European Foundation for the Improvement of Living and Working Conditions

Employment, industrial relations and working conditions in the European rail transport sector

european Monitoring Centre on Change

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Introduction

For over a decade, the European rail transport sector has undergone extensive structural change. The initial impetus for this restructuring process was European Directive 91/440/EC. This directive aimed at improving efficiency and competitiveness in the rail transport sector by introducing a more market-oriented regulatory framework. Since then, the European Commission's adoption of the first and second rail infrastructure package directives, in 2001 and 2002 respectively, has aimed at further opening up market access and building a more integrated European railway market. The third railway package, which is currently being discussed by the European Parliament, will continue this trend.

In spite of a common European framework, railway markets in the EU Member States have developed at different paces, largely due to diversity among the individual countries in implementing the various directives. Despite these differences, the process of liberalising the railway industry has increased market pressures in all countries and has influenced the quantity and quality of employment in the European rail sector as a whole.

The regulatory framework in the rail transport sector, set down by the European Commission, has triggered extensive structural changes, which will continue or even accelerate in the future. Key changes that have already taken place in the sector include the break-up of the former state-owned, quasi monopolies into different companies, in the former EU15 countries and in many of the new Member States. This has led to the separation of passenger and freight transport service provision from infrastructure management. It has also resulted in a greater focus on core activities, with outsourcing of non-core activities either through the creation of independent companies still under the state control, or usually through outsourcing of smaller activities to private sector companies. In parallel, these newly created companies have been transformed into joint-stock companies with mixed ownership structures, even though control has remained with the state in most cases. Another key development has been the opening up of markets to new entrants. While some of these new players have been restricted to regional activities, a few European-wide players have emerged serving national and regional markets in several Member States.

As a result of these developments, the rail transport sector has become much more heterogeneous in all Member States. The impact of these developments on employment levels and on working conditions in the sector has been substantial. For one, extensive restructuring and the focus on higher productivity and profitability has led to massive reductions in the workforce. Greater diversification of working conditions has also resulted, with conditions offered by new entrants differing quite substantially from those prevailing in the state-controlled companies. Nevertheless, there are also examples where reform of the railway sector has led, for the first time, to sector-wide agreements at national level, providing a framework that can prevent stark differences between companies. Emphasis on higher degrees of flexibility with regard to working time and work organisation has also been a notable result, as the state-controlled companies respond to and prepare for new competitive needs.

Moreover, the increasing number of players in the market has led to greater competition for skilled workers and specialists. In fact, providing a sufficient number of people with the right skills could become a problem in the future, since the number of apprenticeships in the state-owned companies has declined and new entrants are often weak in the area of training. However, reliable information on the issue is difficult to find.

This consolidated report provides an overview of employment, industrial relations and working conditions in the European rail transport sector, based on three different sources. It begins with a chapter on employment levels, which presents Eurostat data as well as data collected from company reports, and information provided by industry associations, trade unions and consultancies. It should, however, be noted that as information on working conditions in the railway sector, particularly regarding quantitative information and employment statistics, has not kept up with changes in the sector, discrepancies exist not only between aggregate European sectoral data and other sources, but also between these sources.

Since the evolution of working conditions is largely dependent on industrial relations in the sector, the second part of the report examines the situation concerning industrial relations in rail transport in the EU25 and Norway, as well as in the acceding countries, Bulgaria and Romania. It is based on national reports from correspondents of the European Industrial Relations Observatory (EIRO). These reports as well as a comparative overview are available on the EIRO website at **http://www.eiro.eurofound.eu.int/thematicfeature13.html**.

Finally, the third part of the report provides a summary of profiles of employment levels and working conditions in the rail transport sector in five countries: Germany, Italy, the Netherlands, Sweden and the UK. The findings are based on a study by SCI Verkehr in Germany, which was commissioned by the Foundation in June 2005.

Employment levels in rail transport

The number of people directly employed by railway operators is accounted for in official Eurostat statistics and in the national figures for each country (NACE Code 60.10). Two problems arise, however, in relation to this information. First, the data available at European level are incomplete and do not provide statistics on rail transport for all Member States. Second, these figures do not illustrate the development of employment in railway services accurately, taking into account the extensive restructuring of the sector, which has led to a more heterogeneous market structure, in which large rail companies have created separate divisions for different types of services and/or outsourced services to companies active in other sectors. Another discrepancy that is apparent is between data from official statistical offices and those provided by the operating companies themselves and by other sources close to the company level, like industry associations. This makes it difficult to attain a clear and unambiguous picture of the development of employment in the past and of current employment levels.

The following table provides an overview of available data concerning employment levels in the sector.

Table 1: *Employment in rail transport in selected European countries (NACE 60.10), 2004*

Country	**Total no. employed**
Austria	28,000
Croatia	15,000
Czech Republic	80,000
Estonia	2,000
Finland	7,000
France	185,000
Germany	190,000
Hungary	57,000
Italy	114,000
Lithuania	14,000
Luxembourg	3,000
Netherlands	18,000
Poland	161,000
Portugal	11,000
Romania	103,000
Slovakia	43,000
Spain	50,000
Switzerland	35,000
Total	**1,116,000**

Source: *Eurostat, 2004*

The table on p.4 presents an overview of employment in the main operating companies, based on reports from the national correspondents of the European Industrial Relations Observatory (EIRO) and on research by SCI Verkehr Gmbh for Germany, Italy, the Netherlands, Sweden and the UK. Full profiles of the rail transport sector in these countries are available separately on the **EMCC portal**. The **national reports**[1] on industrial relations in the railway sector have also been published on EIROonline.

[1] **http://www.eiro.eurofound.eu.int/thematicfeature13.html**

Table 2: *Employment in the main operators*

Country	Incumbent	Notes	Entrants
Austria	Austrian Federal Railways (Österreichische Bundesbahnen, ÖBB) 2004: 47,123 employees	Declined from 71,001 employees in 1975 to 47,123 employees in 2004	Cargo Service GmbH (CargoServ) 2003: 220 employees Stern & Hafferl Verkehrsgesellschaft m.b. H 2003: 250 employees Niederösterreichische Verkehrsorganisationsgesellschaft m.b. H (NÖVOG) 2003: 10 employees Internationale Shlafwagengesellschaft (ISTG) 2003: 150 employees Eisenbahn-Hochleistungs AG (HL - AG) 2003: 140 employees
Belgium	Belgian National Railways (Société Nationale des Chemins de Fer Belges/Nationale Maatschappij der Belgische Spoorwegen, SNCB/NMBS) 2005: 39,132 employees	Declined from 41,384 employees in 2000 to 39,132 employees in 2005	D&L Cargo (freight transport) 2002: 35 employees
Czech Republic	Czech Railways (České Dráhy, a.s., ČD) 2003: 78,575 employees	Declined from 86,379 employees in 2000 to 78,575 employees in 2003	–
Denmark	De Danske Statsbaner (DS B) 2004: 8,736 employees	Total employment declined from 10,104 employees in 2000 to 8,091 employees in 2004 (Aggregate level data from Statistics Denmark)	Railion Denmark 2004: 520 employees VIA Travel 2004: 270 employees Arriva Tog 2004: 356 employees
Estonia	Estonian Railways (AS Eesti Raudtee) 2003: 3,913 employees	Declined from 6,448 employees in 2000 to 3,913 employees in 2003	–
Finland	Finnish State Railways, VR Group Ltd Currently: 13,700 employees VR Ltd: 8,113 employees VR-Track-Ltd: 2,358 employees Corenet Ltd: 210 employees	In 2000, there were 8,700 employed in this sector and by 2004, this number declined to 7,100 employees. (Aggregate level data from Statistics Finland)	–

Table 2: *Employment in the main operators (cont'd)*

Country	Incumbent	Notes	Entrants
France	French National Railways (Société Nationale des Chemins de Fer Français, SNCF) 2000: 176,000 employees	French National Railways' workforce decreased by 33.5% between 1976 and 2000. Staffing levels are projected to drop below the 170,000 mark by the end of 2005.	–
Germany	Deutsche Bahn AG (DB AG) 2004: 225,512 employees	Declined from 306,241 employees in 1996 to 225,512 employees in 2004	Non-DB owned railways 2003: 10,759 employees
Greece	Hellenic Railways Organisation (OSE) 2003: 8,797 employees	Declined from 13,324 employees in 1990 to 8,797 employees in 2003. The new OSE business plan for 2005–2007 provides for gradually reducing staff to 7,250 employees by the end of 2007. Specifically, the trade union confederation, the Pan Hellenic Federation of Railway Workers (POS) states that staff levels will evolve as follows: 8,500 in 2004; 8,325 in 2005; 7,850 in 2006; and 7,250 in 2007.	–
Hungary	Hungarian State Railways Company (Magyar Államvasutak Rt, MÁV) Currently: 52,000 employees	Declined from 58,000 employees in 2000 to 52,000 employees at present	–
Ireland	Irish Rail (Íarnród Éireann) March 2005: 5,500 employees	Increased from 5,200 employees in 2000 to 5,500 employees in 2005	–
Italy	Trenitalia Spa 2004: 56,000 employees	Total employment in the railway sector declined from 120,367 employees in 1998 to 102,000 employees in 2004.	–
Latvia	Latvian Railways (VAS Latvijas Dzelzceļš, LDz) January 2005: 20,300 employees	Declined from 20,800 employees in 2003 to 20,300 employees in 2005	–
Lithuania	Lithuanian Railways (Lietuvos Geležinkeliai, LG) 2004: 11,525 employees	Declined from 13,675 employees in 2001 to 11,525 employees in 20 04	–
Luxembourg	Luxembourg National Railway Company (Société Nationale des Chemins de Fers Luxembourgeois, SNCFL) December 2004: 3,200 employees	Declined from 3,150 employees in 1996 to 3,331 employees in 1999, and then increased to 3,200 employees in 2004	–
Netherlands	Dutch Railways (Nederlandse Spoorwegen , NS) 2004: 25,491 employees	Declined from 24,729 employees in 2000 to 24,255 employees in 2001, and then increased to 25,491 employees in 2004	–

Table 2: *Employment in the main operators (cont'd)*

Country	Incumbent	Notes	Entrants
Poland	Polish National Railways (Polskie Koleje Państwowe, PKP) 2004: 138,000 employees	Declined from 170,000 employees in 2000 to 138,000 employees in 2004	–
Portugal	Comboios de Portugal (CP) 2001: 15,727 employees	–	–
Slovakia	Železničná Spoločnosť', ŽSSK January 2005: Around 13,000 employees (passenger transport, ZSSK)	Total employment declined from 46,713 employees in 2000 to 38,000 employees (passenger transport (ZSSK), freight transport (ZSSK Cargo) & infrastructure maintenance (ZSR)) in January 2005.	–
Slovenia	Slovenian Railways Holding Company (Holding Slovenske Zeleznice, HSZ) May 2005: 8,045 employees	Declined from 9,023 employees in 2001 to 8,045 employees in 2005	–
Spain	Red Nacional de Ferrocarriles Españoles (RENFE) RENFE Operadora 2005: 16,000 employees Railway Infrastructure Administration 2005: 9,000 employees	Total employment in railways declined from 73,000 employees in 1985 to 42,000 employees in 2001.	–
Sweden	SJ AB 2004: 3,273 employees	Declined from 3,524 employees in 2001 to 3,273 employees in 2004	Private railways companies employ around 9,000 people.
UK	–	All operating companies are new entrants since privatisation in 1996.	Arriva Plc 2004: 30,000 employees First Group Plc 2004: 67,000 employees National Express Group 2004: 41,222 employees English, Welsh & Scottish Railway 2004: 5,800 employees

Source: *EIRO and SCI Verkehr Gmbh, 2005*

Key aspects of industrial relations

In 2000, the European Industrial Relations Observatory (EIRO) published a comparative study on industrial relations in the railway sector in the then 15 Member States (and Norway). Since that time, huge transformations have taken place at the 'micro' level of the incumbent railway companies, where restructuring has been extensive. However, viewed as a whole, the picture remains largely unchanged, due to the fact that changes at the 'macro' level of the market structure have really only emerged in recent years. A similar gap also exists between institutional arrangements and actual developments in relation to the liberalisation of the railway sector.

