport Workers' Union
HU	Közlekedési Szakszervezetek Országos Szövetsége	KSZOSZ	National Federation of Transport Trade Unions
HU	Teherfuvarozók Európai Szakszervezete	TESZ	Trade Union of European Road Transporters
HU	Közúti Közlekedési Szakszervezet	KKSZ	Road Transport Union
IE	National Bus and Rail Union	NBRU	National Bus and Rail Union
IE	Transport Salaried Staffs' Association	TSSA	Transport Salaried Staffs' Association
IE	Services, Industrial, Professional and Technical Union	SIPTU	Services, Industrial, Professional and Technical Union
IE	Connect	Connect	Connect
IT	Federazione Italiana Lavoratori Trasporti	FILT-CGIL	Italian Federation of Transport Workers of Italian General Confederation of Labour
IT	Federazione Italiana Trasporti in Confederazione Italiana Sindacati Lavoratori	FIT-CISL	Italian Federation of Transport of Italian Confederation of Workers' Unions
IT	Unione Italiana Lavoro Trasporti	UILTrasporti	Italian Labour Union Transport
LT	Transporto darbuotojų federacija	TDF	Transport Workers' Federation
LT	Lietuvos kelių ir autotransporto darbuotojų profesinių sąjungų federacija	LKADPSF	Federation of Lithuanian Road and Transport Workers Trade Unions
LT	Baltijos transporto profesinė sąjunga 'Solidarumas'	BTPS 'Solidarumas'	Trade Union 'Solidarumas' of Baltic Transport
LT	Lietuvos vežėjų profesinė sąjunga	LVPS	Lithuanian Carrier's Trade Union

Representativeness of the European social partner organisations: Road transport sector

Member State	Full name in the original language	Abbreviation	Full name in English
LU	Syprolux	Syprolux	Syprolux
LU	Syndicat Transport sur Route et Navigation de l'OGB-L	No abbreviation	OGB-L Road Transport and Navigation Trade Union
LU	LCGB-Transport	LCGB-Transport	LCGB-Transport
LV	Latvijas Sabiedrisko pakalpojumu un transporta darbinieku arodbiedrība LAKRS	LAKRS	Latvian Trade Union of Public Service and Transport Workers LAKRS
MT	General Workers Union	GWU	General Workers Union
MT	UHM Voice of the Workers	UHM	UHM Voice of the Workers
NL	Federatie Nederlandse Vakbeweging	FNV	Netherlands Trade Union Confederation
NL	Christelijk Nationaal Vakverbond	CNV	Christian National Trade Union Federation
NL	De Unie	De Unie	De Unie
PL	Krajowa Sekcja Komunikacji Miejskiej Niezależnego Samorządnego Związku Zawodowego 'Solidarność'	KS KM NSZZ 'Solidarność'	National Section of Urban Public Transport in Independent Self-governing Trade Union 'Solidarity'
PL	Ogólnopolski Pracowniczy Związek Zawodowy	OPZZ	All-Poland Alliance of Trade Unions
PL	Związek Zawodowy Pracowników Komunikacji Miejskiej w RP	ZZPKMwRP	Urban Transportation Workers Trade Union in Republic of Poland
PL	Krajowa Sekcja Transportu Drogowego NSZZ „Solidarność”	KSTD NSZZ 'Solidarność'	National Road Transport Section NSZZ 'Solidarność'
PT	Federação dos Sindicatos de Transportes e Comunicações	Fectrans	Federation of Transport and Communications Unions
PT	Sindicato dos Trabalhadores dos Transportes	SITRA	Transport Workers' Union
PT	Sindicato Nacional dos Motoristas e Outros Trabalhadores	SNMOT	National Union of Drivers and Other Workers
PT	Sindicato Nacional dos Maquinistas dos Caminhos de Ferro Portugueses	SMAQ	National Union of Train Drivers of Portuguese Railways
PT	Associação Sindical dos Trabalhadores da Carris	ASPTC	Carris Workers' Union Association
PT	Sindicato dos Trabalhadores de Transportes Rodoviários e Urbanos do Norte	STRUN	Road and Urban Transport Workers Union of the North
PT	Sindicato dos Trabalhadores dos Transportes de Portugal	Sttamp	Transport Workers Union of Portugal
PT	Sindicato dos Trabalhadores da Tracção do Metropolitano	STTM	Metropolitan Traction Workers' Union
PT	Associação Sindical de Trabalhadores dos Transportes Colectivos do Porto	SMTP	Collective Transport Workers' Union of Porto
PT	Sindicato Independente dos Motoristas de Mercadorias	SIMM	Independent Freight Drivers' Union
PT	Sindicato Independente de Motoristas de Matérias Perigosas	Simpper	Independent Union of Drivers of Dangerous Goods
RO	Federația Sindicatelor din Transporturi Transloc și Servicii Publice 'ATU-România'	ATU-România	'ATU-România' Federation of Transport and Public Services Trade Unions
RO	Sindicatul Lucratorilor din Transporturi	SLT	Transport Workers Trade Union

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Representativeness of the European social partner organisations: Road transport sector

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<b>Member State</b>	<b>Full name in the original language</b>	<b>Abbreviation</b>	<b>Full name in English</b>
SE	Svenska Kommunalarbetareförbundet	Kommunal	Swedish Municipal Workers' Union
SE	Svenska Transportarbetareförbundet	Transport	Swedish Transport Workers Union
SE	Service- och kommunikationsfacket	SEKO	Swedish Service and Communications Union
SI	Zveza svobodnih sindikatov Slovenije – Sindikat delavcev prometa in zvez	ZSSS-SDPZ	Association of Free Trade Unions of Slovenia – Union of Transportation and Telecommunication Workers
SI	Sindikat voznikov LPP	SV LPP	LPP Drivers' Trade Union
SI	KS-90 – Sindikat voznikov avtobusov Slovenije	KS-90 – SVAS	KS-90 – Slovenian Bus Drivers' Union
SK	Odborový zväz KOVO	OZ KOVO	Trade Union KOVO
SK	Integrovaný odborový zväz	IOZ	Integrated Trade Union

### Annex 3: List of all employer organisations/business associations included in the study

Member State	Full name in the original language	Abbreviation	Full name in English
AT	Fachverband der Autobus-, Luftfahrt- und Schifffahrtunternehmungen	FVALS	Federal Association of Bus, Civil Aviation and Shipping Companies
AT	Fachverband für das Güterbeförderungsgewerbe	FVGB	Federal Association of the Freight Operation Trades
AT	Fachverband Seilbahnen	FVS	Federal Association of Cableway Operators
AT	Fachverband der Schienenbahnen	FVSB	Federal Association of Rail Transport
AT	Fachverband	FVBG	Federal Association of Transport with Passenger Cars
BE	Federatie van Belgische Autobus en Autocar-ondernemers	FBAA	Federation of Belgian Bus and Autocar Entrepreneurs
BE	Belgische Kamer der Verhuizers	BKV-CBD	Belgian Chamber of Movers
BE	De federatie van Belgische transporteurs en logistieke dienstverleners	Febetra	The Federation of Belgian Transporters and Logistics Service Providers
BE	Transport en Logistiek Vlaanderen	TLV	Transport and Logistics Flanders
BE	Unie van Professionele Transporteurs en Logistieke Ondernemers/Federation Royale Belge des Transporteurs et des Prestataires de services logistiques	UPTR	Union of Professional Hauliers and Logistics Operators
BE	Werkgeversfederatie voor de internationale handel, het vervoer en logistiek	WF-FE	Employers' Federation for International Trade, Transport and Logistics
BE	Belgische Vereniging Voor Gemeenschappelijk Stads- en Streekvervoer	BVGSSV	Belgian Federation for the Communal Urban and Regional Transport
BE	Nationale Groepering Van Ondernemingen met Taxi- en Locatievoertuigen met Chauffeurs	GTL TAXI	National Grouping of Enterprises with Taxi- and Location Vehicles with Drivers
BG	Асоциация на българските предприятия за международни превози и пътищата	АЕБТРИ (Aebtri)	Association of the Bulgarian Enterprises for International Transport and the Roads
BG	Камара на автомобилните превозвачи в България	КАПБ (CBRH)	Chamber of the Bulgarian Road Hauliers
CZ	Svaz dopravy ČR	SD ČR	Transport Union of the Czech Republic
CZ	Sdružení automobilových dopravců Česmad Bohemia, z.s.	Česmad Bohemia	Association of Car Carriers
DE	Bundesverband Deutscher Omnibusunternehmen	BDO	Federal Association of German Bus Companies
DE	Bundesverband Spedition and Logistik	DSLVL	Federal Association for Freight Forwarding and Logistics Germany

