RESEARCH REPORT

Eurofound

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Railway sector

Representativeness of the European social partner organisations: Railway sector

Eurofound

European Foundation for the Improvement of Living and Working Conditions

When citing this report, please use the following wording:
Eurofound (2026), *Representativeness of the European social partner organisations: Railway sector*, Sectoral social dialogue series, Publications Office of the European Union, Luxembourg.

Authors: Inga Pavlovaite and Victoria Cojocariu

Research managers: Victoria Cojocariu and Tina Weber

Eurofound project: Representativeness studies (250207)

Provider: Network of Eurofound Correspondents (see Table 66)

PDF: ISBN 978-92-897-2596-5 doi:10.2806/8334779 TJ-01-26-028-EN-N

This report and any associated materials are available online at https://eurofound.link/ef26044

It is part of Eurofound's Sectoral social dialogue series. See the full series at https://eurofound.link/efs006

© European Foundation for the Improvement of Living and Working Conditions, 2026

Reproduction is authorised provided the source is acknowledged.

For any use or reproduction of photos or other material that is not under the Eurofound copyright, permission must be sought directly from the copyright holders.

Cover image: © Pinosub/Adobe Stock

Any queries on copyright must be addressed in writing to: copyright@eurofound.europa.eu

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency established in 1975. Its role is to provide knowledge in the area of social, employment and work-related policies according to Regulation (EU) 2019/127.

European Foundation for the Improvement of Living and Working Conditions

Telephone: (+353 1) 204 31 00

Email: information@eurofound.europa.eu

Web: www.eurofound.europa.eu

Contents

Executive summary **1**
Introduction **4**
Sector factsheet 5
1. Sector overview **8**
1.1. Scope of the railway sector 8
1.2. Railway sector workforce 10
1.3. Railway sector companies 18
1.4. National sectoral trade unions and employer organisations and their collective bargaining coverage 21
1.5. Changes in the industrial relations landscape at the national level 23
2. European sectoral social dialogue for the railway sector **27**
3. ETF **30**
3.1. Sector-relatedness of ETF member organisations in the railway sector 35
3.2. ETF's role in national sectoral industrial relations 37
3.3. ETF's structures to ensure its members' effective participation 41
3.4. ETF's negotiation capacity 43
3.5. ETF members' effective participation in the railway sector ESSDC 44
4. CER **46**
4.1. Sector-relatedness of CER and its member organisations in the railway sector 51
4.2. CER's role in the sectoral industrial relations landscape 55
4.3. CER's structures to ensure its members' effective participation 63
4.4. CER's negotiation capacity 65
4.5. CER members' effective participation in the railway sector ESSDC 67
5. EIM **68**
5.1. Sector-relatedness of EIM and its member organisations in the railway sector 70
5.2. EIM's role in the sectoral industrial relations landscape 72
5.3. EIM's structures to ensure its members' effective participation 77
5.4. EIM's negotiation capacity 78
5.5. EIM members' effective participation in the railway sector ESSDC 80
6. Social partner organisations not represented on the railway sector ESSDC **81**
6.1. National sectoral trade unions not represented on the railway sector ESSDC 81
6.2. National sectoral employer organisations and business associations not represented on the ESSDC 92
7. Other European organisations **97**
7.1. Other European trade union organisations (including ALE) 97
7.2. Other European employer organisations and business associations (including ERFA) 99
8. Conclusion **105**
References **109**
Annex **111**

List of tables

Table 1: Classification of activities relevant to the railway sector based on NACE (Rev 2.1) codes..... 8
Table 2: Workforce of the railway sector, EU-25, 2022..... 11
Table 3: Total number of employees in rail undertakings (main and other) and the share of employees in main rail undertakings, EU-25, 2022..... 12
Table 4: Total number of employees working as infrastructure managers and train drivers, EU-25, 2022..... 13
Table 5: Railway sector companies (based on number of active rail licences), EU-25, 2022..... 18
Table 6: Numbers of national sectoral trade unions and employer organisations, EU-25, 2024..... 21
Table 7: Number of national sectoral trade unions and employer organisations involved in collective bargaining, EU-25, 2024..... 23
Table 8: Number of national sectoral trade unions, EU-25, 2017 and 2024..... 25
Table 9: Number of national sectoral employer organisations, EU-25, 2017 and 2024..... 26
Table 10: Membership strength of the sectoral trade unions affiliated to ETF, EU-25, 2024..... 32
Table 11: ETF affiliates, EU-25, 2017 and 2024..... 33
Table 12: Types of workers in the railway sectoral trade unions affiliated to ETF, by different parts of the sector, EU-25, 2024..... 36
Table 13: Types of workers who are members in the railway sectoral trade unions affiliated to ETF, by employment status, EU-25, 2024..... 36
Table 14: Types of workers who are members in the railway sectoral trade unions affiliated to ETF, by skill level, EU-25, 2024..... 37
Table 15: Types of workers who are members in the railway sectoral trade unions affiliated to ETF, by the size of company they are working at, EU-25, 2024..... 37
Table 16: ETF affiliates involved in national social dialogue structures, EU-25, 2024..... 38
Table 17: Trade unions' involvement in collective bargaining, EU-25, 2024..... 39
Table 18: List of ETF-affiliated trade unions' involvement in collective bargaining and coverage level, EU-25, 2024..... 39
Table 19: Representative status of ETF-affiliated national-level organisations, EU-25, 2024..... 41
Table 20: ETF affiliates' participation in ETF structures, EU-25, 2024..... 41
Table 21: Overview of ETF members' participation in railway sector ESSDC meetings, 2023–2025..... 45
Table 22: Membership strength of employer organisations affiliated to CER, EU-25, 2024..... 47
Table 23: Membership strength of companies affiliated to CER, EU-25, 2024..... 48
Table 24: CER affiliates, EU-25, 2017 and 2024..... 49
Table 25: Sectoral coverage of CER-affiliated employer organisations, EU-25, 2024..... 52
Table 26: Sectoral coverage of companies affiliated to CER, EU-25, 2024..... 53
Table 27: CER employer organisation members by size of companies affiliated, EU-25, 2024..... 55
Table 28: CER employer organisation affiliates involvement in social dialogue in the railway sector, EU-25, 2024..... 56
Table 29: CER company affiliates involved in social dialogue in the railway sector, EU-25, 2024..... 57
Table 30: Overview of CER-affiliated employer organisations' involvement in railway sector collective bargaining, EU-25, 2024..... 59
Table 31: Overview of CER-affiliated employer organisations' involvement in railway sector collective bargaining, EU-25, 2024..... 59

Table 32: Overview of CER affiliated companies' involvement in railway sector collective bargaining, EU-25, 2024 61
Table 33: Representative status of CER-affiliated employer organisations, EU-25, 2024 63
Table 34: Sectoral employer organisations' involvement in CER bodies, EU-25, 2024 64
Table 35: Sectoral companies' involvement in CER bodies, EU-25, 2024 64
Table 36: Overview of CER members' (employer organisations and companies) participation in railway sector ESSDC meetings, 2023–2025 67
Table 37: Membership strength of employer organisations affiliated to EIM, EU-25, 2024 69
Table 38: Membership strength of companies affiliated to EIM, EU-25, 2024 69
Table 39: EIM affiliates, EU-25, 2017 and 2024 70
Table 40: Sectoral coverage of EIM-affiliated employer organisations, EU-25, 2024 71
Table 41: Sectoral coverage of companies affiliated to EIM, EU-25, 2024 72
Table 42: EIM employer organisation affiliates involved in social dialogue in the railway sector, EU-25, 2024 73
Table 43: EIM company affiliates involved in social dialogue in the railway sector, EU-25, 2024 74
Table 44: Overview of EIM-affiliated employer organisations' involvement in railway sector collective bargaining, EU-25, 2024 75
Table 45: Overview of EIM employer organisation and company affiliates' involvement in railway sector collective bargaining, EU-25, 2024 76
Table 46: Representative status of EIM-affiliated employer organisations, EU-25, 2024 77
Table 47: Sectoral employer organisations and companies' involvement in EIM bodies, EU-25, 2024 78
Table 48: Overview of EIM members' (employer organisations and companies) participation in railway sector ESSDC meetings, 2023–2025 80
Table 49: Membership strength of national trade unions not represented on the railway sector ESSDC, 2024 83
Table 50: Sector-relatedness of national trade unions not represented on the railway sector ESSDC, EU-25, 2024 88
Table 51: Membership strength of national employer organisations not represented on the railway ESSDC, EU-25, 2024 93
Table 52: Sector-relatedness of national employer organisations not represented on the railway ESSDC, EU-25, 2024 96
Table 53: Trade unions affiliated to other railway sector trade union associations, EU-25, 2024 97
Table 54: Membership strength, role in the industrial relations landscape of ALE affiliates, Europe, 2024 98
Table 55: Sector-relatedness of ALE affiliates, EU-25, 2024 99
Table 56: Other European organisations with affiliated railway sector national employer organisations, EU-25, 2024 100
Table 57: ERFA-affiliated employer organisations, EU-25, 2024 101
Table 58: ERFA-affiliated national railway companies, EU-25, 2024 101
Table 59: ERFA-affiliated transnational railway companies, 2024 101
Table 60: Sector-relatedness of ERFA members (employer organisations and companies), EU-25, 2024 103
Table 61: Position of ERFA affiliates (employer organisations and companies) in the industrial relations landscape, EU-25, 2024 104

Table 62: Comparative overview of the social partners in the railway sector based on Commission Decision 98/500/EC criteria 108
Table 63: List of national sectoral trade unions included in the study, EU-25, 2024 111
Table 64: List of national sectoral employer organisations included in the study, EU-25, 2024..... 116
Table 65: List of the railway ESSDC's agreements, opinions and actions, since 1986..... 118
Table 66: National Eurofound correspondents who have contributed to this study..... 123

List of figures

Figure 1: Share of total railway employees, by gender, EU-25, 2022 (%)..... 15
Figure 2: Total number of railway sector employees, by age group, EU-25, 2018–2022 (%) 15
Figure 3: Share of employees of the incumbent/main rail undertaking in each Member State, by contract type, EU-25, 2022 (%)..... 16
Figure 4: Share of employees, by contract type and Member State, EU-25, 2022 (%) 17
Figure 5a: Proportion of companies, by company size, in passenger and freight rail transport, EU-25, 2022 (%) 20
Figure 6: Scoreboard of the representativeness of ETF in the railway sector, EU-25, 2024 30
Figure 7: Scoreboard of the representativeness of CER in the railway sector, EU-25, 2024..... 46
Figure 8: Scoreboard of the representativeness of EIM, railway sector, EU-25, 2024..... 68

Abbreviations

ALE Federation of European Train Drivers' Unions

CER Community of European Railway and Infrastructure Companies

EIM European Rail Infrastructure Managers

ERFA European Rail Freight Association

ESSDC European sectoral social dialogue committee

ETF European Transport Workers' Federation

NACE statistical classification of economic activities in the European Community

RMMS Rail Market Monitoring Survey

TFEU Treaty on the Functioning of the European Union

Country codes

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

Executive summary

Introduction

The purpose of this study is to assess the representativeness of the European social partners in the railway sector based on the membership of their affiliated national organisations. As is traditional for representativeness studies, the railway sector has been defined in the study through the following four general industrial classification of economic activities within the European Union (NACE) Rev. 2.1 codes: 49.1 – passenger rail transport, 49.2 – freight rail transport, 52.21 – service activities incidental to land transportation and 52.3 – intermediation service activities for transportation. The study covers 25 EU Member States (as there are no railways in Cyprus and Malta), referred to throughout as the EU-25.

Policy context

'Representativeness is defined by the European Commission decision of 20 May 1998 on the establishment of European sectoral social dialogue committees (ESSDCs) promoting the dialogue between the social partners at the European level (Commission Decision 98/500/EC. Based on this assessment of their representativeness, the European Commission can decide which organisations should be retained in or added to the list of organisations entitled to be consulted under Article 154 of the Treaty on the Functioning of the European Union. In the case of European social partner agreements, required to be implemented by means of a Council directive, as set out in Article 155 of the Treaty of the Functioning of the European Union, the regulative powers granted to European social partners are based on their representativeness.