In the field of industrial relations, there has been much continuity in the areas of representation and collective bargaining structures. However, it must be underlined that collective bargaining has widely contributed to changes at enterprise level within the sector and, therefore, has been an essential element of transformation. While this has often involved a rise in conflict levels, collective relations have remained intact. Indeed, they have helped to find shared solutions for making the difficult shift from highly regulated and publicly financed operations to self-sustaining railway companies, which are open to much greater competition.

The current representation and collective bargaining structures seem to be still in a period of transition, changing as the reform process progresses. Thus, a proper assessment of the impact of reforms on industrial relations in the railway sector will not be possible until the market structure stabilises. For the time being, however, it would seem that industrial relations have largely been able to cope with the challenges arising out of reform and restructuring of the railway sector.

Institutional reform

Arising from the range of EU initiatives, Member States have reformed their domestic legislative framework and implemented significant changes in relation to the structure and organisation of national railways. This has led, in particular, to the separation of service provision and infrastructure management in the vast majority of EU Member States. Moreover, the necessary formal steps to open up the freight transport market, according to the deadlines set by the liberalisation process, have been taken in many countries.

In spite of these changes, however, formal obstacles to competition remain particularly high in certain countries where the monopoly position of the incumbent railway company remains substantially unchallenged. It is interesting to note that this situation relates not only to countries that have somehow been temporarily excluded from the provisions of the railway reform process (Greece and Ireland, in particular, largely because of their isolation from the European railway network), or the new Member States (Latvia, Lithuania and Slovenia) and acceding countries (Bulgaria); it also pertains to some of the former EU15 countries that have a rather advanced institutional regulatory framework in the railway sector, such as Finland, Portugal and Spain.

The continuing monopoly of the incumbent railway companies pertains not only to the legislative framework in some countries but also to domestic traffic, where the incumbents maintain a largely dominant position.

Typically, the former incumbent is a state-owned commercial company, which heads a group structure where all former activities of the national railway company have been reallocated through a process of 'subsidiarisation', i.e. the creation of a number of subsidiaries for the different activities formerly carried out by the single organisation. This structure usually features the separation of service provision and infrastructure management, often achieved through the establishment of separate entities for real estate management, travel services, financial services and so on. These developments can be highly complex and there are instances of railway holding companies with more than 100 subsidiaries, as in the case of the French National Railways (Société Nationale des Chemins de Fer Français, SNCF).

Even if the overall situation suggests that incumbent companies have maintained a significant national monopoly, there are signs nevertheless that European policies of market liberalisation have generated a change within the European railway sector and have influenced the strategies of different national actors.

Impact of restructuring

The issue of restructuring and reorganisation has remained at the heart of industrial relations in the railway sector and has sometimes led to conflict in this area. In certain countries, like France, the liberalisation process as well as employment reductions have attracted strong criticism from the unions. The shedding of jobs in the railway sector, which essentially relates to the incumbent railway companies, was a prominent feature of developments in the early 2000s. Between 2000 and 2004, for example, employment reduction in the railway sector of the 26 countries (the EU25, Norway, Romania and Bulgaria) covered in the EIRO study amounted to an average of almost 15% of overall employment (or about 150,000 jobs).

The prominence of and sensitivity surrounding restructuring in the railway sector is particularly high, since railway companies are usually among the largest employers in each country. Nevertheless, efforts to reduce the social impact of redundancies have been quite remarkable in this sector, and redundancies have been managed through the combination of different ‘soft’ measures. Such measures include the blocking of recruitment, i.e. the use of natural turnover, and voluntary resignations with economic incentives, or different forms of early retirement, sometimes financed through specific funds, as was the case in countries such as Belgium, the Czech Republic and Spain. For instance, between 1998 and 2004, more than 11,000 railway workers (or some 12% of the initial employment) in Czech Railways (České Dráhy, a.s., ČD) availed of economic incentives for voluntary redundancy, which were funded by the government through a specific social programme that accompanied the railway sector reform process.

In certain circumstances, reorganisation can also proceed more or less unilaterally. For instance, following its accession to the EU in 2003, the Hungarian government prepared a restructuring plan for the Hungarian State Railways Company (Magyar Államvasutak Rt, MÁV), which envisaged some 11,000 redundancies from a staff of slightly over 50,000 employees and the privatisation of railway routes, with the total length of routes served by MÁV possibly diminishing from 7,600 km to 3,500 km. Despite union opposition to such a plan, the government approved the plan in late 2003.

Another feature of internal reorganisation and cost-cutting measures is the outsourcing of some activities, which were formerly performed directly by the railway undertaking. As already noted, one way of implementing this strategy was through the establishment of subsidiaries responsible for ancillary services, which were sold or developed into joint ventures (e.g. travel agency activities of the Norwegian NSB and the Danish DSB). Cleaning services and maintenance have often been contracted out.

Employment regulation

The issue of employment regulation is closely connected to the legal status of the employer and to measures taken to preserve employment protections that might have been granted in the past. While at present, the large majority of railway undertakings are by commercial firms under private law, in which railway workers have the status of private sector employees, there are two main exceptions: these derive from the former common inclusion of railway companies in the public administration area, usually under the authority of the Ministry of Transport.

The first exception relates to those national railways that still, more or less, belong to the public sector, as they have a particular status that is recognised by law, and because they are controlled by the government. Employees in these companies are entitled to certain protections, including more favourable social security schemes in relation to illness, invalidity and pensions. The second exception relates to the companies that still employ a large number of civil servants as a consequence of their legal status prior to the reform, and to help manage the shift of railway companies from the public domain to the private domain. The first group includes the Belgian SNCB-NMBS, the Danish DSB, the French SNCF, the Hellenic Railways Organisation (OSE) and Luxembourg's SNCFL. The second group includes the Austrian Federal Railways (Österreichische Bundesbahnen, ÖBB), the German DB AG and the Norwegian State Railways (Norges Statsbaner, NSB AS).

It should be mentioned that the different scenarios outlined essentially apply to railway undertakings relating to service provision, i.e. the railway operators. Where sector reform leads to the legal separation of service provision, infrastructure management and regulatory (and inspection) tasks, then the bodies responsible for infrastructure and regulation may retain their public status and employees can remain, or even become, civil servants.

Key actors in industrial relations

Employer organisations

The continuing predominance of incumbents is reflected in two main features: on the one hand, the presence of employer organisations in the railway sector is not always common, while on the other hand, collective bargaining is mainly carried out at company level. Some railway companies are direct members of employer confederations (Estonia, Latvia, the Netherlands, Norway, Romania and Slovenia), while in a limited number of cases, the creation of sectoral organisations is linked to specific objectives, such as the establishment of sectoral social dialogue (Poland) or the definition of an industry-wide agreement, with a view to sustaining the reform and liberalisation of the railway sector (Italy).

However, the associational representation domain often remains substantially confined, at least for the time being, to the incumbents. This is the case, for example, in both Poland and Italy, where they have the Association of Railway Employers (Związek Pracodawców Kolejowych, ZPK) and the Confederal Agency of Transport and Services (Agenzia Confederale dei Trasporti e dei Servizi, Agens), respectively. Also, in Germany, the Employers' Association of Mobility and Transport Service Providers (Arbeitgeberverband der Mobilitäts- und Verkehrsdienstleister, Agv MoVe) represents the companies belonging to the DB AG group.

Despite the predominance of company-level industrial relations, multi-employer representation is present in a number of countries. In Austria, for example, the Federal Organisation of Rail Transport (Fachverband der Schienenbahnen), which is part of the General Federal Organisation of Transport (Allgemeiner Fachverband des Verkehrs, AFV) under the umbrella of the Chamber of the Economy (Wirtschaftskammer Österreich, WKÖ), gained collective bargaining representation following the railway reform. This shift in responsibility was sanctioned by the 2004 collective agreement.

In some situations, employer representation is fragmented along the private-public divide, or due to the aforementioned presence of organisations that mainly represent the incumbent and its subsidiaries. Such fragmentation of associational representation on the employer side exists in Denmark, where the State Employer Authority (Personalestyrelsen) bargains for civil servants at DSB, while regional railways are represented by the Danish Regions (Amtsrådsforeningen, ARF) and other companies are members of the Employers' Association of Railways in Denmark (Jernbanernes Arbejdsgiverforening, JA). It also exists in Germany, where non-state railways are members of the employer organisation of German railway companies (Arbeitgeberverband Deutscher Eisenbahnen, AGVDE) or bargain independently, whereas DB AG is represented by Agv MoVe.

Trade unions

Trade union representation has generally retained one of its typical features in the railway sector, namely, the presence of numerous organisations, often characterised by reference to specific professional groups, such as engine drivers and station masters. For instance, in Poland, there are as many as 28 union organisations in the railway sector, including some company unions; in Italy, there are 12 unions, in Slovakia, 10 unions and in France and Slovenia, nine unions.

In some circumstances, the restructuring process and conflicts that have arisen from it have resulted in the emergence of new trade unions, often focused on the protection and promotion of the interests of certain groups of workers. In Italy, this occurred as early as the mid-1980s with the establishment of the Independent Engine Drivers' Union (Comitato Macchinisti Unitari, Comu), and in Ireland in the mid-1990s at Irish Rail, where the Irish Locomotive Drivers' Association (ILDA) was established arising from dissatisfaction with the 1994 Irish Rail productivity deal. However, Irish Rail does not formally recognise ILDA.

One notable exception in relation to the typical fragmentation of trade union representation is Austria, where there is a single union for all railway workers, i.e. the Union of Railway Workers (Gewerkschaft der Eisenbahner, GdE). GdE organises employees of all railway companies, including apprentices and pensioners. In other countries, a number of trade union organisations have joined sectoral federations, thereby reducing extreme fragmentation. In Greece, for example, some 20 unions, including local, professional and company organisations, together form the Pan Hellenic Federation of Railway Workers (POS).

Another source of fragmented representation relates to the presence of both private and public sector employees in the same sector and, in certain circumstances, in the same company. Yet, even here there are examples of cooperation between unions aimed at reducing the complexity of negotiations and avoiding a weakening of the trade union side. For example, in Germany, at DB AG, the unions Transnet Gewerkschaft GdED (Transnet) and Verkehrsgewerkschaft GDBA (GDBA) formed a joint bargaining association, while the German Engine Drivers' Union (Gewerkschaft Deutscher Lokführer, GDL) has sometimes insisted on holding parallel but separate negotiations.

In all countries, union density is very high. For example, in Ireland, union density reaches nearly 100%. In countries such as Austria, Belgium, Finland, Greece, Poland, Portugal and Slovenia, density is around 90%, and is generally well above the national average.

