



TRENDS IN TRANSPORT

ECONOMIC DEVELOPMENTS & GLOBALISATION TECHNOLOGICAL DEVELOPMENTS: AUTOMATION & DIGITALISATION DEMOGRAPHIC CHANGE CLIMATE CHANGE

ANTICIPATE AND ACT

DISCUSSION PAPER

1. GENERAL INTRODUCTION: SETTING THE SCENE

The world of work is always changing, posing new challenges for workers and their representatives. To assess the future of employment in the European transport sector, trade unions need to deal with global mega-trends. “Mega-trends are middle or long-term changes whose effects will reach deep into social, ecological, and economic systems and have a major influence on future developments.”¹ Trends in economics, technology, climate, and demographics are especially relevant to the development of the transport sector in Europe. The ETF, its affiliates and workers’ representatives must take part in shaping these changing social realities. To do so, they need knowledge, influence, and a strategy.

The ETF TRENDS project² analysed and discussed with the ETF affiliates in 4 sub-regional Conferences four mega trends, which have and will have an impact on the future of the transport sector and thus on transport workers:

- Economic developments & globalisation
- Technological developments: automation & digitalisation
- Demographic change
- Climate change

The ETF project aimed to build knowledge and discuss the right way for trade unions to act at European, national and local level. The following is a summary of the key findings and a suggestion for ETF and trade union action in different areas at different levels.

2. SHORT DESCRIPTION OF THE TRENDS

2.1 Economic developments and globalization

The OECD estimates that by 2050 one third of global trade will take place between non-OECD countries against 15% today. However, the estimates predict still increasing transport in Europe for the coming decades despite economic stagnation or slow economic growth. The driving force for globalization but also the EU Internal Market is deregulation. At global level the new trade agreements like CETA and TiSA intend to liberalise transport services and threaten labour standards and the capacity of governments to regulate. Furthermore we observe that more

¹ Dispan, Jürgen und Pfäfflin, Heinz (2014): Nachhaltige Wertschöpfungsstrategien. Unternehmensstrategien im Kontext von Industriepolitik und Megatrends. Edition Hans Böckler Stiftung .. p. 11





and more non-EU companies invest in European transport companies and transport infrastructure and thus assuming control. Open markets stimulate as well concentration and multinational companies are more and more determining the conditions for transport services. We observe as well that new actors are entering the transport market, large technology companies like Google or Amazon that introduce new business models like the platform economy or getting engaged in autonomous driving. Industry will shift to major airport and ports and stimulate logistics cluster to use more efficient logistics. Transport of goods will be largely organized around those logistics hubs and along major corridors. Transport services, however, will be more fragmented due to out-sourcing and sub-contracting for cost saving with rendering working conditions more precarious.

2.2 Technological developments: Automation and digitalisation

In principle, three different elements have to be distinguished with different a impact on workers:

- I. Technologies that are replacing jobs by machines/robots (automation);
- II. Technologies used for rationalization of existing work;
- III. Technologies used to build platforms for new disruptive business models; those are decisively changing the world of labour.

All transport modes are concerned by automation: autonomous driving of trucks, busses, trains and metro, autonomous navigation on rivers and at sea, drones in aviation, autonomous loading and unloading in harbors or automated warehousing. The technology is available, tests are taking place and the question is time, investment, regulation and acceptance.

Digital technologies to rationalize work are several: optimization of tracing and tracking (use of GPS, ITS in Europe) for freight and passenger transport, digital ticketing and passenger information system; drivers' assistance systems e.g. for eco-driving, sensors used in maintenance (e.g. track inspection, anticipated maintenance planning); traffic control (ERTMS in railways). But also augmented reality like data glasses used in warehousing, which add additional information in the field of vision of the warehouse worker and can be used to scan bar codes.

For trade unions the rationalization effect of technology and the challenge for trade unions and workers representatives are not new but with the enormously increased digital capacity and capacity of data transfer and combination there are more possibilities for companies (for example workers performance control) and in more areas of implementation.

Digital platforms are different because they are disruptive business models that are changing the world of labour. Platforms in transport match demand for transport services with individual drivers and “disrupt” the traditional employer – employee relationship.

It is also important to be aware, that many of those developments are not initiated and tested by the classical transport companies but by technology companies instead, like Google and Amazon.

2.3 Demographic change

The following elements are relevant in Europe with potential impact on transport and transport workers:

- Reduced population growth in Europe with differences in individual countries, contrary to strong growth worldwide and in particular in Africa and Asia; this creates challenges for the traditional organization of social security systems in Europe;
- Population growth in some countries in Europe will be largely based on migration including brain-drain (migration of young well educated people) within Europe and from outside Europe;
- An aging population in Europe with different transport needs and transport patterns;
- On-going urbanization on the one hand and depopulation in rural areas on the other hand;
- An aging work force in particular also in transport.