Key findings

- The railway sector in the EU-25 employs 903 463 workers, or 0.5 % of the EU-25's total workforce. The Member States with the largest sectoral workforces, in absolute numbers, are France, Germany, Poland and Italy, followed by Romania, Hungary and Czechia. At the other end of the spectrum, Greece and Estonia have fewer than 2 500 employees each in the railway sector. The overall level of employment in the sector has declined slightly since the last representativeness study was published in 2017. There are around 1 200 companies operating in the railway sector, which represents less than 0.1 % of the total number of enterprises in the EU-25.
- Around 400 000 workers in the sector are employed in the main rail undertakings, around 123 000 as train drivers in both main and other railway undertakings, and around 388 000 workers as infrastructure managers. Most employees in the railway sector have standard permanent full-time employment contracts. The process of liberalisation fostered by EU regulation in the railway sector has translated into a growing number of companies delivering railway services.
- The EU-25 workforce in the railway sector is organised by 137 national-level trade unions. There is at least one trade union organisation in each of the 25 Member States with railways.
- The approximately 1 200 railway companies in the EU-25 are represented by 35 national-level employer organisations. There is at least one employer organisation each in 17 Member States, with several recording four or five employer organisations (Germany, Italy, Poland). Railway

companies are not represented by any employer organisations in eight Member States (Bulgaria, Croatia, Estonia, Greece, Ireland, Latvia, Luxembourg, the Netherlands) where large train operators are predominant. Large former state monopoly railway companies play a significant part in the sector in many Member States (e.g. SNCF in France, Deutsche Bahn in Germany and Trenitalia in Italy).

- A total of 128 national-level trade unions and 17 employer organisations are involved in collective bargaining (at any level) in the railway sector. Among the sectoral trade unions, in each of Luxembourg, the Netherlands, Poland and Sweden there is one trade union that is not involved in collective bargaining, while in Greece two out of four unions are not involved in any bargaining. In Belgium, 3 out of 9 unions report no involvement. One employer organisation is not involved in sector-related collective bargaining in each of Denmark, Hungary, Portugal and Slovenia. Two employer organisations are not involved in each of Czechia, Germany, Italy, Romania and Slovakia, while four are not involved in Poland. However, given that the vast majority of the workforce is employed by large companies in this sector, in most cases collective bargaining taking place at the company level covers most of the workforce in the aforementioned Member States. Additionally, given the decentralised nature of collective bargaining in some of the central and eastern European Member States, the role and coverage of company-level agreements is particularly important.
- The most representative European organisation representing the workforce in the railway sector is the European Transport Workers' Federation (ETF), which has 44 affiliated national trade unions in 22 Member States. These national trade unions organise 54 % of the total EU workforce in the sector. Almost all (95 % of) ETF-affiliated trade unions are involved in collective bargaining in 21 Member States. In terms of sector-relatedness, ETF affiliates have members in all the parts of the railway sector.
- The most representative European organisation representing the companies active in the railway sector is the Community of European Railway and Infrastructure Companies (CER), while the European Rail Infrastructure Managers (EIM), bearing in mind the limitations of its structures to ensure the effective participation of its members, adds to CER's representativeness.
- CER has five affiliated national employer organisations and 42 affiliated companies covering all 25 Member States. These national employer organisations represent 47 % of the total EU companies in the sector and 87 % of the total sectoral workforce. In terms of sector-relatedness, CER affiliates have member companies in all the parts of the railway sector. Some 88 % of CER-affiliated employer organisations and companies participate in collective bargaining in 25 Member States.
- EIM has two affiliated national employer organisations and 12 affiliated companies in 10 Member States. These national employer organisations represent around 1 % of all EU companies in the sector and 17 % of the total sectoral workforce. In terms of sector-relatedness, EIM affiliates have member companies in all the parts of the railway sector. Twelve EIM employer organisation and company affiliates in 10 countries are involved in collective bargaining.
- Another EU-level organisation with some worker representativeness in the sector is the Federation of European Train Drivers' Unions (ALE), with 12 affiliated sectoral trade unions in 12

Member States. ALE members represent 5 % of the entire European sectoral workforce, including 37 % of train drivers employed in the EU-25. Eleven ALE affiliates are involved in collective bargaining processes.

- Another EU-level organisation with some representativeness in the sector on the employer side is the European Rail Freight Association (ERFA), with six employer organisation affiliates in five Member States, 13 national company members operating in 13 Member States and four transnational companies operating across several Member States. ERFA's membership covers around 250 companies, which is. around 21 % of all sectoral companies in the EU-25. One ERFA company affiliate is involved in collective bargaining.

Introduction

The purpose of this study is to assess the representativeness of the European social partners (trade unions as workers' representatives, and employer organisations and business associations as employers' representatives) in the railway sector, based on the membership of the affiliated national organisations. Based on this assessment of their representativeness, the European Commission can decide which organisations should be retained or added to the list of organisations entitled to be consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU). In the case of European social partner agreements, required to be implemented by means of a Council directive, as set out in Article 155 of the TFEU, the regulatory powers granted to European social partners are based on their representativeness.

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

- being related to specific sectors or categories and being organised at the European level;
- being representative of organisations that are themselves an integral and recognised part of the EU Member States' social partner structures, that have the capacity to negotiate labour agreements and that are representative of several Member States;
- having adequate structures to ensure the organisation's effective participation in the work of a European sectoral social dialogue committee (ESSDC).

The study covers 25 Member States (hereinafter the EU-25), as there is no railway sector in Cyprus or Malta.

Additionally, it is noteworthy that, in the current study, given that both sector-relevant employer organisations and business associations are considered, the term 'employer organisation(s)' is used to refer to both employer organisations and business associations for the sake of brevity. This is relevant in Section 4.2.3, in the case of Community of European Railway and Infrastructure Companies (CER) membership, and Section 5.2.3, for the European Rail Infrastructure Managers (EIM) members.

Sector factsheet

Railway sector	
Relevant general industrial classification of economic activities within the European Union (NACE) Rev. 2.1 codes	49.1 – passenger rail transport 49.2 – freight rail transport 52.21 – service activities incidental to land transportation 52.3 – intermediation service activities for transportation
Sectoral share of EU gross domestic product	Approximately 1.4 % of the EU-27 gross domestic product (2023)
Number of companies in the sector and size breakdown of the companies (total and in terms of employment)	1 202 companies (2022) Distribution by size categories of companies in the railway sector: 0–9 employees: 68 % passenger rail, 56 % freight rail 10–19 employees: 2 % passenger rail, 10 % freight rail 20–49 employees: 6 % passenger rail, 13 % freight rail 50–249 employees: 8 % passenger rail, 14 % freight rail Over 250 employees: 16 % passenger rail, 7 % freight rail
Employment in the sector – including the total from the most recent year available, and by Member State as a share of all employment, for the most recent year available	903 463 individuals work in the railway sector (2023), representing 0.5 % of the EU-25 workforce. France, Germany and Poland employ more than 54 % of the EU-25 sectoral workforce (2023). No railway activities are reported in Cyprus and Malta.
The organisations involved in social dialogue at the EU level	
Trade unions	
Name of representative EU-level trade union organisation	**European Transport Workers' Federation (ETF)**
Number of Member States covered by affiliated members (with mention of Member States not covered where the sector exists)	44 national sectoral trade unions are affiliated to ETF in 22 Member States. In Estonia, Portugal and Romania, railway workers are organised by at least one union, but it is not an ETF member. No railway activities are reported in Cyprus or Malta.
Number of employees and share of EU sectoral workforce represented by all affiliates	ETF's membership accounts for 33 % of sectoral unions, representing around 54 % of the total workforce in the sector. The federation organises around 486 000 workers.

Share of EU workforce covered by collective agreements negotiated by affiliates in the sector	On average, around 76 % of the sectoral EU workforce are covered. ETF has 42 affiliated unions (95 %) involved in collective bargaining for the sector. The remaining two ETF-affiliated unions, which are not involved in collective bargaining, are from Greece and Luxembourg. No railway activities are reported in Cyprus or Malta.
Employer organisations	
Names of representative EU-level employer organisations	1. **CER** 2. **EIM**
Number of Member States covered by affiliated members (with mention of Member States not covered where the sector exists) for each relevant organisation	1. **CER** has five sector-related employer organisations and 42 affiliated companies in all 25 Member States. 2. **EIM** has two sector-related employer organisations and 12 companies in 10 Member States: Belgium, Denmark, Finland, France, Ireland, the Netherlands, Poland, Portugal, Spain and Sweden. There are employer organisations representing companies in the railway sector in 15 Member States (Austria, Bulgaria, Croatia, Czechia, Estonia, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Romania, Slovakia and Slovenia) that are not represented by EIM. No railway activities are reported in Cyprus or Malta.
Share of companies covered by affiliates	1. **CER** members represent 14 % of national sectoral employer organisations, representing around 570 sectoral companies (including companies affiliated to a national employer organisation for the railway sector as well as companies affiliated directly to CER) in the EU-25. 2. **EIM** members represent 6 % of national sectoral employer organisations, representing 14 sectoral companies in the EU-25.
Number of employees and share of EU sectoral workforce represented by all affiliates	1. **CER** members employ around 788 866 workers, or more than 87 % of the entire EU workforce in the railway sector. 2. **EIM** members employ approximately 17 % of the entire European workforce in the railway sector, or around 156 951 workers.

Share of EU workforce covered by collective agreements negotiated by affiliates in the sector	1. **CER** has members (employer organisations and companies) involved in sectoral collective bargaining for the railway sector in all 25 Member States, with an average workforce coverage of 50 %. 2. **EIM** has members involved in sectoral collective bargaining for the railway sector in seven Member States: Belgium, Denmark, France, Ireland, the Netherlands, Poland and Portugal. The EIM affiliates from Finland, Spain and Sweden were not involved in collective bargaining in 2024. No railway activities are reported in Cyprus or Malta.
Key challenges for the sector	
Main challenges in the sector	• Transitioning to a market with competing service providers due to market liberalisation and market opening • Ageing workforce • Challenges in staff recruiting • Competing with other modes of transport • Adapting to the process of automation and digitalisation • Responding to the challenges of the green transition
Key themes of social dialogue	
Key themes covered by social dialogue in the sector in the last 10 years	• Revision of Directive 2007/59/EC (the Train Drivers Directive) • Implementation of the EU social partner project Women in Rail Agreement • Assuring railway safety • Rail freight and employment

1. Sector overview

1.1. Scope of the railway sector

For the demarcation of a specific sector within the framework of a representativeness study, reference is made to a number of codes from NACE Rev. 2.1. The railway sector has been defined in this study using the following NACE codes (see Table 1).

Table 1: Classification of activities relevant to the railway sector based on NACE (Rev 2.1) codes

NACE code	Activity description
49.1 – passenger rail transport	Activities related to rail transport of passengers: 49.11 - Rail transportation of passengers using railway rolling stock and mainline networks, spread over an extensive geographical area; passenger transport by interurban railways; operation of sleeping cars or dining cars as an integrated operation of railway companies.
49.2 – freight rail transport	Activities related to rail transport of animals or freight: 49.20 - Freight transportation on mainline rail networks and short line freight railways.
52.21 – service activities incidental to land transportation	Activities related to land transport of passengers, animals or freight: - Operation of terminal facilities such as railway stations, bus stations and stations for the handling of goods - Operation of railway infrastructure - Operation of bridges and tunnels: switching and shunting.
52.3 – intermediation service activities for transportation	Activities of intermediation of freight and passenger transport: 52.31 – intermediation service activities for freight transportation (rail, freight brokerage, operation of platforms for intermediation of freight transport services) 52.32 – intermediation service activities for passenger transportation (fee-based reservation services for passenger transport)

Source: NACE Rev. 2.1.

In addition to the NACE codes, another important source for distinguishing the activities in the rail sector is the Rail Market Monitoring Survey published annually by the European Commission, which has its own categories for these activities. As indicated in the reference note on metadata, methodology and quality of the survey, Rail Market Monitoring Survey data are covered by Directive 2012/34/EU ([1]), as amended by Directive (EU) 2016/2370 ([2]). Accordingly, a railway undertaking is defined as any public or private undertaking licensed according to Directive 2012/34/EU, the principal business of which is to provide services for the transport of goods and/or passengers by rail

([1]) Directive 2012/34/EU of the European Parliament and of the Council of 21 November 2012 establishing a single European railway area (recast) (OJ L 343, 14.12.2012, p. 32, ELI: http://data.europa.eu/eli/dir/2012/34/oj).