Table 3: Union density

Country	Union density	Country	Union density
Austria	Almost 100%	Latvia	About 80%
Belgium	Around 90%	Lithuania	45%
Bulgaria	75%	Luxembourg	95%
Czech Republic	65%	Netherlands	65%–70%
Denmark	High	Norway	High
Estonia	45%	Poland	95%
Finland	Above 90%	Portugal	90%
France	30%	Romania	60%
Germany	High	Slovakia	70%
Greece	Above 90%	Slovenia	90%
Hungary	Around 50%	Spain	90% at RENFE
Ireland	100%	Sweden	High
Italy	Above 85%	UK	High

Source: *EIRO, 2005*

Collective bargaining

The prevalence of company-level bargaining and government-owned railway firms, sometimes with a special public status, alongside the aforementioned fragmentation of collective employer representation, has resulted in a complex picture in relation to collective bargaining. However, given the dominant position of former incumbents with already established company-level industrial relations systems, it can be said that collective bargaining coverage is very high and close to 100%. Collective agreements signed by the incumbents are crucial for the whole sector because they tend to act as 'pace setters' for bargaining rounds involving other railway operators, where they exist and if they bargain, something which is not always clear from the national reports, as they focus mainly on industrial relations in the dominant companies.

Despite the crucial role of company-level bargaining, multi-employer bargaining is sometimes present to a limited extent. For example, there are multi-employer agreements in Austria, Denmark, Germany and Italy, although these agreements do not cover the main railway firms, but only the other residual operators.

Multi-employer bargaining covering the entire railway sector seems to be present only in Poland and Sweden. In Poland, for example, a multi-employer collective agreement was signed in late 2002 by the Association of Railway Employers and by the trade unions to which members of the association are affiliated (mostly to the PKP group). Other instances of multi-employer bargaining, on a broader basis, can be found in Norway (where it concerns central agreements over wage terms) and Romania (transport).

Company-level bargaining in the incumbents usually amounts to national bargaining and therefore can involve different degrees of centralisation. Moreover, given the group structure that many railway firms have taken, company-level bargaining is often composed of group framework agreements and supplementary agreements signed at subsidiary or even plant level. An example of centralised company-level bargaining can be found in Belgium, where the National Joint Committee of SNCB plays a key role in employment regulation.

More decentralised bargaining can be found in Germany, where a framework collective agreement is negotiated at the holding level, which is then supplemented by regional and company-level agreements that apply to only certain parts of the DB AG group. In the UK, a highly decentralised structure exists, where single company agreements prevail, even when different railway companies belong to the same group.

Although company-level bargaining appears to be the standard, some attempts have been made to introduce industry-wide agreements. Unions are mainly in favour of this solution. One example is the new railway sector agreement, signed in Italy in 2003. So far, this agreement applies only to the Italian State Railways; nevertheless, the objective of the signatories is to gradually extend its coverage as reform and liberalisation within the sector progresses.

Tripartite talks within the railway sector have taken place in the different countries, particularly those in central and eastern Europe. In Poland, for example, a special tripartite body, the Tripartite Sectoral Team for Railways, was set up in autumn 2003, with a view to addressing the criticisms voiced by the workers over the reorganisation plan of PKP, which envisages the closure of local routes. Although the tripartite talks were effective in scaling down the tensions and in avoiding specific strike actions, no common understanding on the major issues at the centre of the conflict could be reached.

Table 4: *Collective bargaining structure*

Country	Collective bargaining
Austria	Company-level agreements at ÖBB and at other railway firms; railway sector agreement for private rail companies
Belgium	Company-level agreements (negotiated in the SNCB-NMBS National Joint Committee)
Bulgaria	Company-level agreements
Czech Republic	Company-level agreements
Denmark	Public sector agreement (DSB); local authorities agreement (local railways); railway sector agreement (firms associated to JA/HTS); and supplementary company and plant-level agreements
Estonia	Company-level agreements
Finland	Company-level agreements
France	Company-level agreements
Germany	Company-level agreements at DB AG (negotiated by the employer organisation, Agv MoVe) and at other rail operators; railway sector agreement (non-government railways affiliated to AGVDE)
Greece	Company-level agreements
Hungary	Company-level agreements
Ireland	National wage agreements and company-level agreements
Italy	Railway sector (FS group) and local public transport (local railways) agreements, plus supplementary company-level agreements
Latvia	Railway sector agreement and supplementary company-level agreements
Lithuania	Company-level agreements
Luxembourg	Public sector agreement
Netherlands	Company-level agreements
Norway	Central agreement on general pay increases and company-level agreements
Poland	Railway sector agreement and supplementary company-level agreements
Portugal	Company-level agreements
Romania	Transport sector agreement and supplementary company-level agreements
Slovakia	Company-level agreements
Slovenia	Railway sector agreement (only HSZ)
Spain	Company-level agreements
Sweden	Railway sector agreement and supplementary company-level agreements
UK	Company-level agreements

Source: *EIRO, 2005*

Industrial conflict

It is possible to distinguish between two groups of countries with opposite trends in relation to industrial conflict in recent years. The first group has shown high and, sometimes even increasing levels of conflict, which arose mainly out of the railway reform process. The second group has experienced a more or less prolonged period of decreasing, or even absence of, industrial action. Austria, Estonia, France, Ireland, Italy, the Netherlands, Poland, Portugal and Spain belong to the first group. In all of these countries, the reform of the railway sector, namely the reorganisation of incumbent railway companies, was at the centre of the conflict in recent years.

In Austria, for example, opposition to the reform process, and notably to the subdivision of ÖBB, led to the most significant wave of conflict since World War II, after a long period of virtually no disputes. Industrial action commenced in autumn 2002 and continued in 2003, during which a 66-hour strike took place in November 2003. In France, strikes are common in the railway sector: in recent years, almost a quarter of all days lost in France were due to conflicts in the railway sector.

In relation to the countries in which conflict is relatively low, a number of reasons can be attributed to this. Firstly, the institutional framework exerts a decisive impact. For example, in Denmark and Germany, the exclusion of civil servants from the right to strike has played a significant role, although in Denmark, there were some strike actions at Metro and Arriva, where employees are not civil servants. Moreover, peace obligations and effective mediation procedures have been crucial in reducing conflict, as seen in Denmark, Finland, Germany, Norway and Slovakia. Rules that directly constrain strike activity may also be relevant. For instance, in Bulgaria, strict rules apply to strikes in the railway sector, where 50% of service must be maintained at all times. Therefore, industrial action is very rare, while collective disputes are more common where conflict does arise. It should also be noted that even in countries where the level of conflict is high, there are usually guaranteed minimum service levels, cooling-off provisions and dispute resolution procedures, as seen in France, Italy and Portugal. Ultimately, it is the effectiveness of such rules that plays a key role.

Apart from institutional factors, the overall climate of industrial relations and social dialogue can contribute to reducing conflict, for example, by increasing the effectiveness of dispute resolution tools. In Belgium, for instance, social dialogue appears to be effective. Despite strong criticism by unions of the reorganisation plan presented by top management at SNCB-NMBS in 2003, actual conflict has been quite rare and only two days have been lost due to strike action since 2000. Social partners in the National Joint Committee have agreed to a 10-day notice period before any industrial action can be taken – a requirement that is likely to have promoted dialogue over antagonism.

As seen in Italy, Spain and Sweden, the fragmentation of representation and the presence of autonomous, sometimes particularistic, unions may have contributed to increased conflict levels in the railway sector. In Sweden, the limited conflict that was recorded in recent years was mainly linked to the demands of an independent engine drivers' union, the Swedish Engine Drivers' Union (Svensk Lokförarförening, SLFF), which has requested a separate agreement and called some strikes to back its demands. However, the Almega employer organisation has so far refused to bargain separately with the union and has confirmed the application of the sectoral agreement (SE0311102N, SE0111102N).

Reactions towards the liberalisation process

Trade unions and employer organisations generally regard the liberalisation of European railways as an established trend and as an essential element of the environment in which they have to develop and implement their respective strategies. They also agree on the importance of working towards the development of railways in both freight and passenger transport. Much more varied opinions exist, however, in relation to ways of achieving this goal.

Some union organisations are very critical of liberalisation and privatisation of railways. More generally, the unions believe that railway reform should preserve the existing work protection levels and that any harmonisation of work regulations should be realised through the extension of the highest protection standards currently granted to railway workers, with a view to avoiding 'social dumping'. Within each country, trade unions have often criticised the reorganisation processes, which are frequently attributed to EU-level policies.

The employers share the view that the opening up of the railway market to increased competition must be based on fair conditions and reciprocity. Like the unions, they underline the importance of safety standards and quality of service and have expressed some concerns that liberalisation might prove detrimental to these priority objectives.

European social dialogue in the railway sector is usually appreciated as a means of contributing to the integration of European railways. In this respect, the agreement between the Community of European Railways (CER) and the European Transport Workers' Federation (ETF), on certain aspects of the working conditions of mobile workers assigned to interoperable cross-border services, is regarded as a positive example. In general, social and tripartite dialogue is considered an important element for building consensus around reform processes.

Profile of the sector in five EU Member States

The five countries highlighted in this report – Germany, Italy, the Netherlands, Sweden and the United Kingdom – represent the most important railway markets in the EU (along with France and Spain). All of these countries have made substantial progress in relation to the liberalisation of the rail transport sector and restructuring of their former state monopolies. Nevertheless, the different approach that each country has taken in this respect has led to varying results, particularly with regard to the number of players, the position of the former state monopolies, employment levels and working conditions.

In order to explore, in greater detail, the development of employment levels and working conditions in the railway services sector in these five countries, the Foundation commissioned a study from SCI Verkehr, Germany in June 2005. The executive summaries of these five country profiles are outlined below; the full country profiles have been published separately on the **EMCC portal**.[2]

The country profiles focus specifically on the European standard gauge railway operator market, which comprises short and long-distance passenger, as well as freight, transport services. For each country, overall development and market trends in the sector, as well as structure and performance of the main companies, are analysed.

One of the key aspects covered is the extent of outsourcing of activities in the rail transport sector in each of these countries. Estimates on the level of outsourcing are provided for the five countries examined. The calculations are based on the decline of added gross-value in railway operations (NACE 60.10) and also on the increase in purchases of intermediate services within the sector, which have, in turn, led to a rise in employment in other sectors. The development of the ratio of value added and the purchase of intermediate services over time gives an indication of outsourcing activities. A detailed description of the methodology used is annexed to each of the country profiles, which have been published separately.

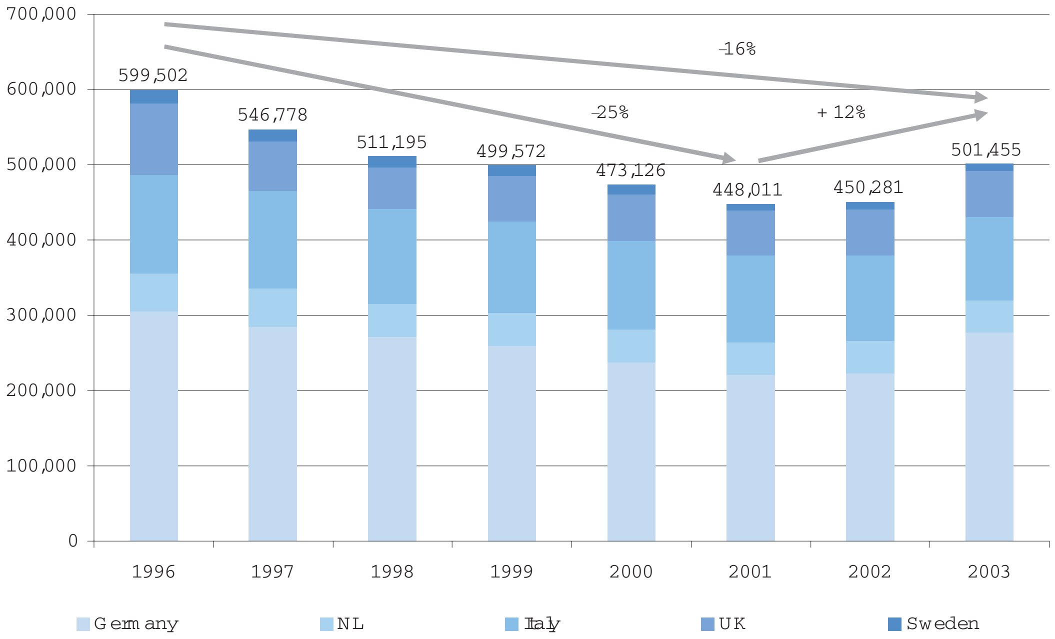
As far as possible, the country profiles also provide information on working conditions for the sector and at company level, covering training and learning opportunities, workplace conditions, working time, income levels, health and safety and social protection. This information is based on publicly available sources as well as on interviews with key actors.