It is difficult to make statements on the quantitative effects of a shrinking population on transport demand and business. It can be assumed that a shrinking population in a country or in rural or economically disadvantaged area will generate less demand for freight or passenger transport and thus less transport jobs in those areas. While in urban areas and economic centers in Europe demand for transport services and thus jobs will increase. More important are the qualitative aspects, what kind of transport systems will be established in particular in rural areas. Public transport systems are threatened to be abolished and replaced by individual precarious forms of transport offer. Furthermore, an aging population has different transport needs, door to door transport becomes more important as well as accessibility aspects.

2.4 Climate change

Climate change, the increase of global temperature is already a reality. The consequences of global warming are an increase of the sea level with flooding of coastal regions and entire island countries and the increase of extreme weather conditions (storms, floods, heat & desertification of entire regions but also unusual cold in other areas). Extreme weather conditions have also a negative impact on transport, they destroy transport infrastructure, disrupt/obstruct transport services and have a negative economic impact on transport companies, their workers and society. Therefore 195 states signed the 2015 Paris Agreement with the objective holding the increase of the global temperature well below 2°C and to pursue efforts to limit the temperature increase to 1.5°C above pre-industrial levels.

Global warming is caused by CO₂ emissions. The share of transport on those emissions is about 25% and in Europe transport is the single sector with still increasing CO₂ emissions. There is no doubt that the transport sector has to reduce its CO₂ emissions (decarbonize), the question is how. And this is important for transport trade unions and workers who have to get involved.

The ETF 2009 and 2013 Congress took the position to promote sustainable transport and that actions in all strategic areas are necessary: Avoiding – shifting – improving. However, the ETF insists as well in its political positioning and action that ecological sustainability and social sustainability have to go hand in hand and are the two sides of the same coin.

3. IMPACT OF THE TRENDS ON EMPLOYMENT, WORKING CONDITIONS AND TRANSPORT PROFESSIONS

3.1 Economic developments and globalization

In quantitative terms globalization and its European counterpart EU Internal Market is generating more transport flows and thus potentially more employment in transport. Although there will be a shift of economic growth from the OECD countries to the BRICS countries and the Asia/Pacific region, transport in Europe is still estimated to grow until 2050. Climate change and demographic changes might have a bigger impact on transport volumes than economic shift.

More concern for trade unions is the qualitative aspect of the current neo-liberal model of globalization: it is a deregulation and concentration process. Regulatory standards and trade union achievements being eliminated and private capital and multinational companies determining the conditions for transport services.

OPPORTUNITIES	THREAT
Potentially more jobs for transport & logistics workers with increasing global trade and increasing trade within the EU Internal Market;	Quality of jobs: Globalization and EU Internal Market are largely deregulation projects based on social dumping;



<p>potentially more jobs in passenger transport;</p> <p>vulnerable logistics chains can increase union bargaining power;</p>	<p>Working conditions and workers' rights are at threat;</p> <p>Cost cutting measures are the driving force with outsourcing and sub-contracting, (faked) self-employment, FOC similar business models in other transport modes;</p> <p>The new generation of international trade agreements (TTIP, CETA, TiSA) threatens to undermine workers' rights and the regulatory power of countries;</p> <p>Concentration processes lead to few multinational corporations, which work more and more sub-contracted fragmented transport service providers;</p>
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3.2 Technological developments: Automation and digitalisation

All transport modes and logistics are concerned by automation and digitalisation. Pessimistic estimations predict job losses for the overall economy between 40-50%, more optimistic estimations between 8-10%. In transport entire professions might disappear, like drivers or Dockers. Transport services in a closed and predictable environment are first affected and all repetitive tasks that can be easily programmed and taken over by computers or robots. New jobs will be rather jobs in supervision of computers and programming jobs. Both tendencies, de-qualification of jobs for example in maintenance and up-skilling of jobs is possible. Potentially there should be more opportunities for work in customer care and customer services.

Digitalisation allows more effective de-localisation of transport service jobs, even the supervising of machines or vessels, trains, trucks can be de-localised.

And digitalisation has a huge impact on Health & Safety at work (psychosocial risks): permanent connectivity, higher potential for performance control and supervision. There is a problem of workers' data protection.

OPPORTUNITIES	THREAT
<p>work load in heavy jobs or monotonous tasks can be reduced; positive for H&S at work;</p> <p>supportive technology with potential for higher transport safety;</p> <p>more higher skilled jobs e.g. in supervision of machines can be created;</p> <p>more tasks in customer service - showing the human face – can be created;</p> <p>there is more potential for a better work-life</p>	<p>High employment reduction through automation & digitalisation; entire professions might disappear;</p> <p>Jobs for relatively low skilled workers disappear;</p> <p>Delocalization of digital jobs everywhere in the world; no geographic limits increase social dumping;</p> <p>unemployment of elderly workers not having been trained on new digital technologies;</p>



<p>balance;</p> <p>potential for trade unions to negotiate working time reduction;</p> <p>potential for unions to negotiate more education and training measures;</p>	<p>the human face might disappear in passenger transport (electronic information and ticketing);</p> <p>Increased psycho-social risks/health & safety risks through efficiency increases, tracing and tracking, performance supervision;</p> <p>H&S risks due to blurred borders between work and private life;</p> <p>Threat for workers' data protection;</p>
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Platform economy: Platforms pretend to create job opportunities for unemployed, for people preferring independent and autonomous work, that they allow a better work-life balance. In reality they create a new digital precariat at least among the less skilled workers.