Representativeness of the European social partner organisations: Road transport sector

Member State	Full name in the original language	Abbreviation	Full name in English
DE	Bundesverband Güterkraftverkehr Logistik und Entsorgung	BGL	Federal Road Haulage Association Logistics and Waste Management
DE	Vereinigung der kommunalen Arbeitgeberverbände	VKA	Association of Municipal Employers' Associations
DE	Arbeitgeberverband Nahverkehr	AVN	Employer Organisation for Urban Public Transport
DE	Bundesverband Taxi und Mietwagen	BVTM	Federal Association of Taxis and Rented Cars
DE	Verband Deutscher Verkehrsunternehmen	VDV	Association of German Transport Companies
DK	Dansk Person Transport	DPT	Danish Passenger Transport
DK	Dansk Industri	DI	Confederation of Danish Industry
DK	Dansk Erhverv	DE	Danish Chamber of Commerce
DK	International Transport Danmark	ITD	International Transport Denmark
DK	Dansk Transport- og Logistikorganisation	DTL	Danish Transport and Logistics Organisation
DK	KL	KL	Local Government Denmark
EE	Autoettevõtete Liit	AEL	Union of Estonian Automobile Enterprises
EE	Eesti Rahvusvaheliste Autovedajate Assotsiatsioon	ERAA	Association of Estonian International Road Carriers
EL	Ομοσπονδία Φορτηγών Αυτοκινητιστών Ελλάδας Οδικών Εμπορευματικών και Επιβατικών Μεταφορών	ΟΦΑΕ (OFAE)	Hellenic Federation of Road Transports
EL	Πανελλήνια Ομοσπονδία Επαγγελματιών Ιδιοκτητών Αυτοκινητιστών Ταξί και Αγοραίων	Ποειατα	Panhellenic Federation of Professional Taxi Owners
ES	Confederación Española de Transporte en Autobús	Confebus	Spanish Confederation of Bus Transport
ES	Asociación Nacional de Empresarios de Transportes en Autocares	Anetra	National Coach Transport Association
ES	Asociación del Transporte Internacional por Carretera	ASTIC	Association of International Road Transport
ES	Confederación Española de Transporte de Mercancías	CETM	Spanish Confederation of Freight Transport
ES	Federación Nacional de Asociaciones de España	Fenadismer	National Federation of Transport Associations of Spain
ES	Asociación de Transporte Público Urbano y Metropolitano	ATUC	Association of Urban and Metropolitan Public Transport
ES	Asociación Nacional del Taxi	Antaxi	National Taxi Association
FI	Autoliikenteen Työnantajaliitto ry	ALT	Employers' Federation of Road Transport
FI	Palvelualojen työnantajat ry	PALTA	Service Sector Employers
FI	Linja-autoliitto	LAL	The Finnish Bus and Coach Association
FI	Suomen Kuljetus ja Logistiikka ry	SKAL	Finnish Transport and Logistics
FI	Taksiliikenteen Työnantajat ry	Taksiliikenteen Työnantajat ry	Taxi Sector's Employers

Representativeness of the European social partner organisations: Road transport sector

Member State	Full name in the original language	Abbreviation	Full name in English
FI	Kunta- ja hyvinvointialueyöntäjät ry	KT	Local Government and County Employers
FR	Fédération nationale des transports routiers	FNTR	National Road Transport Federation
FR	Union des Entreprises de Transport et de Logistique de France	Union TLF	French Union of Transport and Logistics Companies
FR	Organisation des Transporteurs Routiers Européens	OTRE	Organisation of European Road Hauliers
FR	Fédération nationale des transports de voyageurs	FNTV	National Federation of Passenger Transport
FR	Association Française du Transport Routier International	AFTRI	French Road Haulage Association for International Transport
FR	Union des Transports publics et ferroviaires	UTP	Union of Public and Rail Transport
FR	Union Nationale des Industries du Taxi	UNIT	National Union of Taxi Industries
FR	Chambre Syndicale Nationale des Entreprises de Remise et de Tourisme	CSNERT	National Chamber of Delivery and Touring Car Companies
FR	Fédération Nationale des Taxis Indépendants	FNTI	National Federation of Independent Taxis
FR	Fédération Nationale des Artisans du Taxi	FNAT	National Federation of Taxi Professionals
FR	Fédération Nationale du Taxi	FNDT	National Taxi Federation
FR	Union Nationale des Taxis	UNT	National Taxi Union
HR	HUP-Udruga prometa	HUP-UP	Croatian Employer's Association – Transport Association
HR	Hravtska Gospodarska Komora	HGK	Croatian Chamber of Commerce
HU	Magyar Közúti Fuvarozók Egyesülete	MKFE	Hungarian Road Transporter Association
HU	Magánvállalkozók Nemzeti Fuvarozó Ipartestülete N.i.T.	N.i.T.	Federation of National Private Transporters
HU	Fuvarozó Vállalkozók Országos Szövetsége	Fuvosz	National Association of Transporter Contractors
HU	Országos Taxis Szövetség	OTSZ	National Taxi Association
IE	Irish Road Haulage Association	IRHA	Irish Road Haulage Association
IE	Freight Transport Association Ireland	FTAI	Freight Transport Association Ireland
IT	Associazione Nazionale Autotrasporto Viaggiatori	ANAV	National Road Passenger Transport Association
IT	Federazione Italiana Autotrasportatori Professionali	Fiapautotransporti	Italian Federation of Professional Hauliers
IT	Confederazione Generale Italiana dei Trasporti e della Logistica	Confetra	Italian General Confederation of Transport and Logistics
IT	Associazione Nazionale Imprese Trasporti Automobilistici	ANITA	National Association of Automobile Transport Companies
IT	Associazione Trasporti	Asstra	Transport Association
IT	Agenzia Confederale dei Trasporti e Servizi	AGENS	Confederal Agency of Transport and Services

Representativeness of the European social partner organisations: Road transport sector

Member State	Full name in the original language	Abbreviation	Full name in English
LT	Lietuvos nacionalinė vežėjų automobiliais asociacija	Linava	Lithuanian National Road Carriers' Association
LT	Lietuvos keleivių vežimo asociacija	LKVA	Lithuanian Passenger Transport Association
LT	Tarptautinio transporto ir logistikos aljansas	TTLA	International Transport and Logistics Alliance
LU	Groupement des Entrepreneurs de Transports	GT	Association of Transport Operators
LU	Fédération luxembourgeoise des exploitants d'autobus et d'autocars	FLEAA	Luxembourg Federation of Bus and Coach Operators
LU	Fédération des Taxis, Voitures de Location et Ambulances	No abbreviation	Federation of Taxis, Cars and Ambulances
LV	Latvijas Pasažieru pārvadātāju asociācija	LPPA	Latvian Passenger Carriers Association
LV	Autopārvadātāju asociācija 'Latvijas auto'	Latvijas auto	Association 'Latvijas auto'
MT	Malta Employers Association	MEA	Malta Employers Association
MT	Association of Tractor and Trailer Operators	ATTO	Association of Tractor and Trailer Operators
MT	Malta Chamber of Small and Medium-sized Enterprises	Malta Chamber of SMEs	Malta Chamber of Small and Medium-sized Enterprises
NL	Koninklijk Nederlands Vervoer	KNV	Royal Dutch Transport
NL	Transport & Logistiek Nederland	TLN	Transport and Logistics Netherlands
NL	Evofenedex	Evofenedex	Evofenedex
NL	Vereniging Verticaal Transport	VVT	Vertical Transport Association
NL	Vereniging Werkgevers Openbaar Vervoer	VWOV	Association of Public Transport Employers
NL	Vereniging Stedelijke Vervoerbedrijven	VSV	Association of Urban Transport Companies
PL	Pracodawcy Rzeczypospolitej Polskiej	Pracodawcy RP	Employers of Poland
PL	Forum Organizatorów Transportu	FOT	Public Transport Organisers Forum
PL	Izba Gospodarcza Komunikacji Miejskiej	IGMK	Chamber of Commerce of Public Transport
PL	Zrzeszenie Międzynarodowych Przewoźników Drogowych w Polsce	ZMPD	Association of International Road Carriers in Poland
PT	Associação Nacional de Transportes de Passageiros	Antrop	National Association of Passenger Transport
PT	Associação Nacional de Transportadores Públicos Rodoviários de Mercadorias	Antram	National Association of Public Road Freight Transport
PT	Associação Nacional das Transportadoras Portuguesas	ANTP	National Association of Portuguese Carriers
PT	Associação Nacional dos Transportadores Rodoviários em Automóveis Ligeiros	Antral	National Association of Road Transporters in Light Motor Vehicles
RO	Uniunea Națională a Transportatorilor Rutieri din România	UNTRR	National Union of Road Hauliers from Romania