Main findings

From 1996 to 2003, total employment in the rail transport sector, in the five countries analysed, declined from almost 600,000 jobs to around 500,000 jobs, the equivalent of a decrease of about 16%. The German situation, and changes that have occurred in its employment levels, is particularly significant in the context of the total European employment. This is true, for example, in relation to the acquisition of the Schenker/Stinnes group by DB AG. A considerable proportion of increased employment levels in 2002 can be attributed to this acquisition, although this increase is not totally related to the rail transport sector. Thus, a higher decline in employment could be observed overall in the sector.

[2] **http://www.emcc.eurofound.eu.int/content/source/eu06011a.html**

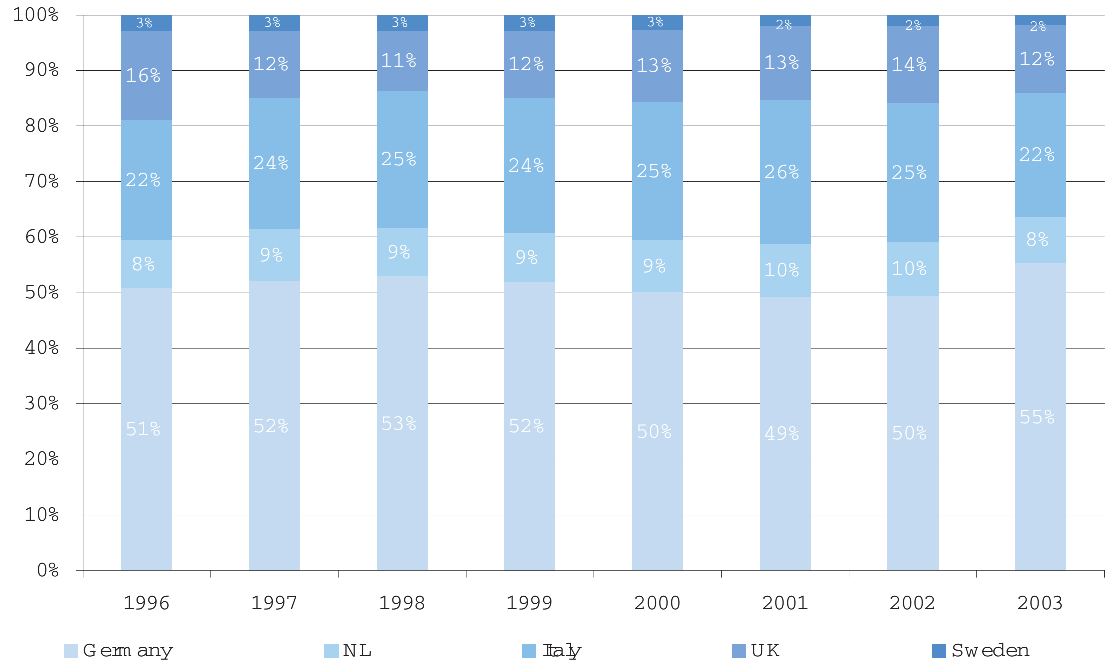
Figure 1: *Employment in the rail transport sector, 1996–2003*



Source: *SCI Verkehr GmbH, 2005*

The German share of total employment in the railway sector is the largest among the five countries, accounting for over 50% of the sector's employment. This is followed by Italy (20%), the UK (over 10%), the Netherlands (almost 10%), and lastly, Sweden (less than 5%).

Figure 2: *National employment shares in the rail transport sector, 1996–2003*

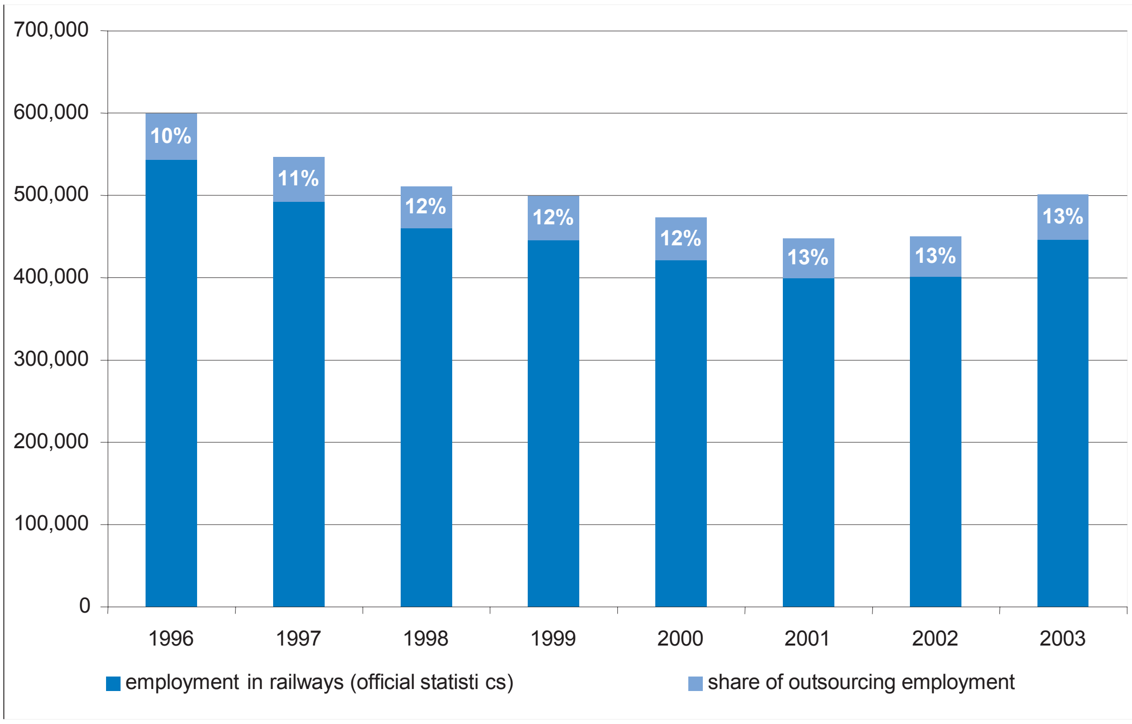


Source: *SCI Verkehr GmbH, 2005*

The German and Italian rail transport markets are still particularly dependent on the structures and strategies of the state-owned railway companies. In relation to their share of the market and of employment, for example, DB AG and Trenitalia (following FS) still maintain a central position. The situation is different, however, in the Netherlands, the UK and Sweden, where strong competition already exists between the different railway operators. One result of this increased competition is a change in the allocation of jobs and further development of working conditions in these countries, a factor which highlights the importance and continued growth of new competitors alongside the state-owned railway companies.

Liberalisation and privatisation of the railway sector in the five countries analysed has also influenced the structures of the value chains within the sector. In total, a share of over 10% of total employment in the rail transport sector is affected by outsourcing.

Figure 3: *Outsourcing employment in the rail transport sector, 1996–2003*



Source: *SCI Verkehr GmbH, 2005*

Only the rail transport markets were taken into account. A total assessment of employment has yet to consider the full added-value of the railway sector, taking into account the small and medium-sized enterprises as well global players in the railway industry, transport operators and services providers.

Over the last number of years, working conditions in the railway sector have changed considerably in the countries analysed. Increasing overall productivity is the main objective of the transport operators, as is improving the flexibility of applications. This has implications, particularly in relation to defining working time, working location and specific working tasks. At the same time, greater emphasis has been placed on the individual performance of the different employees. Performance-related pay – once only an entitlement of employees at management level – is now gaining importance for all employees, depending on the specific requirements and activities.

In the study, an approximate abstract analysis of the development of employment and working conditions is outlined in the selected countries. Two major conditions had to be taken into account when assessing these deliverables. First, the study had to be conducted within the short period of two months. Second, the increasing level of competition in the railway sector and the high sensitivity of the data available had to be taken into account.

The particular focus on analysing the development of employment and working conditions is noticeable in the study, as is the focus on the specific companies, employee associations and trade unions.

Looking ahead, in view of the ongoing changes in the rail transport sector and in competition structures, continued analysis of the labour markets and of working conditions within the sector is recommended for all the EU Member States. In particular, the restructuring of and interdependence between railway operators in the entire European railway industry should be analysed. Transnational and more interoperable European transport markets should also be a particular focus. Furthermore, the role of social dialogue should be emphasised and strengthened, as should existing relations between the European associations.

Germany

Germany's railway sector is one of the most important in Europe, not just in relation to its industrial market but also with regard to its operations.

Nevertheless, in recent years, there has been a significant decrease in employment in the railway sector in Germany. The merging of the two German railways, Deutsche Bundesbahn and Deutsche Reichsbahn, was one of the main reasons for this decline, as was the political and economical reform of the German railways after 1993. While the unification of east and west Germany led to a high reduction in over-capacities, the reform of the railway sector increased the need for greater productivity and rationalisation. Today, there are about 250,000 to 300,000 employees working in Germany's rail transport sector.

Employment reduction within the sector took place in an environment where industrial relations conflicts had a low impact. The trade unions, particularly TRANSNET and GDBA, evaluated the reduction of employment within DB AG as a socially acceptable form of staff reduction.

Today, competition between the different railway operators is increasing in Germany, particularly in the freight and short-distance passenger transport services sector. This, in turn, has had an increasing impact on the working conditions of employees. Differences exist in the general tariff agreements of the DB AG group and of the private competitors. The DB AG group aims at a more flexible application of existing employees. Competitors, on the other hand, are more focused on the flexibility of specific and local competition development. Overall, there has been a greater move towards a more flexible, individualised and regionalised approach to and cooperation with employees.

Italy

Over the last 15 years, Ferrovie dello Stato (FS) has been transformed into a holding company with several specialised companies. At market level, the FS group still maintains a leading position and continues to employ around 95% of railway workers in Italy.

A number of new players are also currently active in Italy's railway freight transport market, with small but increasing market shares. The first tenders and traffic increases in regional services highlight the growing importance of this transport segment, with the FS group competing and/or cooperating with some small regional companies, which are starting to expand beyond their historical network.

Since 2003, FS's collective agreement has been extended into the wider framework of a national collective agreement, which has also been recognised by other operators. Regional railways companies continue to have a different national agreement, in which changes in industrial relations have been less relevant.