OPPORTUNITIES	THREAT
<p>There are non without regulatory framework that ensures:</p> <ul style="list-style-type: none"> • Employers' responsibilities for platforms including tax and social security contribution; • Transport company responsibilities regarding operational safety, liability; • Workers statute; • Decent wages and full social security coverage; • Training and qualification; • Collective representation. 	<p>The traditional worker-employer relationship disappears;</p> <p>New precarious workforce due to lack of work contract, training, social security (health, unemployment, pension)</p> <p>In transport very low "wages";</p> <p>Difficult collective representation of workers interests;</p> <p>Unfair competition to traditional regulated professions (disruptive business model);</p> <p>Safety and security problems due to lack of training;</p> <p>Performance check without possibility to react / negotiate;</p> <p>For society: Challenge for tax and social security systems</p>

3.3 Demographic change

It is most difficult to make estimates on the impact of demographic change on employment in transport in Europe.

In short term we see that in certain countries and in certain professions the aging population and the aging work force in transport companies create recruitment problems. This combined with the bad reputation of transport not being attractive for young workers creates big problems for workers, who are exposed to a high level of stress due to lack of personnel. Similar effects appear in countries, which are suffering of brain drain, where the young



and well educated workers are leaving the country. This situation might evolve also in countries not yet concerned.

In those countries or sectors demographic change can be an opportunity to increase bargaining power of unions for better working conditions. This is possible only when social dumping is prevented.

In other countries the same sector and same professions have high reputation and there are no recruitment problems because the professions are recognized, the payment and working conditions are good, the training is well organized and job stability can be guaranteed.

We know however that the average age of transport workers is very high in Europe and that within the next 10 years many workers will retire. A shrinking population on the one hand and lack of attractiveness of transport on the other hand can create a lot of problems in all countries.

How countries, regions, urban areas and transport professions are effected depends largely on the economic development and level of unemployment in each country and region.

An aging population requires new transport patterns. Door to door services in passenger and delivery transport will become more important. There might be new more human related jobs and job profiles needed to meet the needs of older people.

OPPORTUNITIES	THREAT
<p>Job creation in urban areas; relevant is the quality of jobs (e.g. platform economy)</p> <p>Aging population: new job profiles in an aging society: more human related;</p> <p>Potentially more demand for delivery services and thus job opportunities;</p> <p>Aging workforce: Better bargaining power for unions in a situation of lack of skilled workers;</p> <p>Opportunity to negotiate retention measures;</p> <p>Higher diversity with good integration of migrant workers;</p>	<p>Job losses in rural areas;</p> <p>Introduction of casual work to offer certain transport services in rural areas;</p> <p>High average age of transport workers and high retirement rate within the next 10 years;</p> <p>Recruitment problems in companies; increased burden for workers having permanent overtime; H&S problems;</p> <p>Social dumping practices instead of better bargaining power for unions;</p> <p>Automation used as an argument to meet lack of skilled personnel (drivers);</p>

3.4 Climate change

Global warming itself with extreme weather conditions (heat, water, storms) is a big threat for the economy and people. In transport destroyed infrastructure can negatively affect transport companies economically. There higher imminent safety and Health & Safety risks for workers.

However, more relevant is the impact of strategies to prevent global warming and here in particular strategies for decarbonizing transport.



OPPORTUNITIES	THREAT
<p>Job opportunities in public transport, rail and sea going transport modes;</p> <p>Opportunity to stop social dumping and impose fair wages and working conditions within the discussion on fair pricing and fair rates in transport;</p> <p>New skills requirements to steer and maintain vehicles with new clean technologies;</p> <p>Modernization of rolling stock usually improves works ergonomics and thus H&S at work;</p>	<p>Challenges for road transport and aviation jobs (just transition);</p> <p>Health and safety problems in congested and polluted urban areas without measures;</p> <p>Safety problems in emergency situations due to extreme weather conditions;</p>

3.5 The TRENDS are interlinked

The TRENDS are intertwined and a positive impact of one of the trends can have a negative impact on the other. Some examples are:

- Globalisation and the EU Internal Market increase transport with positive effects on quantitative transport employment but with negative impact on climate change.
- Digitalisation/automation facilitates globalization but might neutralize the positive impact of globalization on transport jobs and negative impact on climate change.
- Certain technologies (3 D printing) might re-localize certain production with negative impact on transport jobs but positive impact on climate change.
- Technological developments make transport cleaner, more energy efficient and increase efficiency of logistics systems and transport flows: positive impact on climate change, potential negative impact on transport jobs or quality of transport jobs.
- The platform economy facilitates sharing models with a positive impact on climate change but negative quantitative and /or qualitative impact on transport jobs when replacing public transport or organized as disruptive business model like Uber.

It is not possible to quantify the different trends regarding employment and quality of employment. What is important is to understand the different effects and direction of effects for a proper anticipation and decision for action.