Member State	Full name in the original language	Abbreviation	Full name in English
SE	Sveriges Bussföretag	SBF	Swedish Bus and Coach Federation
SE	Biltrafikens Arbetsgivareförbund	BA	Swedish Transport Employers' Association
SE	Svenska Turistbussföretag	STBF	Swedish Tourist Bus Association
SE	Almega Tågföretagen	Almega Tågföretagen	Swedish National Coach Association
SE	Svensk KollektivTrafik	SK	Swedish Transport Association
SI	Gospodarska zbornica Slovenije – Združenje za promet	GZS-ZPZ	Chamber of Commerce and Industry of Slovenia – Transport Association
SI	Obrtno-podjetniška zbornica Slovenije – Sekcija za promet	OZS	Chamber of Craft and Small Business of Slovenia – Transport Section
SI	Združenje delodajalcev Slovenije – Sekcija za promet in zveze	ZDS	Slovenian Employers' Association – Section for Transport and Communications
SI	GIZ Intertransport	GIZ Intertransport	GIZ Intertransport
SK	Česmad Slovakia – Združenie cestných dopravcov Slovenskej republiky	Česmad	Česmad Slovakia – Association of Road Transport Operators in the Slovak Republic
SK	Únia dopravy, pôšt a telekomunikácií	UDPaT	Union of Transportation, Posts and Telecommunications
SK	Zväz autobusovej dopravy	ZAD	Association of Bus Transportation

## Annex 4: Position of sector-related trade unions in the industrial relations landscape in the Member States

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
<b>Total</b>		<b>54</b>	<b>47</b>	<b>13</b>	<b>104</b>	<b>69</b>	<b>103</b>	<b>109</b>	<b>39</b>	<b>56</b>	<b>4</b>
AT	vida (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	
AT	GPF (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
AT	GPA (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes		Yes	
AT	younion (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
BE	ACLVB-CGSLB	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
BE	ABVV-FGTB BTB-UBT	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
BE	ACV-CSC Transcom	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
BE	ACV-CSC Public Services		Yes		Yes	Yes	Yes	Yes		Yes	
BE	ABVV-FGTB ACOD-CGSP (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
BE	ABVV-FGTB BBTK-SETCa (rest of road transport)			Yes	Yes	Yes	Yes	Yes			
BE	ACV-CSC Puls (rest of road transport)			Yes	Yes	Yes	Yes	Yes		Yes	
BG	FTTU (whole road transport)	Yes	Yes	Yes			Yes	Yes		Yes	
BG	FTW Podkrepa (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
BG	SJB (urban public transport)		Yes		Yes	Yes	Yes	Yes			
CY	Segdamelin – PEO (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes		
CY	FTPAAW – SEK (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes			
CZ	OS DOSIA (whole road transport)	Yes	Yes	Yes	Yes			Yes	Yes		
CZ	OSD (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
DE	Ver.di (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	
DE	EVG (urban public transport)		Yes		Yes		Yes	Yes	Yes	Yes	
DE	NahVG (urban public transport)		Yes		Yes		Yes	Yes	Yes		CESI indirectly
DK	3F (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
DK	DJF (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
DK	HK Privat (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
EE	ETTA (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
EL	OSME (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
EL	POS-MET (urban public transport)		Yes		Yes		Yes	Yes			

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
EL	Union of Employees and Subsidiary Companies of OASA (urban public transport)		Yes		Yes		Yes	Yes			
EL	Seoasth (urban public transport)		Yes		Yes		Yes	Yes			
EL	Union of OASA Employees (urban public transport)		Yes		Yes		Yes	Yes			
EL	SELMA (urban public transport)		Yes		Yes		Yes	Yes			
EL	Union of STASY Employees (urban public transport)		Yes		Yes		Yes	Yes			
EL	SET (urban public transport)		Yes		Yes		Yes	Yes			
ES	FSC-CCOO (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
ES	UGT-FeSMC (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes		
ES	CIG (whole road transport)	Yes	Yes	Yes			Yes	Yes			
ES	CSIT-UP		Yes		Yes	Yes		Yes			
ES	SIT (urban public transport)		Yes		Yes	Yes		Yes			
ES	SLT (urban public transport)		Yes		Yes	Yes		Yes			
ES	ELA (urban public transport)		Yes		Yes	Yes	Yes	Yes			
ES	LAB (urban public transport)		Yes		Yes	Yes	Yes	Yes			
ES	USO (urban public transport)		Yes		Yes	Yes	Yes	Yes			
ES	CUT-Aragón (urban public transport)		Yes		Yes	Yes	Yes	Yes			
ES	CSIF (urban public transport)		Yes		Yes	Yes	Yes	Yes			

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
ES	Plataforma Sindical – EMT (urban public transport)		Yes				Yes	Yes			
ES	SCMM (urban public transport)		Yes				Yes	Yes			
ES	SU Metro (urban public transport)		Yes				Yes	Yes			
ES	SO Metro (urban public transport)		Yes				Yes	Yes			
FI	AKT (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
FI	ERTO (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
FI	JHL (urban public transport)		Yes		Yes	Yes		Yes		Yes	
FI	PAM (rest of road transport)			Yes	Yes		Yes	Yes			
FI	RAU (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
FR	CFTC Transports (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
FR	FGTE CFDT (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
FR	FNST CGT (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
FR	FNTL FO-UNCP (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
FR	CFE-CGC Transports	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
FR	UNSA Transports	Yes	Yes	Yes				Yes			
FR	UST Transports		Yes					Yes			
HR	SHV (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		UICR
HR	SZH-ZET (urban public transport)		Yes		Yes	Yes	Yes	Yes			
HR	SVPRZZ (urban public transport)		Yes		Yes	Yes	Yes	Yes			
HR	SPIVH (rest of road transport)			Yes	Yes	Yes	Yes	Yes			



## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
HR	USVPRH (rest of road transport)			Yes	Yes	Yes	Yes	Yes			
HU	KSZOSZ (whole road transport)	Yes	Yes	Yes						Yes	
HU	EKSZ (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
HU	Metró KDSZ (urban public transport)		Yes		Yes			Yes			
HU	TESZ (rest of road transport)			Yes	Yes	Yes	Yes	Yes			
HU	KKSZ (rest of road transport)			Yes	Yes	Yes		Yes			
IE	NBRU (whole road transport)	Yes	Yes	Yes	Yes	Yes		Yes			
IE	TSSA (whole road transport)	Yes	Yes	Yes	Yes				Yes	Yes	
IE	SIPTU (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	ITF, ETUI, IndustriAll-Europe
IE	Connect (urban public transport)		Yes		Yes	Yes	Yes	Yes			

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
IT	FILT-CGIL (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
IT	FIT-CISL (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	
IT	UILTrasporti (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	
LT	LKADPSF (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
LT	TDF (urban public transport)		Yes		Yes		Yes	Yes		Yes	
LT	BTPS 'Solidarumas'			Yes	Yes	Yes	Yes	Yes		Yes	
LT	LVPS			Yes	Yes		Yes	Yes		Yes	
LU	OGB-L Road Transport and Navigation Trade Union (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes		Yes	
LU	LCGB-Transport (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes		Yes	
LU	Syprolux (urban public transport)		Yes							Yes	