The high level of employment reduction in Italy's railway sector over the last 15 years now seems to be coming to an end. At the same time, changes in working conditions have resulted in the loss of some privileges and in the reduction of beneficial pay differentials along with other working categories. Today, income is more differentiated and dependent on the type of activity carried out.

Italian railway companies have started to develop human resource policies more in line with the policies of other European countries in this field. Meanwhile, the number of accidents involving railway workers has decreased. Although female employment in the sector is increasing, it is still comparatively low (10%–15%). These changes have not affected the role and importance of railway trade unions.

Netherlands

In recent years, the Dutch railway market has opened up extensively to greater competition for transport services. This process is expected to continue in the coming years, as different invitations to tender have already been issued.

Today, the railway sector in the Netherlands encompasses a number of different companies, operating in a highly competitive environment:

- NS Reizigers – operator of the country's core network under contract to the transport ministry and various regional networks;
- NoordNed Personenvervoer bv;
- Syntus;
- Connexxion.

Arising from increasing competition between the different railway operators, the dominating role of NS Reizigers has declined somewhat. The need for personnel within NS is also expected to decline further in the coming years, as a result of the tendering of lines and because of the reduced overhaul and maintenance of trains due to of efficiency measures.

Within the railway sector as a whole, employment has declined from 45,200 employees in 1996 to 37,700 employees in 2003. The railway sector's current share of employment accounts for between 0.54% and 0.77% of total employment in the Netherlands.

Another trend among railway operators is the more flexible, individualised and regionalised approach to and cooperation with employees.

Sweden

Sweden was one of first European countries to liberalise its railway market. In 1999, the former national railway group, Statens Järnväger (SJ), was privatised and divided into different independent companies:

- SJ AB for passenger transport;
- Green Cargo AB for freight transport;
- Euromaint AB for maintenance services;
- TraffiCare AB for station services.

Today, a large number of private operators are currently active in the Swedish railway sector. A significant number of international players have also expressed interest in entering the market.

The liberalisation of Sweden's railway market has led to a dramatic reduction in the overall number of workers in the sector. For example, between 1994 and 2000, the total number of staff members at SJ was reduced by over 50%. In the mid 1990s, nearly 20,000 workers were employed in the rail transport sector. Today, only 8,000 employees are currently working in the sector. The majority of workers whose jobs were cut either took early retirement, or the SJ group tried to secure them a new position within another company.

Working conditions in the Dutch rail transport sector have also changed. Private operators that have won new operation contracts have usually employed former SJ workers, although they are not required to do this by law, nor do they have to maintain the same working conditions as the previous employer. This has sometimes led to conflicts with the trade unions, such as the strike at Citypendeln in 2000. After a number of years of conflict, however, the trade unions have begun to cooperate in the liberalisation and privatisation process. This is a possible sign of a decline in the role of trade unions in the Swedish railway sector.

United Kingdom

The most visible effect of changes in the UK railway sector has been the privatisation and fragmentation of the train operator companies. Unlike the rest of Europe, there is no longer a leading national company in this country's railway sector.

Both passenger and freight transport services have become fragmented and are divided among the different operators. Since 1996, there has been a remarkable increase in passenger transport (a 40% increase in passenger-kilometres and 37% increase in passenger journeys) and in freight traffic (64% increase in tonne-kilometres).

Like the rest of Europe, there has been a further reduction in employment in the last 10 years, although this process was already underway under British Railways. Moreover, the presence of several competitors has created an increased turnover of workers (especially skilled workers and specialists) among the companies. This has led to an increase in pay differentials between skilled und unskilled workers. Categories of workers, such as train drivers, now earn more than they did 10 years ago.

Collective agreements exist at company level, and there are around 100 different agreements in total. Although the role of the trade unions is more complicated due to the greater degree of fragmentation within the sector, their importance has not diminished. Trade unions sometimes possess even more contractual power than they had before, due to difficulties faced by train operating companies in relation to costs associated with training and maintenance of qualified staff. Trade unions have therefore been able to negotiate more favourable working conditions, at least for skilled staff.

Overall, the number of accidents involving railway workers has decreased. Part-time work is still low at around 2% and has not significantly increased in the last 10 years. A slow increase in the level of female employment in the sector is apparent.

Conclusion

Since the early 1990s the European rail transport sector has undergone massive structural change. These changes have largely been driven by EU policies aimed at developing a more integrated European railway market, at improving efficiency and competitiveness in the railway sector, and at further opening up market access to new entrants.

As a result of these developments, the rail transport sector of today has become much more heterogeneous across the Member States. One key change that has already occurred in many of the Member States is the separation of passenger and freight transport services from infrastructure management. This, in turn, has led to a greater focus on core activities, with many of the non-core activities being outsourced either to newly created companies still under state control or to private sector companies. Another key development has been the opening up of markets to new entrants. While some of these new players have been restricted to regional activities, a few European-wide players have emerged serving national and regional markets in several Member States.

The impact of these developments has not only affected the regulatory framework of the European rail transport sector: it has also had significant consequences for employment levels and working conditions in the sector throughout Europe. Extensive restructuring and rationalisation measures, for example, have led to huge reductions in the workforce. Greater diversification of working conditions has also resulted, with conditions offered by the new entrants often differing from those of the state-controlled companies. At the same time, this has resulted in an increased focus on higher degrees of flexibility in working time and work organisation, in addition to an increased demand for skilled workers, as companies adjust to new competitive demands.

Given the impact of reorganisation and restructuring on employment levels and working conditions, industrial relations in the railway sector have also been significantly affected. In some countries, this has led to substantial conflicts, with the liberalisation process and employment reductions attracting strong criticism from the unions. Nevertheless, efforts to reduce the social impact of redundancies have been considerable in the sector, particularly through a combination of different ‘soft’ measures. Moreover, collective bargaining has widely contributed to changes at enterprise level within the sector and is seen as an essential element of the transformation of highly regulated and publicly financed operations into self-sustaining railway companies, open to wider competition.

In spite of the more heterogeneous nature of Europe’s railway sector, there is still considerable diversity among the EU Member States, and the different approach that each country has taken in relation to the liberalisation and restructuring of its railways has led to varying results, particularly with regard to the number of players in the market, the position of the former state monopolies, employment levels and working conditions. Also, although changes have occurred at the ‘micro’ level, many of the former incumbent companies still appear to maintain a dominant position in certain countries.

Despite these differences, the process of liberalising the railway industry has increased market pressures in all countries and has influenced the quantity and quality of employment in the European railway sector as a whole. In the years ahead, this process of liberalisation and restructuring is set to continue and intensify, as new policies – including the third railway package, which is currently being discussed by the European Parliament – drive the rail transport sector forward towards a more integrated and competitive European market.

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Annex

Table A1: *Incumbents and entrants in the railway sector* [4]

Country	Incumbent	Notes	Entrants
Austria	Austrian Federal Railways (Österreichische Bundesbahnen, ÖBB)	The Federal Railways Act 2003 (*Bundesbahngesetz* , BBG) came into force on 1 January 2004 and transformed the government-owned ÖBB into a holding company heading up several legal entities specialising in services, passenger transport, rail cargo and infrastructure. The ÖBB Holding AG was set up on 20 April 2004 and is only responsible for the strategic orientation of the group, as it does not carry out any operative tasks. The separate Track Financing Company (Schienenfinanzierungsgesellschaft, SCHIG), which finances railway construction and maintenance by charging a fee for using the tracks, is integrated into the group.	There are a number of public-owned or mixed-ownership local railways and some private operators in freight transport. Their relevance in terms of employment and traffic is marginal compared with ÖBB's role.
Belgium	Belgian National Railways (Société Nationale des Chemins de Fer Belges/Nationale Maatschappij der Belgische Spoorwegen, SNCB/NMBS)	Since 1 January 2005, the SNCB/NMBS has been divided into three distinct public enterprises: SNCB-Holding, which owns Infrabel, the infrastructure manager, which has the responsibility for managing and developing the Belgian public rail network; and SNCB-Opérateur, the rail operator, which is responsible for the transport of domestic and international passengers and freight. SNCB-Holding employs all workers, who are then posted to Infrabel or SNCB-Operateur, thereby assuring the single status of all group employees. The government owns 99.9% of SNCB-Holding, while the latter owns 100% of SNCB-Opérateur and 50% plus one share of Infrabel (with only 20% of the voting rights). The rest of Infrabel is owned by the government.	The freight company, Dillen & Le Jeune Cargo (D&L Cargo), has operated on the Belgian network since 2002. In addition, other private operators (SC Intercontainer-Interfrigo; SA CMI Traction; SA Trainsport) have been awarded a rail licence by the Ministry of Transport but are still waiting for their safety certificate.
Bulgaria	Bulgarian State Railways (BDZ EAD)	Besides the railway company BDZ EAD, there is the National Railway Infrastructure Company (NCRI), which is the infrastructure ma nager. Both are structured as groups of companies.	No competitors operate in the railway sector. Some maintenance companies were privatised.

[4] For further information on all rail operations, see their respective websites.

Table A1: *Incumbents and entrants in the railway sector (cont'd)*

Country	Incumbent	Notes	Entrants
Czech Republic	Czech Railways (České Dráhy, a.s., ČD)	ČD was incorporated in 2003. It is a successor company of the former government railway firm, together with the Rail Infrastructure Administration (Správa Železniční Dopravní Cesty, Státní Organizace, SŽDC), which acts as the infrastructure manager. The Railway Authority (Drážní Úrad, DÚ), which is part of the government administration, is responsible for licensing and the issue of safety certificates. ČD is the holding company of a group consisting, among others, of the Track Engineering Company (Trat'ová Strojní Společnost, a.s., TSS, a.s.) for maintenance and engineering, Railreklam, the Czech Railways Research Institute Prague (Výzkumný Ústav Železniční Praha, VUŽ) and Czech Railways Telecommunications (ČD Telekomunikace). The establishment of specific subsidiaries for regional passenger transport, long-range passenger transport and freight transport is envisaged for 2006.	There are a number of private and local companies which operate both in freight and passenger transport. They account for some 10% of the overall freight traffic. In 2003, they included Chemopetrol doprava, a.s., Sokolovská Uhelná, a.s. , Mostecká Uhelná Společnost, a.s. (MUS), Unipetrol Doprava, a.s., OKD, Doprava, a.s. , Slezskomoravská Dráha, a.s. (SMD, a.s.), Connex Morava, a.s., Česká Severní Dráha, s.r.o. (ČSD, s.r.o.), Jindřichův Hradec Local Railways (Jindřichohradecké Místní Dráhy, a.s., JHMD), SLokoTrans, s.r.o., Railtrans, s.r.o. and Viamont, a.s.
Germany	German Railways (Deutsche Bahn AG, DB AG)	DB AG is a holding company with five divisions: passenger transport; transport and logistics; passenger stations; track infrastructure; and services. These divisions are responsible for the respective subsidiary companies, including Railion for freight transport and DB Netz, the infrastructure manager. The Federal Railway Office (Eisenbahnbundesamt, EBA) deals with infrastructure access issues.	A number of railway companies operate on the German network for both passenger and freight transport. These companies are owned either by local authorities, private operators or present mixed ownership structures. They include the French Veolia Environment with its subsidiary Connex, Keolis, EuRailCo (a joint venture of the French companies Transdev and RATP) and the Swiss SBB, which mainly operates in the freight sector. They account for less than 5% of total railway employment, less than 1% of the passenger long-distance transport market, some 10% of local transport and around 12% of freight transport.
Denmark	Danish Railways (De Danske Statsbaner, DSB)	DSB is a holding company. In 1997, the Railway Board (Banestyrelsen, now Banedanmark) was separated from DSB to perform the role of infrastructure manager.	In 2000, DSB sold off its freight transport activities to Railion, the freight subsidiary of the German DB AG, and now operates only in passenger transport. There are a number of local railways owned by local authorities. Arriva Tog, a subsidiary of the Arriva group, operates in passenger transport at regional level, where it won a tender placing it in competition with DSB.