([2]) Directive (EU) 2016/2370 of the European Parliament and of the Council of 14 December 2016 amending Directive 2012/34/EU as regards the opening of the market for domestic passenger transport services by rail and the governance of the railway infrastructure (OJ L 352, 23.12.2016, p. 1, ELI: http://data.europa.eu/eli/dir/2016/2370/oj).

with a requirement that the undertaking ensure traction. This category also includes undertakings that provide traction only, while railway undertakings that only operate urban, suburban or regional services on local and regional stand-alone networks are excluded. In cases in which railway undertakings operate in more than one Member State, separate data are provided to the relevant national authority in each Member State in which they operate.

Across the data collected via the RMMS, reference is made to 'incumbent', 'main' and 'other' railway undertakings. The term 'incumbent railway undertaking' is used for the historically dominant, typically formerly state-owned, monopoly operators that usually hold the largest market share within a country, own or manage significant infrastructure, and have been the primary providers of both passenger and freight services for decades. The significant players in either passenger or freight rail transport that possess a substantial market share, even if they are not the historical incumbent are known as a 'main railway undertaking'. It is noteworthy that an incumbent railway undertaking can be the main one and vice versa. The newer, smaller, private operators that have entered the rail market more recently and cover a small share of it are called 'other railway undertakings'. The infrastructure manager is defined as the enterprise responsible for establishing, managing and maintaining railway infrastructure, including traffic management, control-command and signalling, and is also responsible for participating in railway infrastructure development as determined by the Member State within the framework of its general policy on the development and financing of infrastructure. All these categories will be used thorough the report.

The railway sector was originally organised as a form of state-controlled infrastructure for railways. Since 1991, EU rail legislation has encouraged competitiveness and market opening. Council Directive 91/440/EC ([3]) focused on breaking down rail networks' vertical integration by establishing distinct organisation entities for train service operations and infrastructure management.

Once most Member States had separated their track managers and service operators at the accounting level, two key directives promoting market liberalisation focused on licensing and infrastructure allocation. Council Directive 95/18/EC ([4]) specified a universal licensing process for new railway undertakings, while Council Directive 95/19/EC ([5]) provided the framework for fair charging and infrastructure capacity for railway undertakings.

> *Between 2001 and 2016, four legislative packages were adopted [by the European Commission] with the aim of gradually opening up rail transport service markets for competition, making national railway systems interoperable and defining appropriate framework conditions for the development of a single European railway area. These include charging and capacity allocation rules, common provisions on licensing of railway undertakings and train driver certification, safety requirements, the creation of the European Agency for railways and rail regulatory bodies in each Member State as well as rail passenger rights* (European Commission: Directorate-General for Mobility and Transport, undated (A)).

([3]) Council Directive 91/440/EEC of 29 July 1991 on the development of the Community's railways (OJ L 237, 24.8.1991, p. 25, ELI: http://data.europa.eu/eli/dir/1991/440/oj).

([4]) Council Directive 95/18/EC of 19 June 1995 on the licensing of railway undertakings (OJ L 143, 27.6.1995, p. 70, ELI: http://data.europa.eu/eli/dir/1995/18/oj).

([5]) Council Directive 95/19/EC of 19 June 1995 on the allocation of railway infrastructure capacity and the charging of infrastructure fees (OJ L 143, 27.6.1995, p. 75 ELI: http://data.europa.eu/eli/dir/1995/19/oj).

Recently, the European Commission adopted a set of proposals to speed up the roll-out of Europe's high-speed rail network and boost investment in renewable and low-carbon fuels for railways (European Commission: Directorate-General for Communication, 2025). The aim is for the EU railway system to be more efficient, interconnected and accessible, underpinned by the principles of competitiveness and sustainability.

As reported by the Network of Eurofound Correspondents during 2024, trends across the European railway sector reveal an industry undergoing significant transformation driven by technological advancement, sustainability initiatives and changing workforce demands ([6]). Many Member States are prioritising electrification, automation and the digitalisation of rail infrastructure, leading to the emergence of new specialist roles and the need for advanced technical skills (e.g. the Eurofound correspondents have reported such developments in Bulgaria, France, Greece and Spain) ([7]). Modernisation efforts are often coupled with measures to address labour shortages, such as dual education systems, partnerships with vocational schools and targeted recruitment approaches (e.g. as seen in Bulgaria and Slovenia). Investments in sustainability – particularly in decarbonisation, energy efficiency and the adoption of low-emission technologies – are widespread (e.g. the Eurofound correspondents have reported such developments in France, Romania, Spain and Sweden).These trends indicate a sector in transition, striving to balance technological progress, workforce renewal and the demands of a greener future.

This modernisation of the sector is resulting in changing job profiles and training needs ([8]). Member States like Croatia and Hungary demonstrate the emergence of roles such as digital signalling technicians, cybersecurity specialists and information technology professionals to support advanced railway technologies, while France and the Netherlands actively engage social partners in designing professional development programmes for new technical and commercial positions. In Ireland and Latvia, there is a clear emphasis on upskilling staff for new traffic management systems and high-speed rail projects, whereas Bulgaria focuses on dual vocational training to address persistent staff shortages. Meanwhile, Estonia and Sweden demonstrate gradual shifts, with existing roles adapting to technological advancements rather than entirely new positions emerging. Overall, these trends highlight a sector balancing workforce renewal, technological progress and environmental goals.

1.2. Railway sector workforce

Based on RMMS data, the railway sector in the EU (active in 25 Member States) employs 903 463 workers (see Table 2). It is noteworthy that, according to some of the national rail trade unions and companies consulted during the drafting of this report, the figures included in Table 2 appear to be underestimates, thus impacting the figure for the total EU workforce in this sector. This underestimation is because of the source of the workforce figures, specifically the European Commission's 2025 ninth monitoring report on the development of the rail market, which was chosen because it ensures the comparability and consistency of data between the Member States

([6]) No new or expanding activities were reported by the Eurofound correspondents for Denmark, Germany and Poland.

([7]) Throughout this chapter, example Member States are chosen to demonstrate specific developments at the national level. Due to different national contexts, the information was not collected in a comparable way in each Member State. Hence, these are to be treated solely as illustrative examples.

([8]) Although no such developments were reported by the Eurofound correspondents for Greece, Luxembourg and Slovenia.

due to the same methodology being used in each Member State. In Table 2, the figures provided by the national rail trade unions, employer organisations and companies during the evaluation phase of this study are listed in brackets. However, since these figures were provided for only some Member States, the calculation of the share of the EU workforce, that of the national workforce and that of the relative change compared with 2018 was done based on the figures from the European Commission's 2025 ninth monitoring report on the development of the rail market, to ensure comparability between Member States.

The Member States with the largest sectoral workforces, in absolute numbers, are France, Germany, Poland and Italy (in order of sectoral workforce size). These are followed by Romania, Hungary and Czechia. At the other end of the spectrum, Greece and Estonia each have fewer than 2 500 employees in the railway sector.

The railway sector workforce corresponds to 0.5 % of the total EU-25 workforce. As a proportion of total national workforces, the sector is most important in Luxembourg, France and Hungary. The sector's size is 0.1 % of the entire national workforce in Spain, Portugal and Greece.

The overall level of employment in the sector for the 25 Member States with data available declined slightly from around 923 000 to around 900 000 workers between 2018 and 2022. In relative terms, Lithuania, Latvia and Estonia saw the greatest declines in employment levels, followed by Slovakia and Spain. Conversely, Portugal saw by far the greatest increase in sectoral employment in the EU, followed by Ireland.

Table 2: Workforce of the railway sector, EU-25, 2022

Member State	Number of employees in the railway sector, 2022	Share of European sector workforce, 2022 (%)	Share of total national employment, 2022 (%)	Relative change in sector employment compared with 2018 (%)
EU-25	**903 463**	**100**	**0.5**	**– 2.1**
FR	264 021 (144 107)	29.2	0.9	– 1.4
DE	136 000 (estimated 300 000)	15.1	0.3	+ 7.5
PL	91 581	10.1	0.5	– 4.1
IT	72 214	8.0	0.3	+ 1.9
RO	40 010	4.4	0.5	– 6.3
HU	39 698	4.4	0.9	+ 1.0
CZ	39 173	4.3	0.8	– 4.2
AT	31 568	3.5	0.7	+ 5.1
BE	30 854 (28 321)	3.4	0.6	– 4.7
ES	26 049	2.9	0.1	– 10.5
NL	22 619	2.5	0.2	+ 0.4
BG	20 448	2.3	0.7	– 7.1
SK	19 836	2.2	0.8	– 23.6
SE	11 101	1.2	0.2	+ 2.5
DK	10 301	1.1	0.4	– 3.4
HR	8 925	1.0	0.6	+ 5.2
PT	6 479	0.7	0.1	+ 21.2
LV	6 339	0.7	0.8	– 38.2

Member State	Number of employees in the railway sector, 2022	Share of European sector workforce, 2022 (%)	Share of total national employment, 2022 (%)	Relative change in sector employment compared with 2018 (%)
LT	5 074	0.6	0.4	– 52.2
SI	4 735	0.5	0.5	– 2.5
FI	4 421	0.5	0.2	– 6.0
LU	4 158	0.5	1.3	+ 9.3
IE	4 127	0.5	0.2	+ 14.4
EL	2 300	0.3	0.1	+ 8.0
EE	1 432	0.2	0.2	– 28.7

Notes: Brackets used for figures provided by CER-affiliated companies during the evaluation phase of this study. In France, UTPF, which is the representative organisation for the railway sector, reported that the number of employees in the French railway sector in 2022 was 144 107. In Germany, the company Deutsche Bahn states that it employs around 220 000 workers. So, when including the employees of a further 300 smaller companies in the sector, the total number of workers in this sector in Germany could be around 300 000 to 350 000. In Austria, the workforce figure is likely to be underestimated, according to the trade union Vida. In Belgium, the employer organisation HR Rail provided the figure of 28 321 for the number of employees in the railway sector in 2026. In Slovakia, according to the CER members ŽSR, ZSSK and ZSSK Cargo, the three companies employ 22 977 employees. As this does not include the employees of other companies' undertakings in the railway sector, the RMMS figure might be an underestimate.

Sources: 2024 RMMS (European Commission: Directorate-General for Mobility and Transport, 2025) and Eurostat, European Union Labour Force Survey.

Over 500 000 railway sector workers in the EU-25 are employed in rail undertakings (see Table 3). Among them, around 400 000, or just over 80 %, are employed in main rail undertakings (either incumbent or other). The share of workers employed in main rail undertakings is especially high, at 100 %, in Estonia, France, Ireland and Luxembourg. In contrast, the share is lowest in Italy, Poland and Sweden.

Table 3: Total number of employees in rail undertakings (main and other) and the share of employees in main rail undertakings, EU-25, 2022

Member State	Total number of employees of rail undertakings	Employees of incumbent or other main rail undertakings	Share of employees in main rail undertakings (%)
AT	14 466	11 854	82
BE	21 504	19 270	90
BG	9 865	7 402	75
CZ	22 065	19 722	89
DE	89 100	61 500	69
DK	7 468	6 719	90
EE	678	678	100
EL	1 307	1 233	94
ES	14 428	11 273	78
FI	4 124	4 052	98
FR	144 107	144 107 (142 927)	100
HR	3 920	2 696	69
HU	23 191	15 949	69

Member State	Total number of employees of rail undertakings	Employees of incumbent or other main rail undertakings	Share of employees in main rail undertakings (%)
IE	2 209	2 209	100
IT	41 033	26 911	66
LT	2 621	2 566	98
LU	2 650	2 650	100
LV	2 375	2 078	87
NL	17 519	16 731	96
PL	52 647	24 821	47
PT	3 920	3 750	96
RO	14 612	14 362	98
SE	9 829	5 629	57
SI	2 663	2 449	92
SK	6 533	5 610	86
EU-25	**514 834**	**416 221**	**81**

Notes: According to some of the national rail trade unions and companies consulted during the drafting of this report, the figures for several Member States might be underestimated. In Austria, the workforce figure is likely to be underestimated, according to the trade union Vida. In Germany, the company Deutsche Bahn states that it employs around 220 000 workers. So, when including the employees of a further 300 smaller companies in the sector, the total number of workers in this sector in Germany could be around 300 000 to 350 000. For France, the number in brackets was provided by SNCF.

Source: 2024 RMMS (European Commission: Directorate-General for Mobility and Transport, 2025, Figures 91 and 92, respectively, for total employees and employees of incumbent or other main undertakings).