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
LV	LAKRS (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
MT	GWU (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes			Yes	
MT	UHM (urban public transport)		Yes		Yes	Yes		Yes			
NL	FNV (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
NL	CNV (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
NL	De Unie (rest of road transport)			Yes	Yes	Yes	Yes	Yes	Yes		
PL	OPZZ (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes				Yes
PL	KS KM NSZZ 'Solidarność'		Yes		Yes	Yes		Yes		Yes	
PL	ZZPKMwRP (urban public transport)		Yes		Yes	Yes	Yes				
PL	KSTD NSZZ 'Solidarność' (rest of road transport)			Yes	Yes	Yes	Yes	Yes		Yes	Yes

Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
PT	Fectrans (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
PT	SITRA (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
PT	SNMOT (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
PT	STRUN (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes			
PT	Sttamp (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes			
PT	SMAQ (urban public transport)		Yes		Yes	Yes	Yes	Yes			
PT	ASPTC		Yes		Yes		Yes	Yes			
PT	STTM (urban public transport)		Yes		Yes		Yes	Yes			
PT	SMTTP (urban public transport)		Yes		Yes		Yes	Yes			
PT	SIMM (rest of road transport)		Yes		Yes		Yes	Yes			
PT	Simmpcr (rest of road transport)			Yes	Yes						

## Representativeness of the European social partner organisations: Road transport sector

Member State	Trade union	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (at either sectoral or company level)?	Involved in industrial action for the sector in the past three years?	Affiliated with the ETF?	Affiliated with other European associations?
		Whole road transport sector	Urban public transport	Rest of road transport							
RO	SLT (rest of road transport)			Yes						Yes	
RO	ATU-România (urban public transport)		Yes		Yes		Yes	Yes		Yes	
SE	Kommunal (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
SE	Transport (whole road transport)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
SE	SEKO (urban public transport)		Yes		Yes	Yes	Yes	Yes		Yes	
SI	ZSSS-SDPZ (whole road transport)	Yes	Yes	Yes	Yes		Yes		Yes	Yes	
SI	SV LPP (whole road transport)	Yes	Yes	Yes	Yes				Yes		
SI	KS-90 – SVAS (whole road transport)	Yes	Yes	Yes	Yes		Yes	Yes	Yes		
SK	OZ KOVO (whole road transport)	Yes	Yes	Yes			Yes	Yes		Yes	
SK	IOZ (urban public transport)		Yes		Yes	Yes	Yes	Yes			

## Annex 5: Position of employer organisations/business associations in the industrial relations landscape in the Member States

Member State	Employer organisation/ business association	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	IRU member?	UITP member?
		Whole road transport	Urban public transport	Rest of road transport						
<b>Total</b>		<b>28</b>	<b>36</b>	<b>46</b>	<b>80</b>	<b>77</b>	<b>96</b>	<b>83</b>	<b>51</b>	<b>17</b>
AT	FVALS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
AT	FVGB			Yes	Yes	Yes	Yes	Yes	Yes	
AT	FVS			Yes	Yes		Yes	Yes		
AT	FVSB		Yes		Yes	Yes	Yes	Yes		Yes
AT	FVBG		Yes		Yes	Yes	Yes	Yes		
BE	FBAA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
BE	BKV-CBD			Yes	Yes	Yes	Yes	Yes		
BE	Febetra			Yes	Yes		Yes	Yes		
BE	TLV			Yes	Yes	Yes	Yes	Yes		
BE	UPTR			Yes	Yes	Yes	Yes	Yes		
BE	WF-FE			Yes	Yes		Yes	Yes		
BE	BVGSSV		Yes		Yes	Yes		Yes		Yes
BE	GTL TAXi		Yes		Yes		Yes	Yes	Yes	
BG	Aebtri			Yes	Yes	Yes		Yes	Yes	
BG	CBRH			Yes	Yes	Yes	Yes	Yes	Yes	
CZ	SD ČR	Yes	Yes	Yes	Yes		Yes			
CZ	Česmad Bohemia	Yes	Yes	Yes	Yes	Yes		Yes	Yes	
DE	BDO	Yes	Yes	Yes	Yes		Yes	Yes	Yes	
DE	DSLVL			Yes	Yes	Yes			Yes	

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	IRU member?	UITP member?
		Whole road transport	Urban public transport	Rest of road transport						
DE	BGL			Yes	Yes		Yes	Yes		
DE	VKA		Yes		Yes	Yes	Yes	Yes	Yes	
DE	AVN		Yes		Yes		Yes			
DE	BVTM		Yes		Yes	Yes		Yes		
DE	VDV		Yes		Yes		Yes	Yes		Yes
DK	DPT	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes
DK	DI	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
DK	DE	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
DK	ITD		Yes		Yes	Yes	Yes	Yes		
DK	DTL			Yes	Yes		Yes			
DK	KL			Yes	Yes		Yes	Yes		
EE	AEL	Yes	Yes	Yes	Yes	Yes	Yes			
EE	ERAA			Yes	Yes	Yes		Yes		
EL	OFAE		Yes		Yes	Yes	Yes	Yes		
EL	Ποειατα			Yes	Yes		Yes	Yes	Yes	
ES	Confibus	Yes	Yes	Yes	Yes	Yes	Yes		Yes	
ES	Anetra			Yes	Yes		Yes	Yes	Yes	
ES	ASTIC		Yes		Yes	Yes	Yes		Yes	
ES	CETM		Yes		Yes		Yes	Yes	Yes	
ES	Fenadismar		Yes		Yes	Yes	Yes			
ES	ATUC			Yes	Yes		Yes	Yes		Yes
ES	Antaxi			Yes	Yes	Yes	Yes			

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	IRU member?	UITP member?
		Whole road transport	Urban public transport	Rest of road transport						
ES	FENEVAL			Yes	Yes	Yes	Yes			
FI	ALT	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
FI	PALTA	Yes	Yes	Yes	Yes	Yes	Yes			
FI	LAL		Yes		Yes		Yes	Yes		
FI	SKAL		Yes		Yes	Yes				
FI	Taksiliikenteen Työnantajat ry			Yes	Yes		Yes	Yes		
FI	KT			Yes	Yes	Yes	Yes			
FR	FNTR		Yes		Yes		Yes			
FR	Union TLF		Yes			Yes	Yes			
FR	OTRE		Yes		Yes		Yes			
FR	FNTV		Yes			Yes	Yes	Yes		
FR	AFTRI		Yes		Yes		Yes	Yes		
FR	UTP		Yes		Yes	Yes	Yes	Yes	Yes	Yes
FR	UNIT		Yes				Yes	Yes	Yes	
FR	CSNERT			Yes	Yes		Yes	Yes		
FR	FNTI			Yes	Yes		Yes	Yes		
FR	FNAT			Yes	Yes	Yes	Yes	Yes		
FR	FNDT			Yes	Yes	Yes		Yes		
FR	UNT			Yes		Yes		Yes		
HR	HUP-UP	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
HR	HGK	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
HU	MKFE	Yes	Yes	Yes	Yes		Yes	Yes	Yes	



## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	IRU member?	UITP member?
		Whole road transport	Urban public transport	Rest of road transport						
HU	N.i.T.		Yes			Yes	Yes	Yes		
HU	Fuvosz			Yes		Yes	Yes	Yes		
HU	OTSZ			Yes	Yes	Yes		Yes		
IE	IRHA			Yes		Yes	Yes	Yes		
IE	FTAI			Yes	Yes	Yes	Yes	Yes		
IT	ANAV	Yes	Yes	Yes		Yes	Yes	Yes	Yes	Yes
IT	Fiapautotransporti		Yes		Yes	Yes	Yes	Yes		
IT	Confetra		Yes			Yes	Yes	Yes		
IT	ANITA			Yes		Yes	Yes	Yes		
IT	Asstra			Yes	Yes	Yes	Yes	Yes		
IT	AGENS			Yes		Yes	Yes	Yes		
LT	Linava	Yes	Yes	Yes	Yes	Yes		Yes	Yes	
LT	LKVA	Yes	Yes	Yes		Yes	Yes	Yes	Yes	
LT	TTLA			Yes	Yes	Yes	Yes	Yes		
LU	GT	Yes	Yes	Yes		Yes	Yes	Yes		
LU	FLEAA			Yes		Yes		Yes	Yes	Yes
LU	Federation of Taxis, Cars and Ambulances		Yes			Yes	Yes	Yes		
LV	LPPA		Yes		Yes	Yes				
LV	Latvijas auto			Yes		Yes	Yes	Yes	Yes	
MT	MEA	Yes	Yes	Yes		Yes	Yes			
MT	ATTO			Yes	Yes	Yes	Yes	Yes		

## Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	IRU member?	UITP member?
		Whole road transport	Urban public transport	Rest of road transport						
MT	Malta Chamber of SMEs	Yes	Yes	Yes		Yes	Yes			
NL	KNV			Yes	Yes	Yes	Yes	Yes	Yes	Yes
NL	TLN	Yes	Yes	Yes			Yes			
NL	Evofenedex		Yes		Yes	Yes	Yes	Yes		
NL	VVT			Yes			Yes	Yes		
NL	VWOV			Yes	Yes	Yes	Yes			
NL	VSV			Yes			Yes	Yes		Yes
PL	Pracodawcy RP			Yes	Yes	Yes	Yes	Yes		
PL	FOT		Yes				Yes			
PL	IGMK			Yes	Yes	Yes	Yes	Yes		Yes
PL	ZMPD			Yes	Yes	Yes	Yes	Yes	Yes	
PT	Antrop		Yes		Yes		Yes	Yes	Yes	Yes
PT	Antram	Yes	Yes	Yes		Yes	Yes	Yes	Yes	
PT	ANTP		Yes		Yes		Yes			
PT	Antral			Yes		Yes	Yes	Yes		
RO	UNTRR			Yes	Yes		Yes	Yes	Yes	
SE	SBF	Yes	Yes	Yes		Yes	Yes	Yes	Yes	
SE	BA	Yes	Yes	Yes	Yes		Yes	Yes	Yes	
SE	STBF	Yes	Yes	Yes			Yes			
SE	Svensk KollektivTraffik	Yes	Yes	Yes	Yes				Yes	
SI	GZS-ZPZ		Yes		Yes	Yes	Yes	Yes		
SI	OZS			Yes		Yes	Yes	Yes		

Representativeness of the European social partner organisations: Road transport sector

Member State	Employer organisation/ business association	Organises members in the following sectors?			Recognised as representative at national level?	Involved in social dialogue activities?	Consulted by the government on sector-related matters?	Involved in collective bargaining in the sector (either sectoral or company level)?	IRU member?	UITP member?
		Whole road transport	Urban public transport	Rest of road transport						
SI	ZDS		Yes		Yes	Yes	Yes	Yes		
SI	GIZ Transporti			Yes	Yes	Yes	Yes	Yes	Yes	
SK	Česmad		Yes			Yes	Yes			
SK	UDPaT			Yes	Yes	Yes	Yes	Yes		
SK	ZAD	Yes	Yes	Yes		Yes	Yes	Yes		

## Annex 6: List of all UIPT member companies

Member State	City	Company name
AT	Gmunden	STERN & HAFFERL VERKEHRSGESELLSCHAFT MBH (LOKALBAHN VOCKLAMARKT-ATTERSEE AG)
	Graz	GRAZ KÖFLACHER BAHN UND BUSBETRIEB GmbH
	Innsbruck	INNSBRUCKER VERKEHRSBETRIEBE UND STUBAITALBAHN GmbH
	Vienna	WIENER LINIEN GmbH & CO KG
BE	Antwerp	HANSEA NV
	Brussels	RENFE BRUSELAS OFICINA
	Brussels	FERROVIE DELLO STATO-UFFICIO DE RAPPRESENTANZA DI BRUXELLES
	Brussels	KEOLIS BELGIUM
	Brussels	SNCB EUROPE
	Brussels	SNCB/NMBS HOLDING
	Brussels	SOCIETE DES TRANSPORTS INTERCOMMUNAUX DE BRUXELLES
	Brussels	SOCIETE NATIONALE DES CHEMINS DE FER BELGES
	Charleroi	OTW CHARLEROI
	Ghent	CAMBIO TAXISTOP
	Jabbeke	FLANDERS COACH GROUP
	Jambes	OPERATEUR DE TRANSPORT DE WALLONIE
	Liège	OTW LIEGE-VERVIERS
	Mechelen	VLAAMSE VERVOERMAATSCHAPPIJ VVM DE LIJN
	Mons	OTW HAINAUT
	Namur	OTW NAMUR-LUXEMBOURG
	Vise	EUROBUS HOLDING
	Vise	KIBEL SA
	Wavre	OTW BRABANT WALLON
Wezembeek-Oppem	UBER BELGIUM	
BG	Sofia	STOLICHEN ELEKTROTRANSPORT PLS – SOFIA ELECTROTRANSPORT PLC
CY	Nicosia	CYPRUS PUBLIC TRANSPORT
CZ	Plzen	PLZENSKE MESTSKE DOPRAVNI PODNIKY AS
	Prague	ARRIVA HOLDING CZ SRO
	Prague	DOPRAVNÍ PODNIK HLM PRAHA AS
DE	Augsburg	STADTWERKE AUGSBURG HOLDING GmbH
	Berlin	BERLINER VERKEHRSBETRIEBE
	Berlin	DB MOBILITY LOGISTICS AG
	Berlin	DEUTSCHE BAHN AG
	Berlin	TIER MOBILITY SE
	Bochum	BOCHUM-GELSENKIRCHENER STRASSENBAHNEN AG
	Bonn	STADTWERKE BONN VERKEHRS GmbH
	Bremen	BREMER STRAßENBAHN AG
	Chemnitz	CHEMNITZER VERKEHRS-AKTIENGESELLSCHAFT
	Dortmund	DSW21
	Dresden	DRESDNER VERKEHRSBETRIEBE AG
	Düsseldorf	RHEINBAHN AG

## Representativeness of the European social partner organisations: Road transport sector

Member State	City	Company name
	Frankfurt am Main	DB MOBILITY LOGISTICS AG (DEUTSCHE BAHN AG)
	Frankfurt am Main	DB REGIO AG (DEUTSCHE BAHN AG)
	Frankfurt am Main	DB VERTRIEB GmbH
	Frankfurt am Main	VERKEHRSGESELLSCHAFT FRANKFURT AM MAIN mbH
	Hamburg	HADAG SEETOURISTIK UND FÄHRDIENST AG
	Hamburg	HAMBURGER HOCHBAHN AG
	Hamburg	S-BAHN HAMBURG GmbH
	Hannover	ÜSTRA HANNOVERSCHE VERKEHRSBETRIEBE AG
	Holzkirchen	BAYERISCHE OBERLANDBAHN GmbH
	Karlsruhe	ALBTAL-VERKEHRS-GESELLSCHAFT GmbH
	Karlsruhe	VERKEHRSBETRIEBE KARLSRUHE GmbH
	Cologne	KÖLNER VERKEHRS-BETRIEBE AG
	Leipzig	DB REGIO AG – REGION SÜDOST
	Leipzig	LEIPZIGER VERKEHRSBETRIEBE GmbH
	Leipzig	NEXTBIKE BY TIER
	Mannheim	RHEIN-NECKAR-VERKEHR GmbH
	Moers	TRANSDEV VERKHER GmbH
	München	MÜNCHNER VERKEHRSGESELLSCHAFT
	München	STADTWERKE MÜNCHEN GmbH
	Münster	STADTWERKE MÜNSTER GmbH
Nuremberg	VERKEHRS AKTIENGESELLSCHAFT NÜRNBERG	
Stuttgart	DEUTSCHE BAHN AG, DB REGIO, S-BAHN STUTT GART	
Stuttgart	STUTT GARTER STRASSENBAHNEN AG	
DK	Copenhagen	METRO SERVICE AS
	Kastrup	ARRIVA DENMARK AS
	Odense	ODENSE LETBANE
	Taastrup	DANSKE STATS BANER/DANISH STATE RAILWAYS
EE	Tallinn	AKTSIASELTS TALLINNA LINNATRANSPORT
EL	Agios Ioannis Renti	ODIKES SYGKOINONIES SA
	Athens	URBAN RAIL TRANSPORT SA
ES	Alcorcon	ARRIVA SPAIN HOLDING SL
	Alcorcon	EMPRESA DE BLAS Y CIA SA
	Barcelona	FERROCARRIL METROPOLITA DE BARCELONA
	Barcelona	FERROCARRILS DE LA GENERALITAT DE CATALUNYA
	Barcelona	MANRESA BUS SA
	Barcelona	TRAMVIA METROPOLITA SA
	Barcelona	TRANSPORTS METROPOLITANS DE BARCELONA
	Bilbao	EUSKO TREN BIDEAK – FERROCARRILES VASCOS SA
	Bilbao	METRO BILBAO SA
	La Laguna	METROTENERIFE
	Las Palmas de Gran Canaria	EMPRESA GUAGUAS MUNICIPALES SA
	Madrid	ALSA GRUPO SLU
	Madrid	AVANZA SPAIN SL