Table A1: *Incumbents and entrants in the railway sector (cont'd)*

Country	Incumbent	Notes	Entrants
Estonia	Estonian Railways (AS Eesti Raudtee)	The railway sector was reformed and privatised in the second half of the 1990s. Estonian Railways is the major company and essentially operates in freight transport. It is a joint venture majority, owned by foreign and domestic private investors. The government holds a 34% stake.	A private company set up in 1997, Edelaraudtee AS, operates passenger transport on the main routes in Estonia by diesel trains. Since 2000, it has been owned by the UK company, GB Railways. AS EVR Ekspress, another private firm, started its activities in January 1999. It mainly provides international passenger transport between Estonia and Russia. In September 2005, the railway capacity was allocated by the railway inspector. Estonian railways received the majority of freight railway capacity. The other freight operators are AS Spacecom, Westgate Transport OÜ, Russian-Estonian Rail Services and Coal Terminal. Passenger operators AS EVR Ekspress, Edelaraudtee AS and AS Elektriraudtee (which provides local service in the Tallin area) received the railway capacity they applied for.
Spain	Red Nacional de Ferrocarriles Españoles (RENFE)	According to a 2003 reform, as of January 2005, RENFE-Operadora has been established as the provider of both freight and passenger transport. The infrastructure manager is the Railway Infrastructure Administration (Administrador de Infraestructuras Ferroviarias, ADIF). The new rules provided for the creation of the Railway Regulation Committee (Comité de Regulación Ferroviaria).	There are a number of railways, owned by regional authorities, which traditionally provide local rail services.
Finland	Finnish State Railways, VR Group Ltd	VR Group is a holding company, which controls 21 companies, including VR, the railway operator, and VR-Track, the network manager.	VR Group has exclusive rights for domestic rail transport.
France	French National Railways (Société Nationale des Chemins de Fer Français, SNCF)	In 1997, the French Rail Network (Réseau Ferré de France, RFF) was established as the infrastructure manager. SNCF is one of the major European holding companies in transport; the SNCF group includes hundreds of companies.	The sector is changing with the presence of some private actors, but mainly through the reorganisation of the SNCF group.
Greece	Hellenic Railways Organisation (OSE)	Railway reform started in 1998 and should be completed by 2007. OSE is now a holding company, which heads up a group. The business plan for 2005–2007 envisages splitting the company into 11 subsidiaries, including the infrastructure manager (EDISY) and the railway operator.	OSE still holds a monopoly.

Table A1: *Incumbents and entrants in the railway sector (cont'd)*

Country	Incumbent	Notes	Entrants
Hungary	Hungarian State Railways Company (Magyar Államvasutak Rt, MÁV)	There is separation of accounts between the different divisions of MAV, including the management of infrastructure.	Since the end of World War I, the Győr-Sopron-Ebenfurt Railway Company (Győr-Sopron-Ebenfurti Vasút Rt, GYSEV) operates the lines between Hungary and Austria and is owned by the two governments. Rece ntly, the expanding east-west route has increased the role of GYSEV in freight transport. A number of private companies have started operations in freight transport in recent years.
Ireland	Irish Rail (Iarnród Éireann)	Irish Rail continues to be the monopoly company. It is a subsidiary of Córas Iompair Éireann (CIE), which is the government body responsible for public transport. Separate accounts are kept for transport services and infrastructure management.	There are some announcements of increasing open ness at local level.
Italy	Italian State Railways (Ferrovie di Stato, FS)	FS is a fully government-owned holding, which heads up a large group of companies. Since the late 1990s, the group structure includes Trenitalia as the railway operator and Rete Ferroviaria Italiana (RFI) as the infrastructure manager. Trenitalia is organised through different divisions for long-range passenger transport, local passenger transport and freight transport. Some of the group subsidiaries are joint ventures with private investors, as those responsible form the management of the railway stations (Grandi Stazioni and Centostazioni).	There a number of traditional local railways, often owned by local authorities. There are some new operators in freight transport, as well as so me joint ventures in international passenger transport, essentially between FS and single foreign national railways. The law envisages competitive tendering for the allocation of local rail transport franchises, but so far the implementation has been slow.
Lithuania	Lithuanian Railways (Lietuvos Geležinkeliai, LG)	LG is a joint-stock company fully owned by the government and under the supervision of the Ministry of Transport and Communications. It is organised according to different departments, including infrastructure, passenger transport and freight transport. LG heads up a group of companies for ancillary services (repair, building, printing, etc).	LG holds a de facto monopoly in both passenger and freight transport.
Luxembourg	Luxembourg National Railway Company (Société Nationale des Chemins de Fers Luxembourgeois, SNCFL)	SNCFL controls a number of subsidiaries that are in charge of ancillary activities (such as marketing of freight transport services and travel agency activities). The SNCFL group includes foreign railway companies, such as the German NEGmbH (Norddeutsche Eisenbahn Gesellschaft mbH) and NVAG (Nordfriesische Verkehrsbetriebe AG).	

Table A1: *Incumbents and entrants in the railway sector (cont'd)*

Country	Incumbent	Notes	Entrants
Latvia	Latvian Railways (VAS Latvijas Dzelzceļš, LDz)	LDz is responsible for domestic and international passenger transport (through the subsidiary company VAS Pasažieru vilciens, PV), freight transport and infrastructure management. It has a number of subsidiaries in connected activities, such as in maintenance and real estate management.	There are two other companies that operate in domestic freight transport, which are owned by local authorities: Baltic Transit Service (Baltijas Tranzīta Serviss) and Baltic Express (Baltijas Ekspresis). There are some small local operators in passenger transport owned by local authorities, such as Gulbenes-Alūksnes bānītis.
Netherlands	Dutch Railways (Nederlandse Spoorwegen, NS)	NS was transformed into a joint stock company with the state as the only shareholder. The infrastructure manager is a separate body, ProRail, which is also fully state-owned. NS has a number of subsidiaries, including NS Reizigers for short distance passenger transport.	NS is largely dominant in passenger transport. Some private railways operate on certain marginal local routes, which were dismissed by NS as non-profitable. These include the foreign-owned Arriva in the north and Syntus in the east. The NS freight transport activities were sold in 2000 to Railion, a subsidiary of DG AG. The freight market is liberalised and different firms operate on the network.
Norway	Norwegian State Railways (Norges Statsbaner, NSB AS)	NSB AS is directly responsible for passenger transport, whereas one of its subsidiaries, CargoNet AS (a majority-owned joint venture with the Swedish GreenCargo AB), is responsible for freight transport. The NSB group includes firms for maintenance, cleaning services, real estate management, bus traffic, etc. The infrastructure manager, Jernbaneverket (JBV), is fully separated from the traffic operators.	There a number of companies operating in the freight market besides CargoNet, such as Malmtransport AS, the Norwegian company Ofotbanen AS and the Swedish companies, Green Cargo AB and Tågåkeriet i Bergslagen AB. So far, NSB is the only operator of passenger transport, but there are plans to increase competition in this market. In 2005, Gjøvik-banen was the first line to be put to tender.
Poland	Polish National Railways (Polskie Koleje Państwowe, PKP)	The PKP group has 42 subsidiaries, some of which may be sold to external investors in the near future. These might include local commuter trains in the Warsaw (Warszawska Kolej Dojazdowa, WKD) and Gdańsk (Szybka Kolej Miejska, SKM) areas, as well as the freight transport subsidiary, PKP Cargo SA. The other main subsidiaries are those for local passenger transport (PKP Przewozy Regionalne SA, PKP PR), long-distance passenger transport (PKP Intercity SA) and the infrastructure manager (Polskie Linie Kolejowe SA).	There are a number of local railway companies.

Table A1: *Incumbents and entrants in the railway sector (cont'd)*

Country	Incumbent	Notes	Entrants
Portugal	Comboios de Portugal (CP)	In 1997, the former national railway company (Caminhos de Ferro Portugueses E.P., CP) was split into two units: the rail transport operator for both passengers and freight (Comboios de Portugal E.P., CP) and the infrastructure manager (Rede Ferroviária Nacional E.P., REFER). CP has a stake in many subsidiaries, the main one being responsible for rolling stock maintenance (Empresa de Manutenção de Equipamento Ferroviário S.A., EMEF).	CP has maintained its monopoly as a national transport operator, with the only exception being the regional operator, FERTAGUS, a private company founded in 1999 that runs an important line in passenger transport in the greater Lisbon area.
Romania	National Passenger Operator Company (Societatea Naţională de Transport Feroviar de Călători)	The main companies that resulted from the sector reorganisation of 1998 are the infrastructure manager, the National Railways Company (Compania Natională de Cai Ferate, CNCFR), and the two railway operators, the National Freight Operator Company (Societatea Nationala de Transport Feroviar de Marfă, CFR Marfă) and the National Passenger Operator Company (Societatea Naţionala de Transport Feroviar de Călători, CFR Călători).	In 2004, the secondary railway network was franchised to private operators. A series of private operators entered the rail freight market using the public rail infrastructure, but the extent of liberalisation and privatisation is still marginal.
Sweden	SJ AB	The former Statens Järnvägar was restructured and split into six independent government-owned companies for transport services, real estate management and other ancillary activities. SJ AB operates passenger transport, while GreenCargo AB is responsible for freight transport and others for maintenance. The infrastructure manager is the National Swedish Rail Administration (Banverket).	There are between 20 and 30 private companies operating in national or local rail transport, including Connex Sverige AB, Citypendeln Sverige AB, DSB Sverige AB, Inlandsbanan AB, Roslagståg AB and Svenska Tågkompaniet AB.
Slovenia	Slovenian Railways Holding Company (Holding Slovenske Zeleznice, HSZ)	HSZ has three main subsidiaries, which are responsible for passenger transport, freight transport and infrastructure management, respectively. In addition, it controls a number of subsidiaries in ancillary activities. In 2003, the company launched negotiations on a strategic partnership with Stinnes (a subsidiary of DB AG), but no agreement has been reached so far.	HSZ still holds a monopoly in rail transport.

Table A1: *Incumbents and entrants in the railway sector (cont'd)*

Country	Incumbent	Notes	Entrants
Slovakia	Železničná Spoločnost' (ŽSSK	In 2002, the Railways of the Slovak Republic (Železnice Slovenskej Republiky, ŽSR) were restructured and split into two companies: Železničná Spoločnost', as the transport service provider for both passengers and freight, and Železničná Slovenskej Republiky (Railway of the Republic of Slovakia, ŽSR) as the infrastructure manager. In 2005, responsibility for freight transport was transferred to Železničná Spoločnost' Cargo Slovakia (ZSSK Cargo), a newly established subsidiary of ŽSSK.	A number of other railway companies have access to the Slovak railway network, but only a few are active, such as US Steel Kosice, LTE Logistik a Transport Slovakia (freight transport, branch of Austrian LTE Logistik) and Bratislavská Regionálna Kol'ajová Spoločnost' (passenger transport).
UK	In terms of passenger services, there are 25 main train operating companies (TOCs), in addition to some smaller operators. Some, such as Virgin and GNER, operate a national service on what were referred to as inter-city routes under nationalised British Rail. The remainder generally provide local services. With regard to freight transport, the UK separated rail infrastructure from passenger and freight operations 10 years ago, subsequently privatising all the companies involved.	Network Rail is responsible for the railway infrastructure (stations, bridges, signalling, track, etc) and was created in October 2002 to replace Railtrack, which went into the area of administration. Network Rail is a not-for-profit company limited by guarantee, and technically off the government's balance sheet. The Strategic Rail Authority (SRA) was established in February 2001 to promote rail use and to strategically develop the rail network.	The sector is fully privatised and liberalised. There are more than 40 railway firms operating in passenger transport and five companies operating rail freight services.