4. TRADE UNION ACTION

Trends are long term developments, they are interlinked and complicate to anticipate in particular when looking at a specific trend in a specific country or region at a specific moment. We have to develop our trade union strategy by understanding the potential threats and opportunities and identifying the right level and levers to act.



Our objective is clear: to maintain and improve qualitative employment and working conditions for transport workers and fishermen and women.

Some messages from the 4 sub-regional Conferences in Gdansk, Madrid, Zagreb and Vienna:

Deregulation is felt as the biggest threat for transport workers and trade unions. It undermines working conditions and destroys acquired labour and trade union rights.

Technological developments cannot be stopped, fighting technology is no option. Important is to understand positive and negative elements, negotiate transition conditions and regulate the new challenges for the workers-employers relationship and collective representation coming with the so-called “fourth technological revolution”.

Digitalisation and the platform economy are a societal issue: trade unions should have a word in shaping taxation and social security systems of the future as well as overall working time reduction, the distribution of work.

Climate change is a threat for the people and the planet. Stopping global warming is a responsibility of all. It’s the future of young workers.

Trends are global and we have to act at all levels, global, European, national and local. At each level we have our strengths and we have to use our strengths. But we have to increase our strength

- by understanding our weaknesses and adapting accordingly;
- by working together and support each other in solidarity and unity.

Our strengths:

- We are mass organisations;
- We are close to the workers and have a mandate to speak and negotiate in their name;
- We are organised and have democratic structures that gives us legitimacy and credibility;
- We can mobilise our members and show power through actions;
- Through ITF and ETF we are organized globally and European and have the capacity to speak with one voice;
- We can demonstrate successes through achieved rights, social protection and CBAs.

Our weaknesses:

- Our achievements are at threat that puts us in a defensive position;
- Individualization of the society is counteracting collective organization, representation and negotiation;
- Young workers and women are not attracted by trade unions;
- The world of labour is changing and our traditional basis for organising workers dissolves;
- Transport services are more and more fragmented while the decision power lies in the hand of few multi-national corporations, with digitalisation even in the hands of non-transport technology corporations;

To achieve our objective we have to act in three areas of action:

- Political action at political level and regulation



- Industrial relations/negotiations and social dialogue
- Building trade union power and building alliances

Political action at political level and regulation

Political decisions for example on the investment in transport infrastructure (which transport mode, which priority areas) or the establishment of local, regional and national transport plans or the social, economic and transport regulatory framework are largely influencing the development of transport and the conditions for transport workers.

Trade unions have to get involved and influence political decisions and the regulatory framework. It is wrong to stay away and limit the trade union involvement to negotiation of working conditions and pay.

The TRENDS are global but their impact on workers also depends on political and regulatory decisions. The sooner trade unions understand such trends the sooner they can act proactive and influence.

Industrial relations/negotiations and social dialogue

The core activity of trade unions is and remains the negotiation of working conditions for workers they represent. The TRENDS signify changes in society, economy and thus at the work place. The changes influence the priorities and strategic decisions for trade unions on the topics and demands for negotiations and the topics of social dialogue in the sectors and companies. The trends, like automation & digitalisation should be subject of sector social dialogue because also the employers do not fully understand the future of their sector.

Building trade union power and building alliances

Power is necessary to influence political and regulatory decisions and to set the agenda for negotiations and achieving results. First of all unions get power by being representative as much as possible and by being professional. The changes in the transport sector with fragmentation and de-localisation also of decision power and the individualization of society are difficult challenges.

But trade unions do not have to act alone, building industrial and political alliances, temporary or structural, is indispensable for increasing power. The TRENDS show societal changes, not only in the world of labour. Therefore it is important to act with other representatives of the society together.

4.1 Economic developments and globalization

4.1.1 Political and regulatory action

Globalisation and its European counterpart 'Internal Market' as such are not rejected by trade unions. They must be fair and controlled by society and not by multinational or European corporations. They must not be based on deregulation but on assuring fair and decent working conditions for everybody and the chance to develop.

ETF level: The ETF Fair Transport Campaign for fair pay and quality working conditions and against social dumping combined with ETF resistance against the EU deregulation agenda for the different transport modes are the strategic priorities to fight negative effects of the Internal Market.

This must be complemented by a strong involvement in alliances with the European trade union movement and NGOs for broader political objectives:

- A social compact, a true pillar of social rights; protecting labour and social rights;
- Assuring trade union influence in new forms of work;
- Acting against the new generation of international trade agreements – for fair trade agreements and fair globalization.



Affiliates' level: Complementing and supporting European activities by influence national governments on the same topics. All legislative EU decisions and decisions on international trade agreements are decided by the national governments and members of the European Parliament elected in each Member State.

4.1.2 Industrial relation and social dialogue

ETF level: Within the European social dialogue two points of action are possible to shape or prevent the negative impact of the internal market and/or globalization:

- Negotiating social standards to prevent social dumping (existing examples: several working time agreements, agreements on the implementation of international social standards in EU legislation);
- Negotiating and insisting on social clauses in bi-lateral agreements of the EU with third countries (examples do exist like in the fisheries or the aviation sectors).