Another important feature of the sectoral workforce is the number of infrastructure managers and train drivers (see Table 4), as these are the two job categories for which data are available in the RMMS. Across the EU-25, in 2022, there were around 388 000 workers employed as infrastructure managers and around 123 000 employed as train drivers, based on the RMMS data used to allow comparisons between Member States. The numbers of infrastructure managers and train drivers were highest in France, Germany, Poland and Italy.

Table 4: Total number of employees working as infrastructure managers and train drivers, EU-25, 2022

Member State	Total number of employees of main and other rail undertakings	Total number of employees working as train drivers in main and other rail undertakings	Total number of employees working as infrastructure managers in main and other rail undertakings
AT	14 466	5 718	17 102
BE	21 504	3 856	9 350
BG	9 865	1 644	10 583
CZ	22 065	6 210	17 108
DE	89 100	34 200	46 900
DK	7 468	2 208	2 833
EE	678	180	754
EL	1 307	311	993
ES	14 428	6 726	11 621

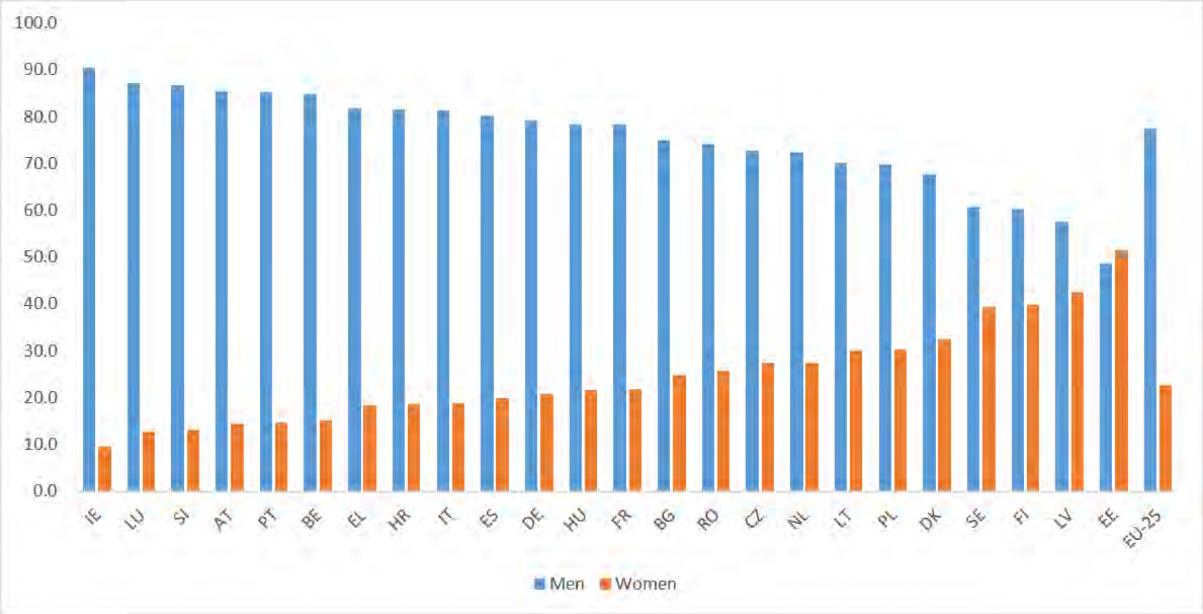
Member State	Total number of employees of main and other rail undertakings	Total number of employees working as train drivers in main and other rail undertakings	Total number of employees working as infrastructure managers in main and other rail undertakings
FI	4 124	1 183	297
FR	144 107	15 426	119 914 (56 124)
HR	3 920	1 182	5 005
HU	23 191	4 097	16 507
IE	2 209	610	1 918
IT	41 033	11 207	31 181
LT	2 621	553	2 453
LU	2 650	520	1 508
LV	2 375	531	3 964
NL	17 519	3 928	5 100
PL	52 647	13 352	38 934
PT	3 920	793	2 559
RO	14 612	2 627	25 398
SE	9 829	4 086	1 272
SI	2 663	995	2 072
SK	6 533	1 366	13 303
EU-25	**514 834**	**123 509**	**388 629**

Notes: According to some of the national rail trade unions and companies consulted during the drafting of this report, the figures for several Member States might be underestimated. In Austria, the workforce figure is likely to be underestimated, according to the trade union Vida. In Germany, the company Deutsche Bahn states that it employs around 220 000 workers. So, when including the employees of a further 300 smaller companies in the sector, the total number of workers in this sector in Germany could be around 300 000 to 350 000. In France, the CER affiliate SNCF noted that the RMMS figure might be inaccurate, as SNCF Réseau employs over 50 000 people (number in brackets).

Source: 2024 RMMS (European Commission: Directorate-General for Mobility and Transport, 2025, Figures 91, 94 and 90, respectively, for total employees, train drivers and infrastructure managers).

Most employees in the railway sector are men (see Figure 1). In 2022, 77 % of employees were men and only 23 % were women across the EU-25. The proportion of railway employees who are men is especially high in Ireland, Luxembourg, Slovenia, Austria, Portugal and Belgium. In contrast, the proportion is lowest in Sweden, Finland, Latvia and Estonia.

Figure 1: Share of total railway employees, by gender, EU-25, 2022 (%)



Notes: According to the information provided by the CER affiliate HR Rail, the gender distribution of railway employees in Belgium is 82 % men and 18% women in 2026. The Slovak CER affiliate ŽSR (an infrastructure manager) provided the following shares for Slovakia for 2025: 76 % men and 24% women.

Source: 2024 RMMS (European Commission: Directorate-General for Mobility and Transport, 2025, Figure 26).

The railway sector workforce is dominated by workers in the middle age bracket (30–50), who constitute the largest group of workers in the sector (47 %), followed closely by a significant proportion of employees aged over 50 (42 %), and a smaller share of young workers aged under 30 (11 %) (see Figure 2). Since 2018, these proportions have remained relatively stable.

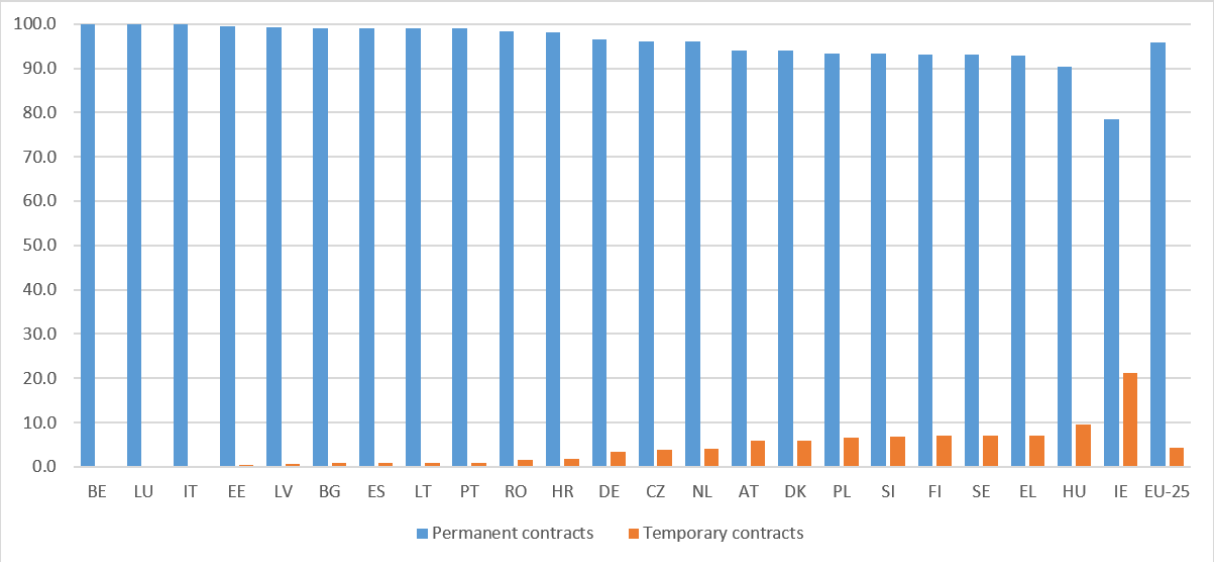
Figure 2: Total number of railway sector employees, by age group, EU-25, 2018–2022 (%)

Source: 2024 RMMS (European Commission: Directorate-General for Mobility and Transport, 2025, Figure 99).

In 2022, most employees in the railway sector had standard permanent full-time employment contracts (see Figure 3 and Figure 4). Across the EU-25, 96 % of sector employees had permanent employment contracts, and 98 % of sector employees had full-time employment contracts.

The proportion of permanent employment contracts is especially high, at 100 %, in Belgium and Luxembourg, while it is lowest in Greece, Hungary and Ireland. The proportion of full-time employment contracts is especially high, at 100 %, in Sweden, Portugal, the Netherlands and Greece, while it is lowest in Germany, Luxembourg and Belgium ([9]).

Figure 3: Share of employees with permanent or temporary contracts in the incumbent/main rail undertaking by Member State, EU-25, 2022 (%)

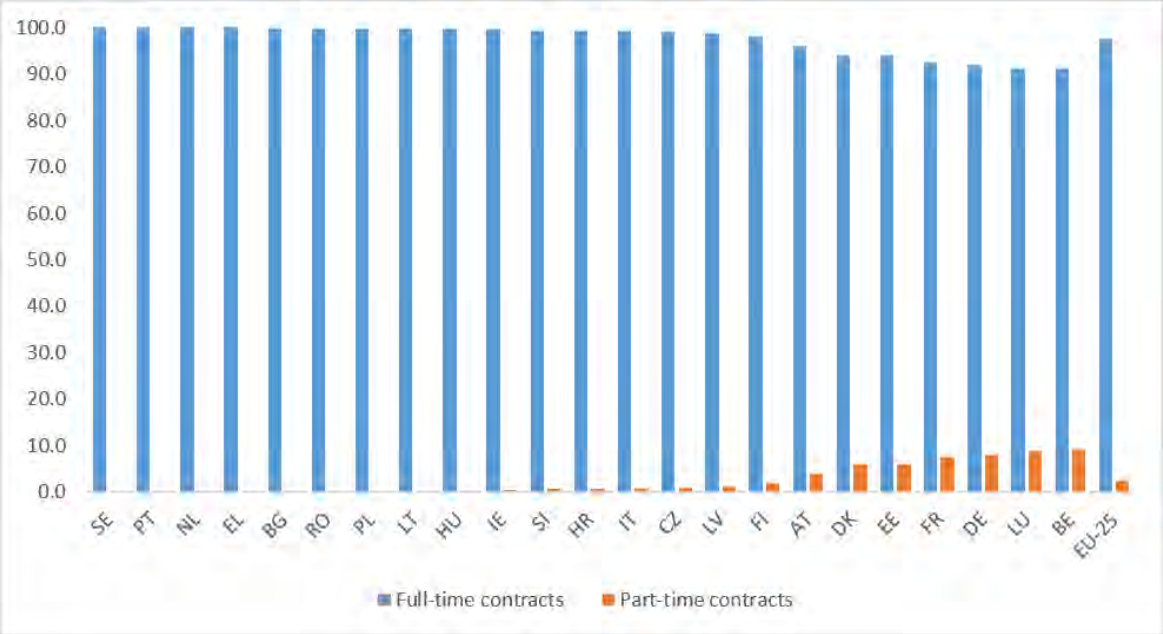


Note: No data were available for France.

Source: 2024 RMMS (European Commission: Directorate-General for Mobility and Transport, 2025, Figure 103).

([9]) According to ETF, the share of part-time work is higher in the sector in the Netherlands than reported here. The source of the data included in the figure and used throughout this report is the European Commission's 2025 ninth monitoring report on the development of the rail market, which was chosen to ensure the comparability and consistency of data between the Member States.

Figure 4: Share of employees with full- or part-time contract, by Member State, EU-25, 2022 (%)



Source: 2024 RMMS (European Commission: Directorate-General for Mobility and Transport, 2025, Figure 104).