## Representativeness of the European social partner organisations: Road transport sector

Member State	City	Company name
	Madrid	EMPRESA MUNICIPAL DE TRANSPORTES DE MADRID SA
	Madrid	ENTIDAD PUBLICA EMPRESARIAL RENFE-OPERADORA
	Madrid	GLOBALVIA
	Madrid	METRO DE MADRID SA
	Madrid	METRO LIGERO OESTE SA
	Madrid	METROS LIGEROS DE MADRID SA
	Madrid	RENFE DIRECCION DE PATRIMONIO
	Madrid	RENFE VIAJEROS SA
	Malaga	EMPRESA MALAGUEÑA DE TRANSPORTES
	Malaga	METRO DE MALAGA
	Murcia	UTE OPERACION TRANVIA DE MURCIA (TRANVIA DE MURCIA)
	Oviedo	ALSA
	Parla	TRANVIA DE PARLA
	Sant Cugat del Valles	TRANSPORTS CIUTAT COMTAL SA
	Santa Cruz de Tenerife	TRANSPORTES INTERURBANOS DE TENERIFE SA
	Sevilla	METRO DE SEVILLA SOCIEDAD CONCESIONARIA DE LA JA SA
	Valdemoro	AUTÓMNIBUS INTERURBANOS SA
	Valencia	EMPRESA MUNICIPAL DE TRANSPORTES DE VALENCIA SAU
	Valencia	FERROCARRILS DE LA GENERALITAT VALENCIANA
	Valencia	METROVALENCIA
Zaragoza	AVANZA ZARAGOZA SA	
FI	Helsinki	SUOMENLINNAN LIIKENNE OY
	Kaupunkiliikenne	PÄÄKAUPUNKISEUDUN KAUPUNKILIIKENNE OY/HELSINKI METROPOLITAN AREA TRANSPORT LTD
	Tampere	CITY OF TAMPERE, PUBLIC TRANSPORT
FR	Aix-en-Provence	TRANSDEV MEDITERRANNEE
	Bordeaux	KEOLIS BORDEAUX
	Carbon-Blanc	TRANSDEV SUD OUEST
	Chambery	TRANSDEV – CHAMBERY (STAC)
	Courbevoie	KEOLIS SA
	Dijon	DIVIA MOBILITES (KEOLIS)
	Dunkerque	STDE (DUNKERQUE) SAS
	Fleury Sur Orne	KEOLIS CAEN MOBILITE
	Issy-les-Moulineaux	TRANSDEV GROUP (SIEGE SOCIAL)
	La Plaine Saint Denis	SOCIETE NATIONALE DES CHEMINS DE FER FRANCAIS
	La Plaine Saint Denis	SOCIETE NATIONALE DES CHEMINS DE FER FRANCAIS – EPIC
	La Roche-sur-Yon	COMPAGNIE DES TRANSPORTS YONNAIS
	Le Mans	SETRAM
	Le Mans	SOCIETE NATIONALE DES CHEMINS DE FER FRANCAIS
	Lorient	COMPAGNIE DES TRANSPORTS DE LA REGION LORIENTAISE
	Lorient	COMPAGNIE OCEANE
	Lorient	KEOLIS MARITIME BREST
	Lyon	GROUPE KEOLIS
	Lyon	TCL (KEOLIS)

## Representativeness of the European social partner organisations: Road transport sector

Member State	City	Company name
	Lyon	TRANSDEV
	Marcq-en-Baroeul	ILEVIA (KEOLIS)
	Marseille	REGIE DES TRANSPORTS METROPOLITAINS
	Meyzieu	TRANSDEV RhoneExpress
	Nanterre	EUROLINES FRANCE
	Nantes	SNCF PAYS DE LA LOIRE
	Nantes	SOC. D'ECO. MIXTE DES TRANSP. EN COMMUN DE L'AGGLO. NANTAISE
	Nice	TRANSDEV Pôle Côte d'Azur Corse
	Octeville-sur-Mer	TRANSDEV LE HAVRE
	Octeville-sur-Mer	TRANSDEV LE HAVRE – COMPAGNIE DE TRANSPORTS DE LA PORTE OCEANE
	Paris	COMMUNAUTO
	Paris	EAST JAPAN RAILWAY COMPANY, PARIS OFFICE
	Paris	RATP DEV
	Paris	RATP Group
	Paris	SNCF DIRECTION DE L'INNOVATION ET DE LA RECHERCHE
	Paris	SNCF GARES & CONNEXIONS
	Paris	SNCF RESEAU – EPIC
	Rennes	KEOLIS RENNES
	Rouen	TCAR (TRANSPORTS EN COMMUN DE L'AGGLOMERATION ROUENNAISE)
	Saint-Barthelemy	KEOLIS ANGERS
	Saint-Denis	SNCF DIRECTION GENERALE
	Saint-Denis	SNCF MOBILITÉS – EPIC
	Saint-Gratien	TVO Saint Gratien
	Saint-Pierre-des-Corps	KEOLIS TOURS – FIL BLEU
Saint-Priest-en-Jarez	STAS – TRANSPORTS URBAINS SAINT-ETIENNE METROPOLE	
Sotteville-les-Rouen	TRANSDEV NORMANDIE	
Toulon	RMTT – MISTRAL (TOULON)	
HR	Osijek	ARRIVA HRVATSKA (ARRIVA)
HU	Budapest	ARRIVA HUNGARY ZRT
	Budapest	BUDAPEST TRANSPORT PRIVATELY HELD CORPORATION
	Budapest	MAV-START RAILWAY PASSENGER TRANSPORT CO
	Debrecen	DKV DEBRECENI KÖZLEKEDÉSI ZRT
	Veszprem	V-BUSZ KFT
IE	Dublin	BUS ATHA CLIATH – DUBLIN BUS
	Dublin	BUS EIREANN
	Dublin	CÓRAS IOMPAIR ÉIREANN
	Dublin	IARNROD EIREANN – IRISH RAIL
	Dublin	TRANSDEV DUBLIN
IT	Agrigento Chieti	T.U.A. SRL
	Alessandria	AMAG
	Ancona	CONEROBUS SpA
	Arezzo	L.F.I. SpA
	Arezzo	TIEMME SpA
	Arnad	V.I.T.A. SpA