However, without stronger trade union power such agreements at European level remain an exemption.

Affiliates' level: It is the core business of trade unions to negotiate and use industrial actions to protect and improve working conditions and in particular those who are vulnerable to the impact of deregulation but also automation & digitalisation. Understanding the impact of the trends and European and global cooperation help unions to make strategic decisions.

4.1.3 Building trade union power and building alliances

ETF level: Organising is taking place at national level by national trade unions. But the characteristics of the Internal Market or of globalization is that companies organise their business across borders. Targeted global and European campaigns are the right answer to build trade union strength. The ITF 4-levers-strategy is a good instrument to identify the right targets.

This includes alliances with other trade union federations with common interests for mutual support.

Globalisation and here in particular the new generation of trade agreements (TTIP, CETA, TiSA) with their objective to deregulate (transport) services and limit the regulatory power of governments forms substantial common ground for alliances with NGOs.

Affiliates' level: In the sense of getting stronger through acting together it is necessary that affiliates get actively involved in global and European campaigns.

This includes developing national organizing campaigns in the targeted companies and building alliances at national level

4.2 Technological developments: Automation & digitalisation

Automation & digitalisation and the platform economy raise questions about the future taxation and social security systems “in a world of algorithm and robots” and about working time, work organization and a fair distribution of work. The trade union movement has to have a strong voice in this societal debate but it would go beyond scope in this paper.

4.2.1 Political and regulatory action

ETF level: Digitalisation is high at the European agenda with strategies (Digital Internal Market Strategy); agendas (EC Agenda on Collaborative Economy, European skills agenda), EU research programs financing research to digitize transport, fora (Digital Logistics Forum) initiating an industry dialogue on the needs and requirements to faster digitize and, finally, legislation to promote and facilitate digitalisation. All initiatives is common that little attention is given to impact on employment and on working conditions.



Here the ETF has a role to play and to influence the European institutions. For example the recent opinion of the Advocate General of the European Court of Justice on Uber (11 May 2017, C-434/15), saying that Uber is a transport company raised speculations that now the European Commission will come up with legislative proposals to facilitate platforms like Uber.

ETF aims to a European legal framework for platform / crowd workers that ensures a workers' status, social security, decent pay and working conditions, professional training and facilitates collective representation of such workers.

Affiliates' level: The same discussion on the societal questions linked to A&D and the platform economy as well as the legal frame work (e.g. data protection, liability rules with autonomous driving, or employer's responsibility of platforms) has to be addressed at national level. Coordination would be important in order to speak with one voice.

Fighting illegal forms of the platform economy, like the Uber Pop business model, has to take place at national even at local level since national legislation applies.

4.2.2 Industrial relation and social dialogue

ETF level: Aim to joint projects within all European Social Dialogue Committees to identify and anticipate more precisely the impact of A&D on the sector and on employment and to negotiate with the employers' organizations Agreements or joint recommendations on a "just transition" of A&D and other elements like:

- principles for trade union involvement and negotiations on technological changes;
- Work organisation
- Health and safety at work
- Data protection
- Skills and training

Affiliates' level: Also at national level trade unions should insist on a social dialogue at company and at sector level on new technologies and digitalisation. Unions should aim to negotiate collective agreements with employers on for example:

- Introduction of new technologies, participation and collective representation;
- Definition and conditions for alternative task/employment, re-training and qualifications;
- Health & safety at work, right to disconnect, data protection of workers (performance control);
- Working time reduction and/or (flexible) work organization.

A strong argument in particular in passenger transport is the existence of human presence safety, security and quality services that should be used by trade unions.

Where platform in transport could not be prevented it would be useful to try to organise those platform workers and negotiate collective agreements for those were possible

4.2.3 Building trade union power and building alliances

ETF level: The ETF's role is to support analysis of sector developments, company strategies and help identifying and targeting main players such as Uber, to exchange information and (good) practices and to coordinate solidarity campaigns at European level. ETF training activities should have a focus on the impact of A&D.

ETF has to be an active part in participating and/or building alliances with the civil society. There are starting points like for example data protection. An important activity is to approach youth organisations and consumer organisations to raise awareness about working conditions of platform workers.



Affiliates' level: Affiliates can support ETF in identifying main players and information exchange and have to get actively involved in campaigns targeting such main players.

Both, fighting illegal forms of transport platforms and – where not possible - developing strategies to organise platform workers strengthen union power. Also at national level alliances and awareness rising activities addressed to youth and consumers, users of platforms, are necessary.

A challenge for trade unions is to better understand young workers' views and needs as “digital natives”. Unions have to adapt trade union work to a changing society. The Conferences discussed proposals like:

- Develop strategies to counter the negative public perception of trade unions e.g. by professionally using social media to better address young people and circumvent negative media coverage for trade unions.
- Organise awareness campaigns on the role and achievements of trade unions and the importance of collective representation.

4.3 Demographic change

Meeting the challenges of demographic change requires first of all actions in economic and social policy, development policy, trade policy, asylum policy or a fair treatment of refugees. In all these areas trade unions have an opinion and a voice but it would go beyond the scope of this paper to set priorities for ETF and its affiliates here.