Source: *EIRO, 2005*

Table A2: *Trade union and employer organisations in the railway sector*

Country	Employer organisation	Trade union	Company-level representation
Austria	The Federal Organisation of Rail Transport (Fachverband der Schienenbahnen), part of the General Federal Organisation of Transport (Allgemeiner Fachverband des Verkehrs, AFV) under the umbrella of the Chamber of the Economy (Wirtschaftskammer Österreich, WKÖ). The affiliation rate is 100%, as membership of WKÖ is mandatory.	The Union of Railway Workers (Gewerkschaft der Eisenbahner, GdE). Union density represents almost 100% of active workers. Over 45,000 retired workers are also members.	At plant-level, there is a special committee of shop stewards (*Vertrauenspersonenausschuss*), which corresponds to a works council. In addition, there are two representative bodies at regional level (*Personalausschuss*) and at central level (*Zentralausschuss*). The most important actor in company-level industrial relations is the central committee. One-third of the members of the supervisory body of ÖBB are worker representatives. Employee representation at ÖBB is regulated by a specific law, the *Bahnbetriebsverfassungsgesetz,* which was promoted by the union and came into force in 1997.

Table A2: *Trade union and employer organisations in the railway sector (cont'd)*

Country	Employer organisation	Trade union	Company-level representation
Belgium	There is no sectoral employer organisation. Industrial relations are carried out at company-level.	The General Confederation of Public Services (Centrale Générale des Services Publics/De Algemene Centrale der Openbare Diensten, CGSP/ACOD); the CSC/ACV Transport and Communications (CSC/ACV-Transcom); the Independent Union of Railwaymen (Syndicat Indépendant pour les Cheminots/Onafhandelijk Spoorwegvakbond, SIC/OVS); and the Free Trade Union of Civil Servants (Syndicat Libre de la Fonction Publique/Vrij Syndicaat voor het Openbaar Ambt, SLFP/VSOA). Total union density is around 90%.	A special Joint Committee is in charge of collective employment relations at the SNCB/NMBS group. It is made up of 20 members, equally distributed between the company management and the unions. Only the two major unions have seats in this Joint Committee (seven representatives CGSP/ACOD and three representatives SCS/ACV-Transcom), as they satisfy the con ditions set by law, which include a membership above 10% of staff. Other specialised Joint Committees are the National Training Committee and the National Safety Committee.
Bulgaria	There is no sectoral employer organisation.	The Trade Union of the Railway Workers in Bulgaria (TURWB), affiliated to the Confederation of Independent Trade Unions in Bulgaria (CITUB); the Trade Union of Locomotive Staff in Bulgaria (TULSB), affiliated to the Union of Transport Trade Unions (UTTU), which is a member of CITUB; and the National Railway Trade Union (NRTU) Podkrepa, affiliated to the Confederation of Labour (CL) Podkrepa. Total union density is around 75%.	Workers are represented by trade unions. No representation body is present. According to the law on health and safety, there is a joint Health and Safety Commission in each company. For the purposes of collective bargaining, bipartite bodies comprising employers and trade union representatives were established: the Social Partnership Central Councils.
Czech Republic	The Transport Union of the Czech Republic (Svaz Dopravy ČR, SD ČR).	The Trade Union Association of Railway Workers (Odborové Sdružení Železničářů, OSŽ); the Engine Drivers' Federation of the Czech Republic (Federace Strojvůdců ČR, FS ČR); the Federation of Train Crews (Federace vlakových cet, FVČ); the Union of Railways Employees (Unie Železničních Zamestnancu, UŽZ); the Federation of Carriage Examiners (Federace Vozmistru, FV); and the Federation of Railway Workers of the Czech Republic (Federace Železničářů ČR, FŽ ČR). Total union density is around 65%.	

Table A2: *Trade union and employer organisations in the railway sector (cont'd)*

Country	Employer organisation	Trade union	Company-level representation
Denmark	Employer representation is fragmented between the government sector for civil servants at DSB, which is represented by the State Employer's Authority (Personalestyrelsen), the regional authorities for local railways (represented by the Danish Regions, Amtsrådsforeningen, ARF) and the other companies (Arriva, Railion and Metro are members of the Employers' Association of Railways in Denmark, Jernbanernes Arbejdsgiverforening, JA).	Many trade unions are present in the railway sector: the Association of Danish State Employees' Organisations (Statsansattes Kartel, StK); the Union of Danish Railway Workers (Dansk Jernbaneforbund, DJ); HK Trafik & Jernbane, (HK Traffic and Railway); th e United Federation of Danish Workers (Fagligt Fælles Forbund, 3F); the Danish Metalworkers Union (Dansk Metal); the Danish Union of Electricians (Dansk El-Forbund, DEF); and the Danish Association of Professional Technicians (Teknisk Landsforbund, TL). Union density is high.	Shop stewards are the essential worker employee representatives for collective bargaining at company-level. In addition, information and consultation activities are carried out within the so-called Cooperation Committee (Samarbejdsudvalg, SU), in which employees and employers at company-level are represented equally. The activities of the committees are laid down in cooperation agreements in the government, in the counties/municipalities, and in the private sector, respectively.
Estonia	Three railway firms (Estonian Railways, Edelaraudtee and Elektriraudtee) are direct members of the Estonian Employers' Confederation (Eesti Tööandjate Keskliit, ETTK).	The Trade Union of Estonian Railway Workers (Eest i Raudteelaste Ametiühing, ERAÜ) and the Estonian Locomotive Workers' Trade Union (Eesti Vedurimeeste Ametiühing). Union density is around 45%.	
Finland	The Employers' Association for Transport and Special Services (Liikenne-ja Erityisalojen Työnantajat, LTY)	Railwaymen's Union (Rautatieläisten Liitto); Railway Salaried Staff's Union (Rautatievirkamies Liitto, RVL); Finnish Locomotive Men's Union (Veturimiesten Liitto, VML); Technical Personnel of the VR Group (Rautatiealan Teknisten Liitto RTL ry); and VR-AKAVA ry. The overall union density is above 90%.	According to the Act on Cooperation and the cooperation agreement between the Railwaymen's Union and VR, the unions have representatives in the cooperative organs of state railways.

Table A2: *Trade union and employer organisations in the railway sector (cont'd)*

Country	Employer organisation	Trade union	Company-level representation
France	There is no sectoral employer organisation.	The National Federation of French Railway Workers, Management Employees and Technicians (Fédération Nationale des Travailleurs, Cadres et Techniciens des Chemins de Fer Français-CGT); the Federation of Rail Workers (Fédération des Cheminots-CFDT); the Railworkers' Union (Fédération Syndicalistes des Cheminot-CGT-FO); the Federation of Rail Employees (Fédération des Cheminots-CFTC); the Rail Workers' Federation (Fédération des Cheminots-UNSA); the Federation of United Independent Democratic Rail Workers (Fédération des Syndicats de Travailleurs du Rail Solidaires, Unitaires et Démocratiques-SUD); the General Independent Locomotive Drivers' Union (Fédération Générale Autonome des Agents de Conduite, FGAAC); the National Union of Railway and Related Activities' Management Staff (Syndicat National du Personnel d'Encadrement des Chemins de Fer et des Activités Connexes CFE-CGC); and the Senior Management National Union (Syndicat National des Cadres Supérieurs, SNCS). Union density is around 30%.	SNCF has local works councils, a central works council, workplace health and safety committees and workforce delegates. The company also has its own unique institutions, such as job-specific central committees, local committees and network committees, operating on various levels on a joint management/unions basis. Staff representatives on the board of directors are elected according to the 1983 Public Sector Democratisation legislation.
Germany	The Employers' Association of Mobility and Transport Service Providers (Arbeitgeberverband der Mobilitäts und Verkehrsdienstleister, Agv MoVe) represents DB AG and its subsidiaries. Employers in the non-government owned railway sector are organised in the Employers' Association of German Railway Companies (Arbeitgeberverband Deutscher Eisenbahnen, AGVDE).	The main trade union in DB AG is Transnet Gewerkschaft GdED (Transnet), affiliated to the Confederation of German Trade Unions (Deutscher Gewerkschaftsbund, DGB). The other unions are the Verkehrsgewerkschaft GDBA, affiliated to the German Federation of Career Public Servants (Deutscher Beamtenbund, DBB); the German Engine Drivers' Union (Gewerkschaft Deutscher Lokführer, GDL), affiliated to the DBB; and the United Services Union (Vereinte Dienstleistungsgewerkschaft, ver.di), also a DGB affiliate, which organises (alongside Transnet) employees in the non-government owned railway sector. Union density is high.	There are both works councils and staff councils for career civil servants.

Table A2: *Trade union and employer organisations in the railway sector (cont'd)*

Country	Employer organisation	Trade union	Company-level representation
Greece	There is no sectoral employer organisation.	Twenty unions are active in OSE and its subsidiaries. These unions, which are all members of the Pan Hellenic Federation of Railway Workers (POS), are divided into regional, occupation-based and enterprise-level unions, (e.g. Association of Railway Workers of the Peloponnesian, Pan Hellenic Association of OSE Station Masters, and Union of Suburban Rail Employees). Union density is above 90%.	There are employee representatives on the boards of directors of OSE and of its subsidiaries.
Hungary	There is no sectoral employer organisation.	Trade Union of Hungarian Railwaymen (Vasutasok Szakszervezete, VSZ), Free Trade Union of Railway Workers (Vasúti Dolgozók Szabad Szakszervezete, VDSZSZ), Union of Track Maintenance Employees (Pályafenntartók Szakszervezete) and Engine Drivers' Trade Union (Mozdonyvezetők Szakszervezete, MOSZ). In addition to the four major unions, there are some smaller unions representing local interests. The overall union density at MAV is around 50%.	In order to cope with this extremely fragmented trade union structure, the Railway Interest Representation Council (Vasúti Érdekegyeztető Tanács, VÉT) was set up at MÁV in the early 1990s, to channel negotiations, consultation and information processes between unions and management.
Ireland	There is no sectoral employer organisation.	The workforce is represented by at least six official unions, so a fragmented multi-union structure exists. The biggest union in Irish Rail is the Services, Industrial, Professional and Technical Union (SIPTU), which represents members across a number of different grades. The next largest union is the National Bus and Rail Workers' Union (NBRU), which represents locomotive drivers, signal operators, guards and ticket collectors. There are the craft unions, Technical, Electrical and Engineering Union (TEEU), AMICUS and the Transport Salaried Staff Association (TSSA). The Amalgamated Transport and General Workers' Union (ATGWU) also represents members at the company, including 100 or so locomotive drivers from a breakaway union, the Irish Locomotive Drivers' Association (ILDA). All employees at Irish Rail must be a member of a trade union, given that a 'closed shop' exists.	The 1988 Worker Participation (State Enterprise) Act provided for the introduction of sub-board participation structures in the semi-state sector. At Irish Rail, representatives from management and the trade unions participate on company-level, sub-board structures in the form of Local Joint Participation Councils, a Central Participation Group and the Top Participation Group. The company board includes worker directors.