## Representativeness of the European social partner organisations: Road transport sector

Member State	City	Company name
	Ascoli Piceno	START SpA
	Assago	Grandi Treni Espressi (GTE) SpA
	Assergi	Centro Turistico del Gran Sasso SpA
	Asti	A.S.P. SpA
	Avellino	AIR CAMPANIA SRL
	Bari	AMTAB SpA
	Bari	FERROTRAMVIARIA SpA
	Bari	FERROVIE APPULO LUCANE SRL
	Bari	FERROVIE DEL GARGANO SRL
	Bari	MOLISE TRASPORTI SRL
	Bari	S.T.P. SpA
	Bergamo	ATB MOBILITA' SpA
	Bergamo	ATB SERVIZI SpA
	Bergamo	TEB (TRAMVIE ELETTRICHE BERGAMASCHE) SpA
	Biella	A.T.A.P. – AZIENDA TRASPORTI AUTOMOBILISTICI PUBBLICI DELLE PROVINCE DI BIELLA E VERCELLI SpA
	Bologna	MA.FER SRL
	Bologna	TPER SpA
	Bolzano	SAD – TRASPORTO LOCALE SpA
	Bolzano	SASA SpA AG – SOCIETA' AUTOBUS SERVIZI D'AREA
	Brescia	BRESCIA INFRASTRUTTURE SRL
	Brescia	BRESCIA TRASPORTI SpA
	Brindisi	SOCIETA' TRASPORTI PUBBLICI BRINDISI SpA
	Cagliari	ARST SpA
	Cagliari	CTM SpA
	Camerino	CONTRAM SpA
	Casale Monferrato	A.M.C. SpA
	Catania	AMTS
	Catania	FERROVIA CIRCUMETNEA
	Catanzaro	A.M.C. SpA
	Catanzaro	FERROVIE DELLA CALABRIA SRL
	Cesena	START ROMAGNA SpA
	Chieti	TUA SpA
	Como	ASF AUTOLINEE
	Como	SPT Holding SpA
	Cosenza	A.M.A. CO
	Costa Volpino	NAVIGAZIONE LAGO D'ISEO SRL
	Domodossola	SOCIETA' SUBALPINA DI IMPRESE FERROVIARIE SpA
	Fermo	S.T.E.A.T.
	Ferrara	F.E.R. SRL
	Ferrara	SST Trasporti SRL
	Florence	BUSITALIA – SITA NORD SRL
	Florence	TRENITALIA SpA
	Foggia	A.T.A.F. SpA



## Representativeness of the European social partner organisations: Road transport sector

Member State	City	Company name
	Gaeta	SAR MEDITERRANEA
	Gallarate	AMSC SpA
	Genoa	AZIENDA MOBILITA' E TRASPORTI SpA
	Gorizia	AZIENDA PROVINCIALE TRASPORTI SpA
	Imperia	RIVIERA TRASPORTI SpA
	La Spezia	ATC ESERCIZIO SpA
	Lamezia Terme	LAMEZIA MULTISERVIZI SpA
	Lanciano	SANGRITANA SpA
	L'Aquila	A.M.A. SpA
	Lecce	S.G.M. SOCIETA' GESTIONE MULTIPLA SpA
	Lecco	LINEE LECCO SpA
	Lodi	Star Mobility SpA
	Macerata	A.P.M. AZIENDA PLURISERVIZI MACERATA SpA
	Mantova	APAM ESERCIZIO SpA
	Messina	Azienda Trasporti Messina SpA
	Milan	AZIENDA TRASPORTI MILANESI SpA
	Milan	ARRIVA ITALIA RAIL SRL
	Milan	E-VAI
	Milan	FERROVIENORD SpA con socio unico
	Milan	FNM AUTOSERVIZI SpA
	Milan	FNM SpA
	Milan	GESTIONE GOVERNATIVA NAVIGAZIONE LAGHI
	Milan	RAIL DIAGNOSTICS SpA
	Milan	TRENITALIA SpA Divisione
	Milan	TRENORD SRL
	Modena	SOCIETA' EMILIANA TRASPORTI AUTOFILOVIARI SpA
	Modugno	MICCOLIS SpA
	Molfetta	M.T.M. – MOBILITA' E TRASPORTI MOLFETTA SRL
	Naples	CONSORZIO UNICOCAMPANIA
	Novara	SUN SpA
	Novate Milanese	DB CARGO ITALIA
	Novi Ligure	CIT SpA
	Nuoro	A.T.P.
	Olbia	A.S.P.O. SpA
	Osio Sotto	TBSO SpA
	Ovada	S.P.A.S.A.A.M.O. – SOCIETA' AUTOLINEE ALTO MONFERRATO OVADESE
	Padova	BUSITALIA VENETO SpA
	Padova	INFRASTRUTTURE VENETE SRL
	Padova	SISTEMI TERRITORIALI SpA
	Palermo	AMAT PALERMO SpA
	Palermo	AUTOLINEE GALLO SRL
	Palermo	GIAMPORCARO AUTOLINEE SRL
	Palermo	SAIS
	Palermo	SARP TRASPORTI SRL

## Representativeness of the European social partner organisations: Road transport sector

Member State	City	Company name
	Palmi	PIANA PALMI MULTISERVIZI SpA – P.P.M. SpA – TERMINAL BUS
	Parma	TEP SpA
	Perugia	MINIMETRO' SpA
	Perugia	UMBRIA T.P.L. E MOBILITA' SOCIETA' PER AZIONI
	Piacenza	TEMPI AGENZIA SRL
	Piombino	ATM SpA
	Pisa	CTT NORD SRL
	Pistoia	COPIT SpA
	Porcia	NOMAGO Italia SRL
	Pordenone	ATAP SpA
	Reggio Calabria	ATAM
	Reggio Emilia	LVL INTERLINES SRL
	Reggio Emilia	TRASPORTI INTEGRATI E LOGISTICA SRL – SERVIZI E MANAGEMENT TIL SRL
	Rieti	ASM RIETI SpA
	Rome	A.T.R.A.L.S.C.R.L. – GRUPPO CO.TRA.L. SpA
	Rome	AZIENDA PER I TRASPORTI AUTOFERROTRANVIARI DEL COMUNE DI ROMA
	Rome	FERROVIE DELLO STATO ITALIANE SpA
	Rome	RETE FERROVIARIA ITALIANA
	Rome	TRENITALIA SpA
	Saluzzo (Torino)	BUS COMPANY SRL
	San Cesario di Lecce	SOCIETA' TRASPORTI PUBBLICI DI TERRA D'OTRANTO SpA
	San Donà di Piave	ATVO SpA
	San Donà di Piave	F.A.P. AUTOSERVIZI SpA
	Sassari	A.T.P.
	Savona	TPL LINEA SRL
	Scandicci	GEST SpA
	Scandicci	LI-NEA SpA
	Scandicci	RATP DEV ITALY
	Siena	BYBUS
	Siena	SIENA MOBILITA'
	Siena	TRA.IN SpA
	Taormina	ASM
	Taranto	A.M.A.T. SpA
	Taranto	CTP SpA
	Tolentino	ASSM SpA
	Torino	GTT SpA
	Trani	AMET SpA
	Trapani	A.T.M. SpA TRAPANI (EX SAU/TRAPANI)
	Trieste	TRIESTE TRASPORTI SpA
	Udine	Arriva Udine SpA
	Udine	SOCIETA' FERROVIE UDINE – CIVIDALE SARL
	Urbino	AMI SpA – AZIENDA PER LA MOBILITA' INTEGRATA E TRASPORTI
	Varese	A.V.T. – AZIENDA VARESINA TRASPORTI SpA
	Vasto	AUTOSERVIZI CERELLA SRL