A priority for the ETF but even more for the national unions is to get an understanding of future labour and skills needs in their transport sectors and what to do to meet those needs. This is based on the analysis that the average age of workers in transport is very high and that within the next 10 years many workers will retire combined with the fact that transport lacks attractiveness.

4.3.1 Political and regulatory action

ETF level: For the ETF itself there are no evident points of action for influencing regulatory decisions at European level relevant in the context of demographic change and transport. Fighting deregulation and social dumping, fighting unfair treatment of migrant workers and promoting good working conditions is an ETF contribution within the policy and regulatory field at European level to improve the attractiveness of transport jobs.

Affiliates' level: A political level activity for trade unions is to get involved in a national debate on investment in training at governmental and sector level to assure a high level of education and qualification for the future.

The same is true for establishing public support for a true and fair integration of migrant workers and refugees.

4.3.2 Industrial relation and social dialogue

ETF level: The attractiveness of the different transport sectors, future skills needs and how to attract young workers and women are subjects for the European sectoral social dialogue.

Joint recommendations on diversity and integration of migrant workers and refugees in companies should also be a topic for the European social dialogue.

A joint analysis on the impact of demographic change at European level supports these activities.

Affiliates' level: It is important to understand at transport sector level and at company level the future need for workers in the sector (e.g. retirements and replacements, turn over), skills needs, recruitment plans and whether the sector/company is able to attract workers or not.

This information (preferably obtained in social dialogue) gives the opportunity to trade unions to negotiate agreements on attraction and retention measures, how to make the job attractive in particular also for young



workers and women (e.g. training, career opportunities, work-life balance, better health and safety at work, etc.). It allows as well to negotiate diversity agreements and for a better integration of migrant workers and refugees.

Industrial actions are necessary when the companies' strategy to address skills and labour shortage lies in social dumping practices.

4.3.3 Building trade union power and building alliances

ETF level: Support of affiliates through training and good practice exchange on how to attract women and young workers to trade unions.

Affiliates' level: The high retirement rate in transport in the next 10 years is a problem for transport trade unions. The average age of trade union members is in most of the European countries high and transport is a male dominated sector. Trade unions have to make every effort to attract young workers and women to become member of a trade unions.

4.4 Climate change

4.4.1 Political and regulatory action

ETF level: The ETF developed already early a 'Trade union vision on sustainable transport' with a key message that 'ecological sustainability and social sustainability are the two sides of the same coin'. Action points for the implementation of the ETF strategy on sustainable transport at EU level are

- Commission's White Paper and DG Moves regulatory activities to implement the White Paper for the different transport modes;
- EU decarbonizing mobility strategy.
- EU infrastructure policy through the TEN-T and CEF (connecting Europe facility);
- EU transport research programs;
- The Energy Union program;

ETF key points within the "avoid – shift – improve-approach" are:

- Stop further liberalization of transport modes and fighting social dumping in transport and for fair rates; too cheap transport due to social dumping promotes unsustainable transport;
- Promote public transport as a solution for healthy and safe urban areas but as well for local quality employment;
- Promote modal shift combined with fair and just transition;
- Fair treatment of all transport modes as regards taxes and charges.

Affiliates' level: The Paris climate agreement requires national implementation plans to achieve the Paris objectives. The EU level is strongly promoting the establishment of national, regional and local transport plans (e.g. SUMP – Sustainable Urban Mobility Plan). Decisions on investment in infrastructure are taken at national, regional and local level. Political decisions on promoting public transport versus individual car use and on the financing systems for public transport are taken at national and regional level. This includes as well decisions on whether or not to allow faked "ride sharing" business models as for example Uber.

These are all areas of political influence for trade unions. They have to develop a national strategy on sustainable transport, they have to inform and train their members to be capable getting involved at local level.

4.4.2 Industrial relation and social dialogue



ETF level: Sustainable transport should be a subject in each Sector Social Dialogue Committee (SSDC). Depending on the transport mode the topic of “just transition” should be part of the negotiations between ETF and the employers’ organisations.

Affiliates’ level:

In some transport sectors such as urban public transport, railways or inland waterways trade union and employers’ associations/ companies have a joint interest to promote sustainable transport and their transport modes.

In other sectors unions should get engaged in a dialogue on sector decarbonizing strategies, their possible impact on employment and how to assure a “just transition” in the sector.

At work place level negotiations of agreements regarding on the introduction of new technologies (drivers assistance systems for eco-driving, clean vehicles, ships, trains; new maintenance skills) or possible bonus schemes to promote eco-driving (if unions agree) are possible.

4.4.3 Building trade union power and building alliances

ETF level: A strategic action point for ETF is to build alliances with NGOs on sustainable transport. Building awareness among NGOs that fair and decent working conditions are part of a sustainable transport system and social dumping a means to make transport cheaper is an important point. But also ETF has to be credible in its political acting for sustainable transport.