The evidence from the EU-25 reported by the Network of Eurofound Correspondents reveals a clear, ongoing shift towards higher educational attainment among railway sector employees. The dominant level of skills and education in the railway sector is the middle vocational level, corresponding to International Standard Classification of Education (ISCED) educational attainment levels 2–4. This is the case in most Member States for which data are available (no information on this aspect was reported from Austria or Portugal). An increasing number of railway workers now hold at least a secondary or vocational education, with a notable and growing proportion acquiring tertiary, university-level qualifications. This trend is particularly pronounced in Member States such as Italy, the Netherlands and Poland, where the number of employees with higher education is consistently rising. Automation and technological modernisation appear to be driving forces behind this development, as they require an increasingly skilled workforce able to adapt to new roles and responsibilities. In some Member States, such as Bulgaria and Romania, low-skilled positions have nearly disappeared entirely, while automation and updated vocational curricula ensure that workers are equipped for the demands of the modern railway industry. The general picture is one of upskilling, as roles like train driver and technical staff increasingly require post-secondary or specialised training. Overall, the EU railway sector is experiencing a marked professionalisation, with education levels rising across the board to meet the challenges of a rapidly changing industry.

Eurofound correspondents in a number of Member States have reported changes in recent years in the education of workers in the railway sector; these changes have affected the availability of skilled workers in the railway sector in these Member States. No changes in this respect were reported in Finland, Latvia, Portugal, Slovenia, Spain or Sweden. Shifts in the education and training landscape of the EU railway sector, as reported by workers, have been driven by technological advancement, labour shortages and the need to align skills with the modern rail demand for climate-friendly services. For instance, Austria has expanded training for railway workers and introduced new specialist roles, while Belgium faces persistent shortages of skilled personnel, leading to regular

recruitment campaigns. Railway sector employers in Croatia, France and Germany have heavily invested in training for railway workers. In Germany, new certified vocational rail training was introduced at Deutsche Bahn and old training was overhauled to include digital advancements. In France, according to the UTP's 2022 social report, the expenditure on training doubled in 2022 compared with 2018 (UTPF, 2023). In Croatia, green competencies were integrated into the railways' vocational standards. Other Member States, such as Czechia, Estonia and Poland, have created dedicated rail education institutions and scholarship programmes. In the Netherlands, automation and the introduction of new technical specialisations are attracting a younger, more skilled workforce. Conversely, Bulgaria and Slovakia report growing shortages due to the closure of railway schools and insufficient numbers of graduates, respectively, underscoring the diverse challenges and strategies found across the EU as the sector modernises and professionalises.

1.3. Railway sector companies

According to the RRMS data on the number of active licences ([10]), there are around 1 200 companies operating in the EU railway sector (see Table 5). Table 5 includes a column listing the numbers of companies in the railway sector, provided by CER members. This is less than 0.1 % of the total number of enterprises in the 25 Member States covered in this study.

The Member States with the highest absolute numbers of railway sector companies are Germany, Poland and Czechia (in descending order of number of sectoral companies). These are followed by Sweden, Hungary and the Netherlands. At the other end of the spectrum, Greece, Ireland and Luxembourg each have fewer than five companies in the railway sector.

A comparison of company development against the 2017 representativeness study (Eurofound, 2017) is not possible, since the previous study did not report specific company numbers.

Table 5: Railway sector companies (based on number of active rail licences), EU-25, 2022

Member State	Number of companies in the railway sector	Share of EU railway sector companies (%)	Share of total national number of companies (%)
EU-25	**1 202**	**100**	-
AT	41	3	0.007
BE	9	1	0.001
BG	18	1	0.005
CZ	109	9	0.008
DE	490	41	0.016
DK	10	1	0.003
EE	15	1	0.011
EL	3	0.2	0.000
ES	38	3	0.001

([10]) It is likely that this underestimates the number of companies in the sector, especially those falling under NACE Rev. 2.1 code 52.3 (intermediation service activities for transportation). However, the RMMS provides data for all 25 Member States covered in this report. Structural business statistics (SBS) data from Eurostat (2026) do not cover Bulgaria, Greece, Hungary or Ireland. The total number of enterprises reported in the SBS data for the countries available across Europe was 1 014 in 2022, which is comparable to the RMMS data reporting 1 200 companies for the 25 Member States covered here.

Member State	Number of companies in the railway sector	Share of EU railway sector companies (%)	Share of total national number of companies (%)
FI	5	0.4	0.001
FR	34	3	0.001
HR	14	1	0.006
HU	49	4	0.005
IE	3	0.2	0.001
IT	39	3	0.001
LT	8	1	0.002
LU	2	0.2	0.004
LV	6	0.5	0.004
NL	46	4	0.002
PL	126	10	0.005
PT	5	0.4	0.000
RO	34	3	0.003
SE	58	5	0.007
SI	8	1	0.004
SK	32 ([11])	3	0.005

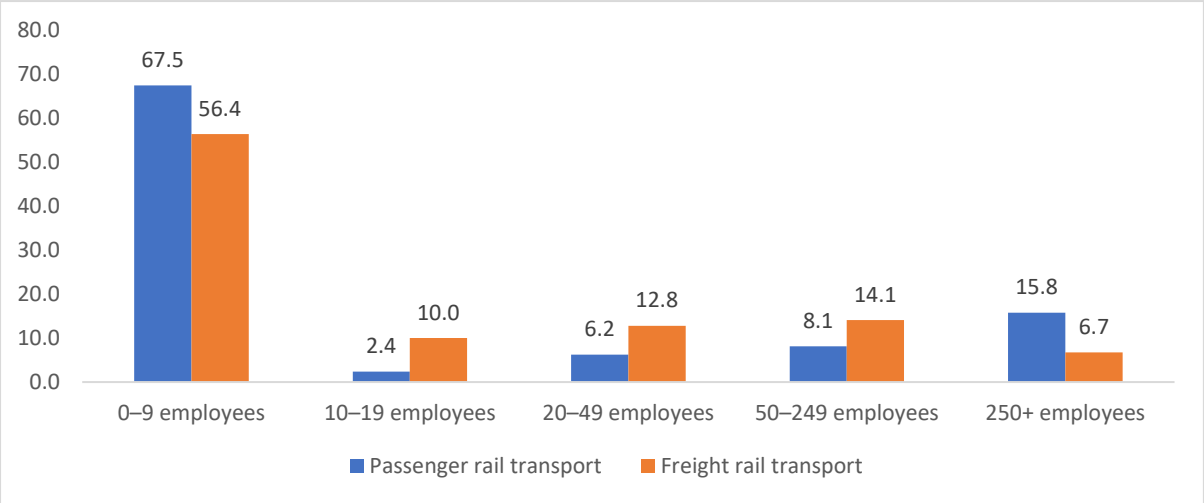
Sources: 2024 RMMS (European Commission: Directorate-General for Mobility and Transport, 2025, Figure 53) and Eurostat (sbs_sc_ovw).

The process of liberalisation fostered by EU regulation in the railway sector has translated into a growing number of operators delivering railway services. Although the sector is still dominated by large companies, the number of smaller operators has grown in recent years. As seen in Figure 5a, in both passenger and freight rail, most companies (68 % in passenger and 56 % in freight rail) are small, with 0–9 employees. In contrast, the proportion of very large companies (employing 250 or more employees) is smaller: 16 % of passenger rail companies and 7 % of freight rail companies.

The effects of this process, with more market players emerging, are reported by Eurofound correspondents from Belgium, Germany, Italy, the Netherlands, Spain and Sweden. However, in terms of the proportion of the workforce employed, almost the entire workforce (99 %) is employed by large companies in both passenger and freight rail transport, as Figure 5b shows.

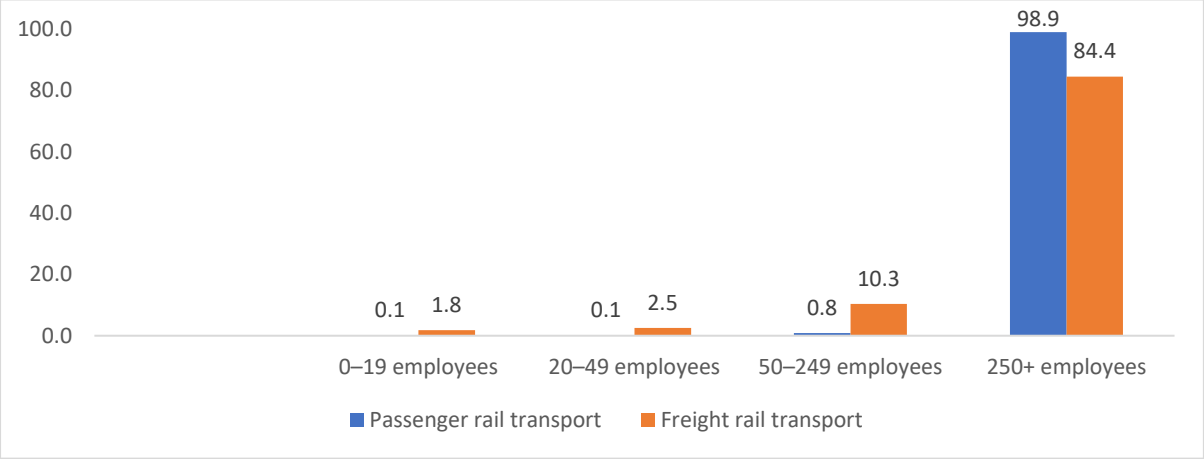
([11]) According to a CER affiliate, this number could be an underestimate. The Slovak CER affiliate indicates that there are 50 companies (49 railway carriers (passenger and freight) and ŽSR as the infrastructure manager). At the same time, to ensure the comparability and consistency of data between the Member States, the report uses data from the European Commission's 2025 ninth monitoring report on the development of the rail market.

Figure 5a: Proportion of companies, by company size, in passenger and freight rail transport, EU-25, 2022 (%)



Source: Eurostat (sbs_sc_ovw).

Figure 5b: Proportion of railway workforce employed, by company size group, in passenger and freight rail transport, EU-25, 2022 (%)



Source: Eurostat (sbs_sc_ovw).

In Belgium, for instance, all the different aspects of railway transport (except for infrastructure) have been opened up to the commercial market over time, including inland passenger transport. Some parts of the sector now have active private players, mainly in cargo transport and international travel.

In Germany, Deutsche Bahn remains one of the single largest providers for long-distance railway services. However, between 1994 and 2000, further reform steps were taken, and private operators were allowed to enter the market. According to the most recent Federal Network Agency monitoring report, the market share held by Deutsche Bahn in 2025 was 86 % for passenger rail transport, which it still dominates, and 42 % for freight rail transport (Bundesnetzagentur and Bundeskartellamt, 2026). Another relevant example is Italy, where the railway market has become heterogeneous. The historically dominant provider FSI Group has seen its railway companies (Trenitalia for passenger transport and Mercitalia Rail for freight transport) transform from monopolists to players in a market composed of multiple entities. Currently, Trenitalia's main competitor is Italo NTV. The

privatisation and fragmentation of the sector is also evident in the freight rail sector, where Mercitalia Rail is just one of approximately 40 companies operating in the sector.

In the Netherlands, NS, the main passenger rail operator, holds the primary contract for the main network, while regional and freight services are open to private operators. In passenger services, NS (publicly owned) operates most main routes, while private companies like Arriva and Keolis handle regional routes. Freight is fully liberalised and primarily operated by private firms.

Similarly, in Spain, other companies have entered the sector as independent private operators in freight and passenger services. In 2020, passenger services in the high-speed railway sector underwent a liberalisation process, and some companies started to operate in Spain (e.g. Ouigo and Trenitalia). Freight services were liberalised earlier, and various private freight companies now operate in Spain alongside Renfe's freight division. The freight market is more diversified, with multiple private operators managing short- and long-haul freight transport. As of 2023, around 55 % of the tonnes per kilometre of goods transported was handled by private companies.

In Sweden, since 1996, freight traffic has been deregulated and liberalised. The market share held by private companies in goods transport is about 35 %. In 2010, the market for passenger transport by railway was opened up completely. There are 18 train operators for passenger traffic in Sweden, but the market is still dominated by SJ AB (the state-owned enterprise and former monopolist).

1.4. National sectoral trade unions and employer organisations and their collective bargaining coverage

This study has identified 137 sectoral trade unions and 35 employer organisations in the railway sector across the 25 Member States covered (see Table 6). Trade unions organising workers in the railway sector can be found in all 25 Member States covered. National sectoral employer organisations exist in 17 Member States (all except for Bulgaria, Croatia, Estonia, Greece, Ireland, Latvia, Luxembourg and the Netherlands). Full lists of these organisations are included in the Annex (see Tables 63 and 64).