Table A2: *Trade union and employer organisations in the railway sector (cont'd)*

Country	Employer organisation	Trade union	Company-level representation
Italy	The Confederal Agency of Transport and Services (Agenzia Confederale dei Trasporti e dei Servizi, Agens) represents the FS group. The Transport Association (Associazione Trasporti, Asstra) represents local railways.	Filt, the union federation for the transport sector affiliated to Cgil; Fit, the union federation for the transport sector affiliated to Cisl; Uiltrasporti, the union federation for the transport sector affiliated to Uil; Ugl Ferrovie, the independent union federation for the transport sector affiliated to Ugl; Fisasf, a sectoral independent union affiliated to Orsa; Comu, the engine drivers' independent union affiliated to Orsa; Ucs, the station masters' union, which in 2003 merged with the Sulta (air transport) and Cnl (local public transport) unions, to form the United Transport Workers Union (Sindacato Unitario Lavoratori dei Trasporti, Sult); Sma, the independent engine drivers' union affiliated to the General Confederation of Autonomous Trade Unions (Confederazione Generale dei Sindacati Autonomi dei Lavoratori, Confsal); Fast, the independent union organisation for the transport sector affiliated to Confsal; Fisast, an independent trade union affiliated to the Italian Confederation of Service Workers' Unions (Confederazione Italiana Sindacati Addetti ai Servizi, Cisas); Fisas, an independent trade union formerly affiliated to Cisal and now to the Orsa; and Sapec and Sapent, two independent unions which mainly represent ferry workers and are affiliated to Orsa. The overall union density is above 85%.	Collective bargaining and information and consultation rights are held by the Unitary Workplace Union Structures (Rsu). The Rsu are elected periodically by all employees.
Latvia	LDz is a direct member of the Latvian Employers' Confederation (Latvijas Darba Devēju Konfederācija, LDDK).	The Latvian Railway Workers Trade Union (Latvijas Dzeļzce lnieku Arodbiedrība, LDzA) groups 108 union organisations. Union density is about 80%.	Trade union representatives
Lithuania	There is no sectoral employer organisation.	Employees' interests are represented by three trade unions: the Lithuanian Federation of Railway Workers (Lietuvos Geležinkelininku Profsąjungų Federacija, LGPF), which group 23 union organisations; the Lithuanian Association of Trade Unions of Railway Workers (Lietuvos Geležinkelininkų Profesinių Sajungų Susivienijimas, LGPSS); and the Lithuanian Railway Trade Union (Lietuvos Geležinkelio Profesinė Sąjunga, LGPS). Union density is around 45%.	In 2001, the meeting of the representatives of LG employees delegated the functions of representation of their interests to LGPF and to the Joint Representation of LGPSS.

Table A2: *Trade union and employer organisations in the railway sector (cont'd)*

Country	Employer organisation	Trade union	Company-level representation
Luxembourg	There is no employer organisation.	The two leading trade unions involved in this sector are the National Federation of Luxembourg Railway and Transport Workers and Civil Servants (Fédération Nationale des Cheminots, Travailleurs du Transport, Fonctionnaires et Employés du Luxembourg, FNCTTFEL) and the Christian Transport Workers' Trade Union (Syndicat des Travailleurs du Transport Chrétiens, SYPROLUX). Union density is around 95%.	The SNCFL has a Joint Works Committee, a Central Employee Committee and a Joint Committee. Five out of 15 members of the company board of directors represent the employees (two FNCTTFEL, two SYPROLUX and the president of the Central Employee Committee).
Netherlands	NS is a member of the largest, national employer organisation, AWVN (a partner of VNO-NCW).	The relevant unions are FNV Bondgenoten, CNV Bedrijvenbond, Vereniging van Hoger Spoorwegpersoneel and the Vereniging van Machinisten en Conducteurs (VVMC). Union density is between 65% and 70%.	At NS, there is a system of works councils. Enterprise works councils are covered by several umbrella works councils at a higher level, with one overall umbrella works council at company level. According to general legislation, works councils have information and consultation rights as far as the strategic decisions are concerned, with a right of appeal, plus a right of consent in social affairs.
Norway	NSB AS (and affiliated companies) are organised in the Employer Association, NAVO.	Two trade unions together organise most of the employees in the railway sector: the Norwegian Union of Railway Workers (Norsk Jernbaneforbund, NJF) and the Norwegian Union of Locomotivemen (Norsk Lokomotivmannsforbund, NLF). In addition, some other trade unions are represented in the railway sector, for instance, the trade unions for engineers and certified engineers (NITO and TEKNA), and the Union of Civil Servants (STAFO), affiliated to the Confederation of Vocational Unions (Yrkesorganisasjonenes Sentralforbund, YS). Union density is high.	
Poland	The Association of Railway Employers (Związek Pracodawców Kolejowych, ZPK).	There are 28 trade unions active in the Polish rail transport sector. Union density is around 95%.	
Portugal	There is no employer organisation.	The National Union of Workers in the Railway Sector (Sindicato Nacional dos Trabalhadores do Sector Ferroviário, SNTSF/CGTP); SINDEFER, SINAFE, SINFA and SINFESE, which are members of UGT and set up a coordination body (UGFER; the National Trade Union of Engine Drivers, Sindicato dos Maquinistas, SMAQ). Union density is about 90%.	Works councils exist in the three dominating companies: CP, EMEF and REFER. The new private company, FERTAGUS, does not have any company-level representative body.

Table A2: *Trade union and employer organisations in the railway sector (cont'd)*

Country	Employer organisation	Trade union	Company-level representation
Romania	The National Confederation of Romanian Employers (Confederaţia Naţională a Patronatelor din România, CNPR).	The Independent Federation o f Traffic Trade in Rail Transport (Federaţia Independentă a Sindicatelor Mişcare-Comercial din Transporturile Feroviare, FISMCTF), the Federation of Engine Drivers (Federaţia Mecanicilor de Locomotivă, FML), the Federation of Trade Unions in the Train Carriage Branch (Federaţia Sindicatelor din Ramura Vagoane, FSRV), the Iron Railroad Federation (Federaţia Drum de Fier) and the Elcatel Federation (Federaţia Elcatel). Union density is around 60%.	
Slovakia	The Association of Employers in Transport, Posts and Telecommunication (Asociácia Zamestnávate l'ov Dopravy, Pôšt a Telekomunikácií).	One of the biggest trade union organisations is the Trade Union Association of Railwaymen (Odborové Združenie Železničiarov, OZŽ), which is a member of the Confederation of Trade Unions (Konfederácia odborových zväzov Slovenskej republiky, KOZ SR). It also represents employees working in private companies, which provide services for railways, e.g. railway repair and machinery engineering (Železnicné Opravovne Astrojárne, ŽOS) Vrútky, Vagon Slovakia Košice and Bratislava (dining and sleeping wagons). In the MDPT SR (the Ministry of Transport, Post and Telecommunications) sector, the Association of Transport, Post and Telecommunications Trade Unions (Asociácia Odborovych Zväzov Dopravy, Pôšt a Telekomunikácií) is active and brings employees' interests to the ministry. Some employees of railways are organised in the NKOS Trade Union – railways that are members of another trade union centre – or the Independent Christian Trade Unions of Slovakia (Nezávislé Krest'anské Odbory Slovenska, NKOS). Union density is around 70%.	OZŽ has three elected representatives in the management board of ŽSR and three representatives in the supervisory board of ZSSK.

Table A2: *Trade union and employer organisations in the railway sector (cont'd)*

Country	Employer organisation	Trade union	Company-level representation
Slovenia	Slovenian Railways Holding Company is a member of the Slovenian Employers' Association (Zdruzenje Delodajalcev Slovenije, ZDS) and of the Chamber of Commerce and Industry of Slovenia (Gospodarska Zbornica Slovenije, GZS).	There are nine representative trade unions in the railway sector: the Railway Workers' Union of Slovenia (Sindikat Zeleznicarjev Slovenije, SZS), the Locomotive Drivers' Union of Slovenia (Sindikat Strojevodij Slovenije, SSSLO), the Railway Transport Union of Slovenia (Sindikat Zelezniskega Transporta Slovenije, SZTS), the Railway Traffic Union of Slovenia (Sindikat Zelezniskega Prometa, SZPS), the Workers' Union for Railway Service of Slovenia (Sindikat Delavcev Zelezniske Dejavnosti, SDZDS), the Railway Convey Controllers' Union of Slovenia (Sindikat Vozovnih Preglednikov Slovenije, SVPS), Independent Trade Union for Line Maintenance Service of Slovenia (Samostojni Sindikat Progovzdrzevalne Dejavnosti Slovenije, SSPD) and two trade unions of affiliated companies: the Trade Union of Maintenance Workers for Rail Transport Means of Slovenia (Sindikat Vzdrzevalcev Zelezniskih Voznih Sredstev Slovenije, SVZVSS) and the Trade Union of Maintenance Workers for Locomotives Moste (Sindikat Vzdrževalcev Lokomotiv Moste, SVLM). Union density is almost 90%.	Based on the Worker Participation in Management Act (1993) and the Participative Agreement in the HSZ, the employee representative bodies in Slovenian Railways Holding Company are works council representatives of employees at the Supervisory Board and worker directors.
Spain	There is no sectoral employer organisation.	The General Workers' Confederation (Unión General de Trabajadores, UGT), the Trade Union Confederation of Workers' Commissions (Comisiones Obreras, CCOO) and the Sindicato Español de Maquinistas y Ayudantes Ferroviarios (SEMAF) are the majority trade unions. The General Confederation of Labour (Confederación General del Trabajo, CGT) is also present in the sector. The total union density at RENFE is around 90%.	At RENFE, there are provincial workers' committees and a multi-workplace workers' committee. The majority trade unions, CCOO and the UGT, have representatives on the RENFE board of directors.

Table A2: *Trade union and employer organisations in the railway sector (cont'd)*

Country	Employer organisation	Trade union	Company-level representation
Sweden	The Almega Service Associations (Almega Tjänsteförbunden) organise the private rail companies (passenger traffic and freight traffic), including SJ AB.	The blue-collar workers' Union for Service and Communication (Facket för Service och Kommunikation, SEKO) organises government and private employees in the railway sector. SEKO has a special department called SEKO Trafik, encompassing 27,000 SEKO members, the majority of whom are employed in the railway sector. The white-collar workers in the state-owned company SJ AB, as well as the white-collar workers at Banverket, are organised in the Civil Servants' Union (Statstjänstemannaförbundet, ST), affiliated to the Confederation of Professional Employees (Tjänstemannaorganisationen, TCO). White-collar workers in the private rail companies may be organised in either the Commercial Employees' Union HTF (Handelstjänstemannaförbundet HTF), or ST. The Swedish Confederation of Professional Associations (Sveriges Akademikers Centralorganisation, SACO) has an affiliate association for traffic and railway (Trafik och Järnväg, TJ), organising private professionals. SACO-S organises the government professionals. Svensk Lokförarförening, SLFF, is an independent trade union for engine drivers. Union density is high.	Shop stewards
UK	There is no sectoral employer organisation.	The main unions are the Associated Society of Locomotive Engineers and Firemen (ASLEF), which represents 96% of rail drivers; the Transport Salaried Staffs' Association (TSSA), which represents administrative staff; and the Rail, Maritime and Transport Union (RMT), which represents onboard train staff and others employed in stations, track maintenance and depots.	

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