

Trends, challenges and opportunities in the EU transport labour market



See the full study



This study is based on a review of relevant literature and statistics as well as 18 interviews with stakeholders, carried out between July and October 2023.

Main observations

In terms of the **main trends and challenges**:

The study

assesses trends in the transport labour market and challenges and future prospects for workers. It identifies measures that can be adopted to meet these challenges and maintain the attractiveness of the sector.

- **Demographic factors** such as the relatively higher average age of workers, increasing demand for labour and lack of attractiveness of jobs for younger people and women, mean that transport companies across all modes suffer from labour shortage and have started to recruit workers from other EU countries and from third countries.
- **Increased competition** based on costs and in particular labour costs in sectors such as road transport, railways and aviation has further worsened the image of transport sectors and the

- Economic and labour market trends, such as the **evolution of new forms of mobility** have resulted in transport activities over the past decades experiencing employment growth across all modes and an expectation of future growth.

attractiveness of working conditions. It has also had a detrimental effect on regulation and improvement of working conditions through social dialogue at EU and national level and collective bargaining.

- The impact of **digitalisation and automation** is likely to increase during the next 10-15 years as disruptive technologies and processes such as automatic operation and artificial intelligence mature. This will also have a significant impact on skills needs and occupational profiles in transport.
- **Decarbonisation and expected changes in the share of different transport modes** will have a significant impact not only on future workforce requirements, but also on company investment in fleets and infrastructure. Decarbonisation and the phasing out of combustion engines in automotive will have significant effects on workforce demands and employment overall but in particular in automotive regions.

In terms of **current and future opportunities**:

- **In the road sector**, decarbonisation, electrification and further digitalisation provide opportunities to correct market failures and enhance the image and attractiveness of this transport mode by improving pay and working conditions.



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- Strong current trends in urban mobility and interconnected mobility services bring many new business and employment opportunities.
- **The future of rail transport** is aligned with the EU's policy strategy and future innovations are expected to drive further growth in the rail sector. Digitalisation and interoperability of technical standards will need a skilled workforce, requiring modern training facilities and attractive working conditions. The railway sector benefits from a strong social dialogue and collective bargaining at national and EU level.
- **The maritime sector** is undergoing significant transformation, with new greening technologies applied to ships and automation increasingly applied in terminals. The need for transversal skills is growing, but automation and digitalisation will make the profile of maritime worker more appealing and provide opportunities for gender diversity.
- **Inland waterway transport** has potential to enhance multimodal transport and improve environmental performance. However, ensuring sustainable growth requires an adequately trained workforce.
- **The aviation industry** is evolving and its modernisation is key to meeting environmental targets. Future workers will need skills in IT, data management, cybersecurity and communication to adapt to new business models.

Conclusions and policy recommendations

Policymakers should:

- look for ways of encouraging and strengthening the prioritisation of quality in terms of working conditions and working environment. This could take the form of engaging with the social partners.
- support developing more ambitious approaches on skills and qualifications, in the light of the influence of automation and digitalisation.
- consider putting into place a framework that encourages active support for job seekers, with a particular focus on vulnerable groups.
- consider more intersectoral coordination, exchange and cooperation between sectoral social dialogues in the different transport modes.
- introduce greater regulation of emerging mobility and logistics services and platforms.
- ensure more effective implementation of existing social rules and there should be better regulation of atypical forms of work.
- consider the creation of a chamber system in transport to foster joint working between business and worker representative organisations.



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