Table 6: Numbers of national sectoral trade unions and employer organisations, EU-25, 2024

Number of trade unions	Member State	Number of employer organisations
1	AT	1
9	BE	2
5 ([12])	BG	0
13	CZ	2
3 ([13])	DE	4
7	DK	2
2	EE	0
4	EL	0

([12]) The ETF affiliate СТСБ has pointed out that СЛПБ is not a separate union and is part of СЖБ, which signs the collective agreements. However, СЛПБ is also a member of the Federation of European Train Drivers' Unions (ALE) and was therefore included in the study as a separate organisation.

([13]) In Germany, there are two main trade unions: EVG and GDL. A third union, ver.di, has a smaller presence in the sector; however, since it covers the sector, it is included in the study. While ver.di is the dominant union for the urban public transport sector, it also represents around 1 200 members in the railway sector.

Number of trade unions	Member State	Number of employer organisations
8	ES	2
4	FI	1
6	FR	2
5	HR	0
3	HU	1
5	IE	0
8	IT	4
2	LT	1
3	LU	0
1	LV	0
5	NL	0
3	PL	5
17	PT	1
5	RO	2
6	SE	2
9	SI	1
3 ([14])	SK	2
137	**EU-25**	**35**

Source: Network of Eurofound Correspondents.

In total, 128 national-level trade unions and 18 employer organisations are involved in collective bargaining (at any level) in the railway sector (see Table 7 and Tables 64 and 65 in the Annex for the full lists). Among the sectoral trade unions, in Luxembourg, the Netherlands, Poland and Sweden, there is one trade union that is not involved in collective bargaining; in Greece, two out of four unions are not involved in any bargaining; in Belgium, three out of nine unions report no involvement.

Among the employer organisations, one employer organisation is not involved in sector-related collective bargaining in Denmark, Portugal and Slovenia; two employer organisations are not involved in Czechia, Germany, Italy, Romania and Slovakia; and four are not involved in Poland.

([14]) The CER affiliate ŽSR noted that, in 2024, 16 trade unions were actively organising the workers of ŽSR.

Table 7: Number of national sectoral trade unions and employer organisations involved in collective bargaining, EU-25, 2024

Number of trade unions	Member State	Number of employer organisations
1	AT	1
6	BE	2
5 ([15])	BG	0
13	CZ	0
3 ([16])	DE	2
7	DK	1
2	EE	0
2	EL	0
8	ES	2
4	FI	1
6	FR	2
5	HR	0
3	HU	0
5	IE	0
8	IT	2
2	LT	1
2	LU	0
1	LV	0
4	NL	0
2	PL	1
17	PT	0
5	RO	0
5	SE	2
9	SI	0
3 ([17])	SK	0
128	**EU-25**	**17**

Source: Network of Eurofound Correspondents.

1.5. Changes in the industrial relations landscape at the national level

This section compares the findings of the previous representativeness study (Eurofound, 2017) with the findings in the current report to capture the situation in terms of national trade unions and employer organisations (see Table 8). One important element, also captured in the previous representativeness study, is the liberalisation of the rail market, with freight railway transport liberalisation finalised in 2007 and international passenger railway transport liberalisation starting in 2010 (European Commission: Directorate-General for Mobility and Transport, undated (B)). This process has led to new operators entering the rail market, which in some cases has translated into new social partner organisations representing these new employers and their workforces. It must be noted that the 2017 study covered both railways and urban public transport activities, which is not

([15]) The ETF affiliate СТСБ has pointed out that СЛПБ is not a separate union and is part of the СЖБ, which signs the collective agreements. However, СЛПБ is also involved in collective bargaining in the railway sector at the company level and is also a member of ALE and was therefore included in the study as a separate organisation.

([16]) In Germany, there are two main trade unions: EVG and GDL. A third union, ver.di, has a smaller presence in the sector; however, since it covers the sector, it is included in the study. While ver.di is the dominant union for the urban public transport sector, it also represents around 1 200 members in the railway sector.

([17]) The CER affiliate ŽSR noted that, in 2024, 16 trade unions were actively organising the workers of ŽSR.

the case in the current study. For this reason, only organisations covering railway sector activities are considered from the 2017 study. In this context, the recent representativeness study covering the social partner landscape in urban public transport together with road transport is relevant, as it covers the railway part of public transport activities (Eurofound, 2024).

1.5.1. Trade unions

The number of trade unions identified has increased from 113 in 2017 to 137 in 2024. The largest increases in the number of unions organising workers in the sector were noted in Czechia and Portugal. These changes might be explained by the use of a slightly different screening methodology in 2024 and the coverage of only railway transport activities during the data collection stage in 2024, whereas in 2017 the study covered railways and urban public transport activities. Additionally, according to the Eurofound correspondent from Portugal, there are minimal formal requirements in Portuguese legislation regarding forming a union. Furthermore, national legislation allows for the participation of all unions in collective bargaining, with no representativeness threshold related to size, instead representativeness is based solely on mutual recognition by the employer. As a result, numerous trade unions have emerged across sectors, including the railway sector. The same criterion of requiring solely mutual recognition by an employer applies in Czechia for unions willing to enter collective bargaining processes. The Eurofound correspondents from these two Member States explain that, in sectors dominated by large companies, as is the case with big operators in rail transport, this has led to the appearance of new unions, most of which are still rather small.

Despite this overall increase, reductions have also occurred in the number of trade unions in some Member States. This is mainly due to some unions no longer organising workers in the sector, structural changes such as union mergers taking place or unions ceasing to exist. These changes have been explained by the Eurofound national correspondents from some Member States.

In Germany, the previous representativeness study mentioned DBB separately from GDL. GDL is a member of the umbrella organisation DBB. As DBB does not organise other members in the railway sector, GDL is included in the current study. In Finland, in 2018, two unions – RVL and VML – merged into a single union: RAU. In France, in the 2017 study, due to the inclusion of urban public transport activities, sectoral branches of two federations were counted as separate trade unions: UNSA-Transport and UNSA-Ferroviaire. So were the two sectoral branches of CGT: CGT-Cheminots and CGT-Transport. In the current study, only the branches organising rail workers are included.

In Hungary, the unions GYDSZSZ and KSZOSZ were mentioned in the previous representativeness study but are not included in the current one. GYDSZSZ is a company-level union (organising workers employed by GYSEV) that declined to participate in this study. KSZOSZ is a trade union organising workers active mainly in urban public transport and thus has not been included in this study. Two of the unions included in the previous study were part of the same confederation: VDSZSZ, organising around 700 members in the urban public transport at the time, and the confederation VDSZSZ Solidarity, with almost 8 000 members in rail and other transport activities at the time. In the current study, only VDSZSZ is included. Finally, the trade union MTSZSZ was included in the previous study, but no longer organises workers in the railway sector and only has members in information technology and other industrial sectors.

In Italy, UGL TPL and UGL TFA are now part of the union UGL Ferrovieri. In Lithuania, LTF no longer exists and its members are now represented by LGPSS. LVPS does not have members in the railway sector, as it represents workers in the freight road transport sector. In Luxembourg, ACAL still exists

but is no longer responsible for the railway sector. In Slovenia, SPS is no longer active, while SŽPD is now named SŽPS.

Table 8: Number of national sectoral trade unions, EU-25, 2017 and 2024

Member State	Number in 2024	Number in 2017	Difference
AT	1	1	0
BE	9	7	+ 2
BG	5 ([18])	4	+ 1
CZ	13	1	+ 12
DE	3 ([19])	4	– 1
DK	7	6	+ 1
EE	2	2	0
EL	4	1	+ 3
ES	8	7	+ 1
FI	4	5	– 1
FR	6	8	– 2
HR	5	4	+ 1
HU	3	7	– 4
IE	5	5	0
IT	8	9	– 1
LT	2	3	– 1
LU	3	4	– 1
LV	1	1	0
NL	5	5	0
PL	3	3	0
PT	17	4	+ 13
RO	5	4	+ 1
SE	6	6	0
SI	9	10	– 1
SK	3	2	+ 1
EU-25	**137**	**113**	**+ 24**

Notes: The trade unions discussed in 2017 were included if they covered the railway sector NACE codes. Trade unions only organising in the urban transport activities sector were excluded from the count.

Source: Network of Eurofound Correspondents.

1.5.2. Employer organisations

The number of employer organisations identified also significantly increased between 2017 and 2024, from 23 to 35 (see Table 9). This increase is partly explained by Member States like Belgium, Hungary, Lithuania, Portugal, Slovakia and Slovenia, which had no employer organisations in the railway sector at the time of drafting the previous representativeness study but now have employer

([18]) The ETF affiliate СТСБ has pointed out that СЛПБ is not a separate union and is part of СЖБ, which signs the collective agreements. However, СЛПБ is also a member of ALE and was therefore included in the study as a separate organisation.

([19]) In Germany, there are two main trade unions: EVG and GDL. A third union, ver.di, has a smaller presence in the sector; however, since it covers the sector, it is included in the study. While ver.di is the dominant union for the urban public transport sector, it also represents around 1 200 members in the railway sector.

organisations in the sector. There are also Member States in which the number of employer organisations increased, such as Czechia, France, Poland and Romania. At the same time, Latvia and the Netherlands recorded decreases. Such changes have occurred mostly due to structural factors, such as organisations ceasing to exist. For instance, in Latvia, the employer organisation included in the 2017 study (LDZDDO) was going through a liquidation process at the time of drafting of this report and was not included in this study. In the Netherlands, the employer organisations WMO and VWOV included in the previous study were reported as covering urban public transport, not the railway sector. KNV Spoorgoederenvervoer from the Netherlands ceased to exist in 2019.

Table 9: Number of national sectoral employer organisations, EU-25, 2017 and 2024

Member State	Number in 2024	Number in 2017	Difference
AT	1	1	0
BE	2	0	+ 2
BG	0	0	0
CZ	2	1	+ 1
DE	4	4	0
DK	2	1	+ 1
EE	0	0	0
EL	0	0	0
ES	2	1	+ 1
FI	1	1	0
FR	2	1	+ 1
HR	0	0	0
HU	1	0	+ 1
IE	0	0	0
IT	4	4	0
LT	1	0	+ 1
LU	0	0	0
LV	0	1	– 1
NL	0	4	– 4
PL	5	1	+ 4
PT	1	0	+ 1
RO	2	1	+ 1
SE	2	2	0
SI	1	0	+ 1
SK	2	0	+ 2
EU-25	**35**	**23**	**+ 12**

Notes: The employer organisations discussed in 2017 were included if they covered the railway sector NACE codes. Organisations only organising in the urban transport activities sector were excluded from the count.

Source: Network of Eurofound Correspondents.

2. European sectoral social dialogue for the railway sector

An ESSDC for the railway sector was established in 1998, following over a decade of cooperation between ETF on the trade union side and CER on the employer side. The railway ESSDC is one the most active and productive committees, with around 60 joint texts, recommendations, opinions and agreements produced. The full list of joint opinions and agreements is available in Table 65 in the Annex. Since May 2006, EIM ([20]) has co-signed some of the joint outputs of the committee on the employer side, alongside CER. It is noteworthy that, since June 2012, most of the joint texts published by the ESSDC for the railway sector have mentioned CER and ETF but not EIM.

In their joint text from 2007 ([21]), the social partners CER, EIM and ETF established the committee's rules of procedures. Some of the committee's main objectives were to advise the European Commission on social policy initiatives affecting the railway sector and to promote and develop social dialogue to improve employment and working conditions in the sector.

Table 65 shows a robust picture of collaboration, adaptation and policy evolution within the European railway ESSDC over the past two decades. It highlights a recurring dedication to social dialogue, working conditions and gender equality, reflected in the steady stream of joint opinions, autonomous agreements and follow-up reports. Notably, the ESSDC has been responsive to external pressures – such as demographic changes, the COVID-19 pandemic and the push for sustainability – demonstrating a readiness to address contemporary challenges through joint social partner declarations and recommendations.

A closer look reveals that health and safety, economic policies and the social protection of staff are persistent priorities. The ESSDC's progression from foundational agreements on working conditions and social dialogue to more specialised guidelines – such as those tackling psychosocial risks and third-party violence – indicates a sector increasingly attuned to nuanced workforce needs. Overall, the outputs of this ESSDC not only chart the sector's responses to legislative and societal stimuli but also underscore the strategic role of social partnership in steering the evolution of European railways.