Affiliates’ level: Also at national and local level alliances with NGOs and communities can support trade union objectives to promote public transport, fighting PPPs (private public partnerships) or public transport in public ownership.

As regards trade union power, climate change is a topic to get in touch with young workers.

5. THE WAY FORWARD

The ETF TRENDS project is a first attempt to understand the most relevant mega trends that will influence the transport sector in the future and their impact on transport workers. This paper summarizes the main findings, analyses the threats and opportunities for the transport labour market and for transport workers and makes suggestions for trade union actions at European and national level for each of the four trends: economic developments & globalisation, automation & digitalisation, demographic change and climate change. The approach to present and discuss the four trends in sub-regional conferences aimed to reach out to as many ETF affiliates as possible and to raise awareness. The discussions and suggestions found their way in this paper.

The analysis remains at the surface with this approach and considering the vast amount of information, the interlink between the different trends, the national and regional differences and the necessarily speculative character of mega trends.

Therefore it is necessary to continue the discussion within the ETF. Some trends like automation & digitalisation need deeper analysis, preferably per sector. The findings regarding the impact on transport workers have to be discussed and complemented, for example whether the right threats and opportunities have been identified. The suggested actions have to be discussed with the objective to develop a real trade unions strategy to meet the challenges effectively.



AT A GLANCE – POINTS FOR ACTION

TRENDS & CHALLENGES		POLICY & REGULATION	INDUSTRIAL RELATION & SOCIAL DIALOGUE	BUILDING TRADE UNION POWER & BUILDING ALLIANCES
ECONOMIC DEVELOPMENTS/ GLOBALISATION Challenges : Transport demand in Europe estimated to increase ; But global competition is largely based on work; Regulatory standards are being eliminated through trade agreements and deregulation; Private capital is assuming control of transport companies and infrastructure; Multinational corporations determine conditions for transport services; Unregulated business models are gaining the upper hand over regulated forms; Employees as a cost factor rather than an asset; New forms of work undermine trade union gains	ETF	Fighting EU deregulation agenda for all transport modes – for re-regulation and/or proper enforcement to ensure fair pay and quality working conditions; ETF Fair Transport Campaign: 9 legislative and non-legislative proposals; Strong involvement in alliances: For a social compact, a true pillar of social rights; Fighting new generation of trade agreements (CETA, TiSA)– for fair trade agreements and fair globalisation;	Negotiate with the employers – if possible: Social clauses in EU bi-lateral agreements (e.g. fisheries, aviation) Implementation of international social standards in EU legislation (e.g. fisheries and maritime sector) Social standards to prevent social dumping in Europe (e.g. several working time agreements)	ETF Fair Transport Campaign as a means for campaigning across Europe; Contributing to the coordination and implementation of the ITF 4 levers strategy, which is an instrument to identify targets Identifying European priority projects; Participating in European alliances with NGOs against new generation of trade agreements - for fair trade agreements and fair globalisation
	affiliates	Influence national governments on same topics, they co-decide	Negotiating collective agreements is core business of trade unions; Understanding the impact of mega trends helps to make strategic decisions	Getting actively involved in global and European campaigns; Developing national organizing campaigns in targeted companies; Building alliances at national level to support European and global campaigns



TRENDS & CHALLENGES		POLICY & REGULATION	INDUSTRIAL RELATION & SOCIAL DIALOGUE	BUILDING TRADE UNION POWER & BUILDING ALLIANCES
<p>DIGITALISATION/ AUTOMATION</p> <p>Challenges : Customers want a continuous, multi-modal door to door chain of delivery and travel ;</p> <p>New players such as Google or Amazon as transport service providers;</p> <p>Digitalisation will make jobs superfluous – new jobs and professions will be created;</p> <p>The platform economy is creating a new digital precariat;</p> <p>Use of cyber-physical systems is accompanied by subtle rationalization; automation can cause the elimination of occupations;</p> <p>The borders between private and working life are blurred; permanent control and tracking of workers and their</p>	<p>ETF</p>	<p>Influencing European institutions :</p> <ul style="list-style-type: none"> • Digital Internal Market Strategy • EC Agenda on Collaborative Economy • Digital logistics forum • EU research programs • EU training programs and skills agenda <p>Aim to a European legal framework for platform / crowd workers that ensure a workers' status, social security, decent pay and working conditions, professional training</p> <p>Address at European level the problem of how to prepare for the digitalized world regarding:</p> <ul style="list-style-type: none"> • Taxation system; • Social security systems; • Working time reduction and organization of work; 	<p>Aim to joint projects within the European social dialogue:</p> <p>Identifying A&D developments per sector;</p> <p>Aim to agreements or joint recommendations on:</p> <ul style="list-style-type: none"> • principles for trade union involvement and negotiations on technological changes • Work organisation • Health and safety at work • Data protection • Skills and training <p>Continue social dialogue with IRU to fight illegal practices of UBER</p>	<p>Identifying and targeting main players such as Uber;</p> <p>Exchange of information and (good) practices;</p> <p>organising solidarity campaigns;</p> <p>Participating and/or building alliances with civil society e.g. on data protection, liability rules</p> <p>Approach youth organisations and consumer organisations to raise awareness about working conditions of platform workers;</p>