## Representativeness of the European social partner organisations: Road transport sector

Member State	City	Company name
	Venice	ACTV SpA
	Venice	ALILAGUNA SpA
	Venice	AVM SpA
	Verbania	V.C.O. TRASPORTI SRL
	Verona	AMT3 SpA
	Verona	ATV SRL
	Vicenza	SOCIETÀ VICENTINA TRASPORTI A RESPONSABILITÀ LIMITATA – S.V.T. SRL
	Viterbo	FRANCIGENA SRL
LU	Luxembourg	LUXTRAM SA
	Luxembourg	SERVICE DES TRANSPORTS EN COMMUN DE LA VILLE DE LUXEMBOURG
LV	Riga	RIGA MUNICIPALITY LLC 'RĪGAS SATIKSME'
MT	Luqa	MALTA PUBLIC TRANSPORT SERVICES (OPERATIONS) LTD
NL	Amersfoort	QBUZZ
	Amsterdam	GVB HOLDING
	Breda	VTNL VEOLIA TRANSPORT NL
	The Hague	HTM PERSONEN VERVOER NV
	Deventer	KEOLIS NEDERLAND
	Heerenveen	ARRIVA NEDERLAND
	Hilversum	TRANSDEV NEDERLAND
	Kampen	CONNEXION HOLDING NV
	Purmerend	EBS PUBLIC TRANSPORTATION BV
	Rotterdam	ROTTERDAMSE ELEKTRISCHE TRAM
	Utrecht	NEDERLANDSE SPOORWEGEN
	Utrecht	NEDRAILWAYS
	Utrecht	OV UTRECHT
	Zwijndrecht	AQUALINER GROUP BV
PL	Poznan	MIEJSKIE PRZEDSIĘBIORSTWO KOMUNIKACYJNE W POZNANIU SPOLKA zoo
	Warsaw	ARRIVA POLSKA
	Warsaw	METRO WARSZAWSKIE SP zoo
	Warsaw	MIEJSKIE ZAKŁADY AUTOBUSOWE SPOLKA zoo
	Warsaw	MOBILIS SP zoo
	Warsaw	TRAMWAJE WARSZAWSKIE SP zoo Ltd
PT	Almada	TRANSPORTES SUL DO TEJO SA
	Braga	TRANSPORTES URBANOS DE BRAGA EMPRESA MUNICIPAL
	Coimbra	METRO-MONDEGO SA
	Lisbon	COMPANHIA CARRIS DE FERRO DE LISBOA SA
	Lisbon	CP – COMBOIOS DE PORTUGAL EPE
	Lisbon	METROPOLITANO DE LISBOA
	Lisbon	TRANSTEJO – TRANSPORTES TEJO SA
	Matosinhos	TRANSDEV MOBILIDADE SA
	Pinheiro	ARRIVA PORTUGAL
	Porto	METRO DO PORTO SA
	Porto	STCP – SOCIEDADE DE TRANSPORTES COLECTIVOS DO PORTO SA
RO	Bucharest	SOCIETATEA DE TRANSPORT BUCURESTI SA

## Representativeness of the European social partner organisations: Road transport sector

Member State	City	Company name
	Oradea	ORADEA TRANSPORT LOCAL SA
SE	Bromma	TRANSDEV SVERIGE AB
	Malmö	GO-AHEAD SVERIGE AB
	Stockholm	KEOLIS SVERIGE
	Stockholm	MTR NORDIC AB
	Stockholm	WAXHOLMS ÅNGFARTYGS AB
	Västra Frölunda	STYRSÖ SKÅRGARDSTRAFIK AB Göteborg
SI	Ljubljana	JAVNO PODJETJE LJUBLJANSKI POTNISKI PROMET doo
	Maribor	ARRIVA SLOVENIA
	Maribor	JAVNO PODJETJE MESTNI POTNISKI PROMET MARPROM doo
SK	Komarno	ARRIVA SERVICE SRO
	Poprad	SLOVENSKA AUTOBUSOVA DOPRAVA POPRAD, AKCIOVA SPOLOCNOST

## Annex 7: Network of Eurofound Correspondents

This annex lists the national correspondents who contributed to this report.

Member State	Correspondent(s)	Organisation
AT	Bernadette Allinger	Working Life Research Centre
BE	Dries Van Herreweghe	HIVA Research Institute, KU Leuven
BG	Gabriela Yordanova	Institute of Philosophy and Sociology, Bulgarian Academy of Sciences
CY	Alexandros Perdikes	INEK Cyprus Labour Institute
CZ	Ales Kroupa	RILSA Research Institute for Labour Affairs
DE	Sandra Vogel	German Economic Institute
	Thilo Janssen	Boeckler Foundation
DK	Carsten Jorgensen and David Tobias Juul Lauesen	FAOS, University of Copenhagen
EE	Kelly Toim	Praxis Centre for Policy Studies
EL	Elena Kousta	GSEE Labour Institute
ES	Juan Arasanz	Notus Investigación Social Aplicada
FI	Elina Härmä	Oxford Research AB
FR	Frédéric Turlan	IR Share
HR	Predrag Bejakovic and Irena Klemencic	Institute of Public Finance
HU	Nóra Krokovay and Szilvia Borbely	Kopint-Tárki Institute for Economic Research
IE	Rosanna Angel	IRN Publishing
IT	Alessandro Smilari	Fondazione Giacomo Brodolini SRL SB
	Silvio Bologna	UNIPA
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research
LV	Krišs Karnītis	EPC Ltd
MT	Louis Grech	University of Malta
NL	Thomas de Winter	Panteia BV
PL	Monika Helak	Polityka Insight
	Ewelina Wołosik	Ecorys Polska
PT	Reinhard Naumann	CESIS – Centre for Studies on Social Intervention
RO	Stefan Guga	Syndex
	Nicoleta Voicu	Inova Republica
SE	Nils Brandsma	Oxford Research AB
SI	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
SK	Daniela Kešelová, Miroslava Kordošová and Zuzana Turkovič	Institute for Labour and Family Research

## Annex 8: List of all business associations included in the study and organisations without data on their status

This annex provides further information about the 18 business associations included in the study.

Member State	Business association	Considered representative based on legal criteria/mutual recognition?	Involved in collective bargaining?	Involved in social dialogue (bipartite/tripartite)?	Consulted by the government?	Covering urban public transport/rest of road transport/both?	Affiliated with the UITP or IRU?
BG	Aebtri	Yes	No	No	Yes	Rest of road transport	IRU
BG	CBRH	Yes	No	No	Yes	Rest of road transport	IRU
CZ	Česmad Bohemia	Yes	No	No	Yes	Both	IRU
DE	BVTM	Yes	No	No	Yes	Urban public transport	IRU
DK	DPT	Yes	No	Yes	Yes	Both	IRU, UIPT
DK	ITD	Yes	Yes	Yes	Yes	Rest of road transport	IRU
EE	ERAA	Yes	No	Yes	Yes	Rest of road transport	IRU
EL	OFAE	Yes	No	Yes	Yes	Rest of road transport	IRU
EL	Ποσειδά	Yes	No	No	Yes	Urban public transport	IRU
ES	ATUC	Yes	No	No	Yes	Urban public transport	UIPT
ES	Fenadismer	Yes	No	Yes	Yes	Rest of road transport	
FR	UNIT	Yes	No	No	Yes	Urban public transport	IRU
FR	AFTRI	Yes	No	No	Yes	Rest of road transport	IRU
HU	MKFE	Yes	Yes	Yes	Yes	Both	IRU
IE	IRHA	Yes	Yes	No	Yes	Rest of road transport	
IE	FTAI	Yes	No	No	Yes	Rest of road transport	
MT	ATTO	Yes	No	No	Yes	Rest of road transport	IRU
NL	VSV	Yes	Yes	Yes	Yes	Urban public transport	UIPT

The following table provides information on organisations for which no data were available on their status as either an employer organisation or a business association.

Member State	Organisation	Considered representative based on legal criteria/mutual recognition?	Involved in collective bargaining?	Involved in social dialogue (bipartite/tripartite)?	Consulted by the government?	Covering urban public transport/rest of road transport/both?	Affiliated with the UITP or IRU?
BE	FBAA	Yes	Yes	Yes	Yes	Both	IRU
DE	VDV	Yes	No	Yes	Yes	Urban public transport	UITP
DK	DE	Yes	No	No	Yes	Both	
DK	DTL	Yes	Yes	Yes	Yes	Rest of road transport	IRU
ES	Anetra	Yes	Yes	Yes	Yes	Urban public transport	IRU
FI	PALTA	Yes	Yes	Yes	Not known	Both	
LT	LKVA	Yes	No	No	Yes	Both	
LU	Federation of Taxis, Cars and Ambulances	Yes	Yes	No	No	Urban public transport	
LV	LPPA	Yes	No	No	Yes	Both	
PL	FOT	Yes	No	Yes	Yes	Urban public transport	
PL	IGMK	Yes	Not known	Not known	Not known	Urban public transport	UITP
PT	ANTP	Yes	Not known	Not known	Not known	Rest of road transport	
SK	Česmad	Yes	Not known	Not known	Not known	Rest of road transport	IRU

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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the road transport sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements.

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. The methodology of this study is based on the representativeness criteria specified in European Commission Decision 98/500/EC. The study also aims to identify opportunities for capacity building and provide guidance for decision-making regarding the request for a separate European sectoral social dialogue committee for urban public transport activities.

This study identified the representative social partners as the European Transport Workers' Federation (ETF), representing workers in road transport and urban public transport; IRU Europe, the European section of the International Road Transport Union, representing employers in road transport and urban public transport; and UITP Europe, the European section of the International Association of Public Transport, representing employers in urban public transport.

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