Key highlights from the railway ESSDC include the following. In 2004, the social partners ETF and CER reached an agreement on working conditions for mobile workers assigned to cross-border interoperable services, later implemented as Council Directive 2005/47/EC ([22]). In the same year, the

([20]) CER members include railway operators, infrastructure managers and at least one locomotive leasing company (Mitsui) but also business federations.

([21]) https://ec.europa.eu/social/main.jsp?iframe=true&catId=521&langId=en&agreementId=175.

([22]) Directorate-General for Employment, Social Affairs and Inclusion (undated); Council Directive 2005/47/EC of 18 July 2005 on the agreement between the Community of European railways (CER) and the European Transport Federation (ETF) on certain aspects of the working conditions of mobile workers engaged in interoperable cross-border services in the railway sector (OJ L 195, 27.7.2005, p. 15 ELI: http://data.europa.eu/eli/dir/2005/47/oj).

social partners reached another agreement on a European train driver's licence, which served as a basis for the preparation of Directive 2007/59/EC (the Train Drivers Directive) ([23]).

A core activity of the railway ESSDC relates to the promotion of gender equality in the sector, which has traditionally had a male-dominated workforce. The social partners regularly carry out member surveys on gender diversity in the railway sector. A recent milestone in this respect was the Women in Rail (WiR) Agreement (European Social Partner Agreement on Women in Rail, 2021). The WiR Agreement, signed on 5 November 2021, is a landmark autonomous agreement, as it is the first binding gender equality agreement in any EU sector, making it a historic step for workplace inclusion in railways. The agreement sets out 10 articles and eight policy areas aimed at improving gender equality across the railway sector. This agreement aims to attract more women to the railway sector, give women more protection and guarantee equal treatment in the workplace thanks to measures agreed under the general gender equality policy. The policy covers areas such as how to attract more women to the sector, reconciling work and private life, promotion and career development, equal pay, health and safety, work environment and the prevention of sexual harassment and sexism.

The latest implementation report reviewing the progress of the WiR Agreement (L&R Social Research, 2025) presented the current state of gender equality within European railway companies following the signing of the WiR Agreement. The report identified both areas of progress and where further improvements are needed. It showed that 23 % of sector employees are women, and women make up 25 % of new hires, an increase from 21 % of all sector employees in 2018. Also, 80 % of companies surveyed have adopted a company policy that includes a commitment to gender equality.

Another core railway ESDDC activity relates to the cross-border dimension of railway services. The social partners produced a follow-up report on the agreement on the working conditions of mobile workers assigned to cross-border services (CER et al., 2019).

Most recently, in 2025, the social partners issued a joint statement emphasising the pivotal role of rail freight in Europe's transition to a sustainable and efficient transport system ([24]). It highlights the importance of focusing on key areas to ensure the future success and competitiveness of rail freight in the EU. On 22 March 2023, the social partners adopted a joint recommendation on the revision of the Train Drivers Directive. This followed a joint statement published in December 2022 to reinforce the social partners' position with regard to the revision of this important legislation for the sector.

The social partners work on joint projects and monitor the implementation of their recommendations and joint agreements. For example, a joint project concluded in 2022 on the topic of employability in the railway sector in light of digitalisation and automation (CER et al., 2022). It explored how to maintain employability in the face of the digital transition, with the human factor taking centre stage. The project developed a classification for a modernised conception of employability; key principles based on good existing practices, necessary for planning and developing digital transformation projects; and a non-exhaustive list of company- and sector-level policies that should be implemented to strengthen employability.

([23]) Directorate-General for Employment, Social Affairs and Inclusion (undated); Directive 2007/59/EC of the European Parliament and of the Council of 23 October 2007 on the certification of train drivers operating locomotives and trains on the railway system in the Community (OJ L 315, 3.12.2007, p. 51 ELI: http://data.europa.eu/eli/dir/2007/59/oj).

([24]) https://www.etf-europe.org/news/transforming-rail-freight-joint-call-sustainable-and-efficient-transport.

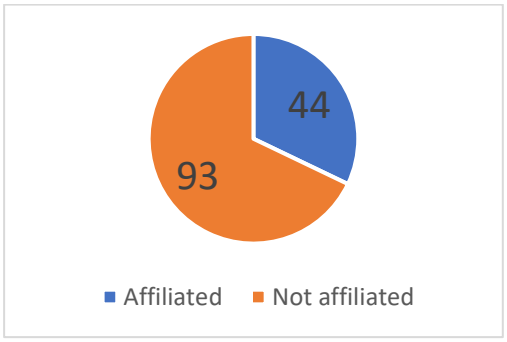
The key challenges in the sector, according to the railway ESSDC's website, relate to attracting new staff and passengers, managing an ageing workforce, recruiting younger people, improving passenger and staff safety through requiring qualifications for safety-responsible staff and monitoring driving times. The railway ESSDC also closely follows up on Commission initiatives, such as the fourth railway package (see European Commission: Directorate-General for Mobility and Transport, undated (A)), the decarbonisation of rail transport – Shift2Rail ([25]), the response to automation and digitalisation in the sector and the amendment of the Train Drivers Directive.

([25]) https://rail-research.europa.eu/about-shift2rail/.

3. European Transport Federation (ETF)

The membership-based representativeness of ETF is summarised in the scoreboard (see Figure 6). In total, 44 trade unions are affiliated to ETF's railway section in 22 Member States (there are no ETF affiliates in Estonia, Portugal or Romania). This represents 32 % of the 137 total trade unions organising workers in the railway sector in 25 Member States.

Figure 6: Scoreboard of the representativeness of ETF in the railway sector, EU-25, 2024

44 railway sector trade unions are affiliated to ETF (32 %)	ETF has at least one member union in 22 Member States		
	**AT**	FI	NL
	BE	FR	PL
	BG	HR	PT
	CZ	HU	RO
	DE	IE	SE
	DK	IT	SI
	EE	LT	SK
	EL	**LU**	
	ES	**LV**	

Notes: The blue part of the chart corresponds to the number of sectoral trade unions affiliated to ETF out of the total number of unions in the sector. Blue-shaded cells indicate Member States in which ETF has at least one affiliated sectoral trade union. Bold font indicates Member States in which all sectoral trade unions are affiliated to ETF. Cells with no shading indicate Member States in which none of the sectoral trade unions are affiliated to ETF.

Source: Network of Eurofound Correspondents.

Of the employees in the railway sector in Europe, 640 053 are reported to be affiliated to a sectoral trade union. This is based on estimates from experts and membership information provided by 102 of the 137 sectoral trade unions and is, therefore, probably an underestimate. The trade unions affiliated to ETF report that they have 486 554 affiliated sectoral employees (this was reported by 38 out of 44 trade union affiliates and thus is probably also an underestimate; see Table 10). This corresponds to 76 % of all 640 053 trade union members, around 41 % of the train drivers and 54 % of the entire European sectoral workforce (of 903 463 workers).

In three countries, all sectoral trade unions are affiliated to ETF, namely Austria and Latvia (where a single sectoral trade union exists) and Luxembourg (where all three sectoral trade unions are affiliated to ETF). In these countries, there are at least 42 065 employees ([26]) in the sector, which is 4.7 % of the EU sectoral workforce. ETF affiliates in this group have 47 659 affiliated sectoral

([26]) Based on sectoral workforce numbers reported in Section 1, Table 2 (Austria 31 568, Latvia 6 339 and Luxembourg 4 158 workers). As noted in Table 2, the workforce numbers for Austria are likely to be underestimated, according to the ETF affiliate. The source of the employment data used in the report is the European Commission's 2025 ninth monitoring report on the development of rail market (RMMS), as it ensures the comparability and consistency of data between the Member States.

employees in these countries, corresponding to a density of around 100 % of the sectoral workforce in these countries.

The three Member States where no sectoral trade unions are affiliated to ETF are Estonia, Portugal and Romania. In these three countries, there are 47 921 employees in the sector, which is 5.3 % of the EU sectoral workforce. All trade unions together have 39 217 affiliated sectoral employees in these countries, corresponding to a density of 82 % of the sectoral workforce in these countries.

In the remaining 19 Member States, some trade unions are affiliated to ETF, while other trade unions are not. In these 19 Member States, 813 477 persons are employed, or 90 % of the EU sectoral workforce. The trade unions affiliated to ETF from those 19 Member States reported 404 985 affiliated sectoral employees altogether. This is 77 % of all employees affiliated to a trade union in those countries, and 50 % of the sectoral workforce in those countries.

In 19 Member States, ETF affiliates are the largest railway sector trade union in the country (i.e. in all countries except Bulgaria, the Netherlands and Poland). In 10 Member States, the second largest railway sector trade union is affiliated to ETF (in Belgium, Bulgaria, Denmark, Finland, France, Hungary, Italy, Luxembourg, Poland and Spain). In eight Member States (Belgium, Denmark, Finland, France, Hungary, Italy, Luxembourg and Spain), ETF affiliates are both the largest and second largest trade unions in the country.

Table 10 provides information about the number of ETF-affiliated trade unions in relation to the overall number of unions representing workers in the sector at the national level. It also indicates whether the largest and second largest unions are affiliated to ETF. As well showing the number of ETF-affiliated trade union members in the country compared to the number of members in all sectoral trade unions, it calculates the trade union density of ETF-affiliated unions using national sectoral workforce data.

In some countries, for example Germany, Greece, Finland, Luxembourg and Sweden, this density exceeds 100 % (and is listed in italics in the table). This could be due to unions organising workers beyond the railway sector and being unable to provide disaggregated data or because membership data are overestimated when compared to the railway workforce registered at the national level.

Bearing this in mind, the highest density of ETF affiliates is recorded in Austria, Germany, Greece, Finland, Latvia, Luxembourg, Spain and Sweden.

Table 10: Membership strength of the sectoral trade unions affiliated to ETF, EU-25, 2024

Member State	ETF-affiliated trade unions/ total number of trade unions	Including the largest trade union?	Including the second largest trade union?	Number of sectoral trade union members in the country	Number of ETF-affiliated trade union members	Trade union density of the ETF-affiliated trade union in the sectoral workforce (%)	Notes
AT	1/1	Only 1 trade union	Only 1 union in the sector	33 000	33 000	100	
BE	4/9	Yes	Yes	9 500	9 500	n.d. ([27])	No data on 8 trade unions
BG	2/5	No	Yes	20 228	2 559	13	
CZ	1/13	Yes	No	40 175 ([28])	30 670	76	
DE	2/3	Yes	No	221 200 ([29])	181 200	*133*	
DK	3/7	Yes	Yes	9 562	8 500	89	
EE	0/2	No	No	512	–	0	
EL	1/4	Yes	No	4 776	3 200	*139*	
ES	3/8	Yes	Yes	39 500	26 000	100	
FI	2/4	Yes	Yes	5 100	4 500	*102*	
FR	5/6	Yes	Yes	57 900	57 000	22	No data on 2 trade unions
HR	2/5	Yes	No	8 500	3 400	38	
HU	2/3	Yes	Yes	19 400	15 400	39	
IE	1/5	Yes	No	3 250	1 904	46	No data on 2 trade unions
IT	3/8	Yes	Yes	65 000	45 000	69	No data on 6 trade unions
LT	1/2	Yes	No	1 480	1 100	22	
LU	3/3	Yes	Yes	8 400	8 400	*202*	
LV	1/1	Yes	No	6 259	6 259	99	
NL	2/5	No	No	7 105	1 000	4	No data on 2 trade unions
PL	1/4	No	Yes	84 289	30 000	33	
PT	0/17	No	No	4 144	–	0	
RO	0/5	No	No	44 591	–	0	
SE	2/6	Yes	No	19 931	15 167	*137*	
SI	1/9	Yes	No	11 844	1 672	35	

([27]) As raised by ETF during the informal consultation of this report, the trade union membership data might be skewed due to the linguistic differences and the public/private divide in the sector in the country. Additionally, due to missing data for the majority of unions (8 of 9), the density could not be calculated

([28]) According to ETF, this number should be 36 658. For comparability, the original number has been retained.

([29]) According to the ETF affiliate, this number is probably an underestimate.

Member State	ETF-affiliated trade unions/ total number of trade unions	Including the largest trade union?	Including the second largest trade union?	Number of sectoral trade union members in the country	Number of ETF-affiliated trade union members	Trade union density of the ETF-affiliated trade union in the sectoral workforce (%)	Notes
SK ([30])	1/3	Yes	No	2 957	1 123	6	
Total	**44/137**	**19**	**10**	**728 603**	**486 554**	**67**	

Notes: Trade union densities exceeding 100 % are provided in italics. These numbers may be due to no disaggregated data being available for the railway sector or because membership is overestimated when compared to the railway workforce registered at the national level. 'n.d.' stands for no data.