TRENDS & CHALLENGES		POLICY & REGULATION	INDUSTRIAL RELATION & SOCIAL DIALOGUE	BUILDING TRADE UNION POWER & BUILDING ALLIANCES
<p>performance;</p> <p>New psycho-social stress and data protection challenges; Positive potential to be identified;</p> <p>3D printing might affect transport volumes and paths;</p>	<p>affiliates</p>	<p>Getting involved in a national wide discussion on how to prepare for the digitalized world:</p> <ul style="list-style-type: none"> • Taxation system; • Social security systems; • Working time and organization of work; <p>Insist on regulation for “platform economy” workers and companies:</p> <ul style="list-style-type: none"> • Worker’s status; employment contracts • Social security scheme • Wages and taxes • Insurances • Professional requirements and training 	<p>Insist on a social dialogue in the companies and at sector level on new technologies and digitalisation;</p> <p>Insist on the human presence in passenger transport for safety, security and quality services;</p> <p>Negotiating collective agreements with employers on :</p> <ul style="list-style-type: none"> • Introduction of new technologies, participation and collective representation; • Definition and conditions for alternative employment, re-training and qualifications; • Health & safety at work, right to disconnect, data protection of workers (performance control); • Working time reduction / (flexible)work organization; <p>Negotiating collective agreements for platform workers where possible</p>	<p>Getting actively involved in global and European campaigns;</p> <p>Fighting illegal forms of transport platforms;</p> <p>Developing strategies to organise platform workers;</p> <p>Getting involved in alliances and awareness raising campaigns addressed to users of platforms;</p> <p>Better understand young workers’ views and needs as “digital natives”: counter negative public perception of trade unions e.g. by using social media to better address young people;</p> <p>Organising awareness campaigns on the role and achievements of trade unions and the importance of collective representation;</p>



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<p>CLIMATE CHANGE</p> <p>Challenges :</p> <p>Global warming is a threat for mankind; transport has a responsibility; Global warming with extreme weather conditions destroys transport infrastructure; Air pollution and congestion is a threat for health and for safety of citizens and workers;</p>	<p>ETF</p>	<p>Implementing the ETF strategy on sustainable transport (e.g. on the EU decarbonizing mobility strategy); Fighting deregulation and social dumping; for fair rates, fair working conditions against a too cheap transport on the back of workers; Fair treatment of all transport modes as regards taxation and charges; Promote public transport; Promote modal shift combined with fair and just transition;</p>	<p>Using European social dialogue to jointly promote sustainable transport;</p> <p>Putting ‘fair transition’ at the agenda of the social dialogue;</p>	<p>Building alliances with NGOs for sustainable transport;</p> <p>Make NGOs aware about the impact of social dumping in transport on unsustainable transport solutions;</p>
	<p>affiliates</p>	<p>Getting involved in the definition of national implementation plans for the Paris Climate agreement; Influencing national, regional and local transport plans; Insisting on public investment in environmental friendly transport infrastructure, against Public Private Partnerships; Promote quality public transport versus individual transport solutions including faked ‘ride sharing’ business models via platforms like Uber;</p>	<p>Initiate social dialogue with (public transport) employers to promote sustainable transport;</p> <p>Negotiate collective agreements on the introduction, use of and training on clean transport technology and eco-driving;</p>	<p>Use climate change as a topic to get in touch with young workers (it’s their future);</p> <p>Build alliances with NGOs and communities to promote sustainable (city) transport, against PPPs, for publicly owned public transport</p>



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<p>DEMOGRAPHIC DEVELOPMENTS</p> <p>Challenges: Lack of personnel in some countries ; Brain drain and huge youth unemployment in other countries; Integration of migrant workers and refugees;</p> <p>Changing mobility needs and patterns</p>	ETF	<p>Considering the high average age in transport and the fact that many transport workers will retire within the next 10 years:</p> <p>Promoting in all political and regulatory decisions positions, which will improve working conditions and make transport more attractive in particular for young workers and women</p>	<p>Address with European Employers organisations the (lack of) attractiveness of employment in the transport industry, skills needs and how to attract young workers and women;</p> <p>Negotiate joint recommendations on diversity and integration of migrant workers in companies;</p>	<p>Support affiliates through training and good practice exchange on how to attract young workers and women to trade unions;</p>
	affiliates	<p>Getting involved in national debates: on investment in training at governmental and sector level to ensure education and qualification for the future; on establishing public support for a true and fair integration of migrant workers and refugees;</p>	<p>Analysing future need of workers in the sector / in the companies (retirement/recruitment strategies, skills needs);</p> <p>Addressing with employers how to attract women and young workers in the transport industry; Negotiating attraction and retention measures to improve the attractiveness of the sector; Negotiating agreements for a better integration of migrant workers and refugees;</p> <p>Industrial actions against social dumping practices to address skills shortages;</p>	<p>The high retirement rates among transport workers within the next 10 years is a problem also for trade union membership: Developing strategies to attract young workers and women to organise in trade unions is key;</p>