Source: Network of Eurofound Correspondents.

Table 11 compares the number of ETF affiliates in 2017, when the last representativeness study was undertaken, with the number in 2024. It is important to note that the previous representativeness study for the sector also included urban public transport in addition to the railway sector, hence, a direct comparison between the two studies cannot be carried out. While the analysis of ETF affiliates in 2017 attempts to exclude those that covered only urban public transport activities, they cannot be fully excluded due to methodological differences and difficulties in separating the sectoral activities. Overall, the number of ETF affiliates declined from 75 in 2017 to 44 in 2024. The decline in ETF affiliates was significant in Austria, Belgium, Bulgaria, Denmark, Estonia, France, Hungary, Portugal, Romania and Slovenia.

Table 11: ETF affiliates, EU-25, 2017 and 2024

Member State	ETF affiliates in 2024	Member State	ETF affiliates in 2017
AT	Vida	AT	Vida
		AT	GPF
		AT	younion
BE	Synova ([31])	BE	Synova (ACLVB/CGSLBS)
BE	ACOD/CGSP	BE	ACOD Spoor / CGSP Cheminots
BE	ACV / CSC Transcom	BE	ACV / CSC Transcom
BE	ACV Puls / CSC CNE	BE	CNE/GNC
		BE	BBTK/SETCa
		BE	ABVV BTB / FGTB UBT
		BE	LBC/NVK
BG	СТСБ	BG	Syndicate of Railwaymen in Bulgaria
BG	НЖС	BG	СТСБ
		BG	FTW Podkrepa
		BG	NURW Podkrepa
		CY (*)	FTPAW-SEK

([30]) As explained in Section 1.5, there are several smaller trade union organisations that have appeared since the previous representativeness study for the railway sector in 2017 as a result of market liberalisation, including in Slovakia. However, only three Slovak trade unions have replied to the requests for information submitted by Eurofound correspondents.

([31]) ACLVB/CGSLBS rebranded as Synova in 2026.

Member State	ETF affiliates in 2024	Member State	ETF affiliates in 2017
CZ	OSŽ	CZ	OSŽ
DE	EVG	DE	EVG
DE	ver.di	DE	ver.di
DK	DJF	DK	DJF
DK	HK	DK	HK
DK	DMF	DK	DMF
		DK	3F
		DK	HK T&J
EE	No member	EE	ERAÜ
		EE	ETTA
EL	ΠΟΣ	EL	ΠΟΣ
ES	FSC-CCOO	ES	FSC-CCOO
ES	FeSMC-UGT	ES	SMC-UGT
ES	ELA-Gizalan	ES	ELA-Gizalan
		ES	FGAMT-CIG
FI	RAU	FI	VML
FI	JHL	FI	
FR	UNSA-Ferroviaire	FR	UNSA-Ferroviaire
		FR	UNSA-Transport
FR	FGT-CFTC	FR	CFTC
FR	CGT-Cheminots	FR	CGT-Cheminots
		FR	CGT-Transport
FR	UFCAC	FR	FGTE-CFDT (**)
FR	FEETS-FO	FR	FO Cheminots
HR	SSH	HR	RETUC
HR	SŽH	HR	SŽH
		HR	SHŽ
HU	VSZ	HU	VSZ
HU	VDSZSZ	HU	VDSZSZ
		HU	GYDSZSZ
		HU	VDSZSZ Solidarity (**)
IE	SIPTU	IE	SIPTU
IT	FILT-CGIL	IT	FILT-CGIL
IT	FIT-CISL	IT	FIT-CISL
IT	Uiltrasporti	IT	Uiltrasporti
LT	LGPF	LT	LGPF
		LT	VPS
LU	OGB-L Syndicat des chemins de fer / FNCTTFEL-Landesverband	LU	OGB-L Syndicat des chemins de fer / FNCTTFEL-Landesverband
LU	Syprolux	LU	FCPT Syprolux
		LU	ACAL
LU	LCGB-Transport	LU	LCGB-Transport
LV	LDZSA	LV	LDZSA

Member State	ETF affiliates in 2024	Member State	ETF affiliates in 2017
NL	CNV	NL	CNV
NL	FNV	NL	FNV
PL	KSK NSZZ Solidarność	PL	KSK NSZZ Solidarność
		PL	FZZK
PT	No member	PT	Sindefer
RO	No member	RO	TRANSLOC Romania (***)
		RO	FNFMC
		RO	FNDF
SE	Seko	SE	Seko
SE	ST	SE	ST
		SE	Unionen
SI	SSSLO	SI	SSSLO
		SI	SŽPS
		SI	SŽTS
		SI	SŽS
		SI	SPS
		SI	SŽPD
SK	OZŽ	SK	OZŽ
Total	**44**		**75**

(*) Cyprus was not included in the 2024 representativeness study, as it has no railway sector. It was included in the 2017 study and had three unions organising under NACE Rev. 2.1 code 52.21 (the service activities incidental to land transportation).

(**) This trade union was included in the 2017 representativeness study for the railway sector but is no longer affiliated.

(***) This trade union was included in the 2017 representativeness study for the railway and local urban transport sectors but currently has no members in the railway sector.

Notes: The trade unions discussed in 2017 were included if they covered the railway sector NACE codes; trade unions only organising in the urban transport activities sector were excluded from the count.

Source: Network of Eurofound Correspondents.

3.1. Sector-relatedness of ETF member organisations in the railway sector

The sector-relatedness of ETF national member organisations was assessed across the different NACE activities within the railway sector by examining first the different categories of workers these organisations represent, second their members' employment status and third their members' skill levels and the size of company they work at.

First, Table 12 categorises ETF affiliates based on the various types of railway workers among their members, such as those involved in passenger transport, freight transport, railway infrastructure, station operations and intermediation service activities. Some 40 ETF affiliates have trade union members working in passenger transport, 40 members in freight transport, 38 members in railway infrastructure, 34 members in station operations and 16 members in intermediation service activities.

Table 12: Types of workers in the railway sectoral trade unions affiliated to ETF, by different parts of the sector, EU-25, 2024

Parts of railway sector	Total number of trade unions representing these workers	Number of ETF affiliates representing these workers	% of ETF affiliates	Member States with a trade union	Member States with an ETF affiliate	Member States with trade unions representing workers not affiliated to ETF
Passenger transport	113	40	35	25	22	3
Freight transport	111	40	36	25	22	3
Operation of railway infrastructure (tracks, signalling, etc.)	109	38	35	25	22	3
Operation of stations/terminals	93	34	37	24	19	5
Intermediation service activities	36	16	44	12	12	0

Note: A given trade union can organise more than one category of railway worker.

Source: Network of Eurofound Correspondents.

Table 13 categorises ETF affiliates based on the various types of employment status the railway workers among their members have, such as employees, self-employed, management staff and train drivers. Some 42 ETF affiliates have members who are employees, and 10 have members who are self-employed. There are 37 ETF-affiliated trade unions organising management staff and 39 organising train drivers.

Table 13: Types of workers who are members in the railway sectoral trade unions affiliated to ETF, by employment status, EU-25, 2024

Types of workers organised	Number of trade unions representing these workers	Number of ETF affiliates representing these workers	% of ETF affiliates	Member States with a trade union	Member States with an ETF affiliate	Member States with trade unions representing workers not affiliated to ETF
Employees	124	42	34	25	22	3
Self-employed	20	10	50	7	6	1
Management staff	77	37	48	23	21	2
Train drivers	95	39	41	25	21	4

Note: A given trade union can organise more than one category of railway worker.

Source: Network of Eurofound Correspondents.

Table 14 categorises ETF affiliates based on the skill levels of their members and the size of company these members work at. Altogether, 36 ETF affiliates have members with primary (ISCED 1), 41 with secondary (ISCED 2, 3 and 4) and 38 with tertiary (ISCED 5, 6, 7 and 8) skill levels.

Table 14: Types of workers who are members in the railway sectoral trade unions affiliated to ETF, by skill level, EU-25, 2024

Skill level of workers organised	Number of all trade unions representing these workers	Number of ETF affiliates representing these workers	% of ETF affiliates	Member States with a trade union	Member States with an ETF affiliate	Member States with trade unions representing workers not affiliated to ETF
Primary (ISCED 1)	103	36	35	25	22	3
Secondary (ISCED 2, 3, 4)	122	41	34	25	22	3
Tertiary (ISCED 5, 6, 7, 8)	118	38	32	25	22	3

Note: A given trade union can organise railway workers with different skill levels.

Source: Network of Eurofound Correspondents.

As seen in Table 15, 20 ETF affiliates have members in companies employing 1–9 employees, 26 in companies employing 10–49 employees, 30 in companies employing 50–249 employees and 43 in companies employing 250+ workers.

Table 15: Types of workers who are members in the railway sectoral trade unions affiliated to ETF, by the size of company they are working at, EU-25, 2024

Size of company (number of employees)	Number of all trade unions representing these workers	Number of ETF affiliates representing these workers	% of ETF affiliates	Member States with a trade union	Member States with an ETF affiliate	Member States with trade unions representing workers not affiliated to ETF
1–9	37	20	54	12	9	3
10–49	47	26	55	15	12	3
50–249	77	30	39	21	16	5
250+	129	43	33	25	22	3

Note: A given trade union can organise railway workers employed in more than one size group.

Source: Network of Eurofound Correspondents.

3.2. ETF's role in national sectoral industrial relations

Commission Decision 98/500/EC of 1998, in its Article 1(b), refers to three criteria to be assessed to determine whether social partner organisations (in this case, trade unions) are representative. These criteria relate to:

- whether the affiliated sectoral trade unions are an integral and recognised part of the sectoral social dialogue structures in the Member State, through involvement in bipartite or tripartite social dialogue or by being consulted by government institutions ([32]);
- the extent to which affiliated sectoral trade unions have the capacity to negotiate agreements determining the working conditions of the sectoral workforce – in other words,

([32]) In the context of this study, bipartite social dialogue is between trade unions and employer organisations; tripartite social dialogue is between trade unions, employer organisations and government representatives. Bilateral consultations are between government and trade unions and/or between government and employer organisations. Each configuration involves mutual recognition.

whether they are involved in collective bargaining – and the proportion of the workforce that is covered by collective bargaining;

- the number of affiliated sectoral trade unions that are considered representative in the national industrial relations setting of the Member State and the number of Member States in which this is the case.

3.2.1. Integral and recognised participation in national social dialogue structures

Table 16 provides a detailed analysis of ETF affiliates' involvement in social dialogue structures within the railway sector. In total, 31 ETF affiliates are involved in the sectoral social dialogue structures for the railway sector in their countries, and 35 are consulted by the government on sector-related matters. Of all the railway trade unions identified, 44 % are involved in bipartite or tripartite social dialogue bodies in 19 countries. When focusing on trade unions affiliated with ETF, the table shows that 70 % of them participate in bipartite or tripartite social dialogue bodies in 15 countries.

There are 90 unions affiliated to a national trade union confederation, or 66 % of the total 137 unions, in 25 countries. Some 39 ETF members are affiliated with a national trade union confederation, or 89 % of the total 44 ETF affiliates, in 21 countries with an ETF affiliate (except in Lithuania).

Altogether, 88 (64 %) sectoral trade unions are consulted by government institutions in 23 countries (not in Bulgaria and Slovenia). In 20 Member States (not Bulgaria or Slovenia), a total of 35 (80 %) of all ETF member unions are consulted.

Table 16: ETF affiliates involved in national social dialogue structures, EU-25, 2024

	Involved in a bipartite or tripartite social dialogue body	Affiliated to a national confederation	Consulted by government on sector-related matters
Total number of railway trade unions (% of the 137 identified unions)	60 (44 %)	90 (66 %)	88 (64 %)
Number of Member States	19	25	23 (not in BG, SI)
Number of trade unions affiliated to ETF (% of the 44 ETF-affiliated unions)	31 (70 %)	39 (89 %)	35 (80 %)
Number of Member States	15	21 (not in LT)	20 (not in BG, SI)

Source: Network of Eurofound Correspondents.

3.2.2. Capacity to negotiate collective bargaining agreements

Out of the 137 sector-related trade unions for which data are available, 128 are involved in collective bargaining (93 %). Of these, 23 are ETF affiliates and are involved in collective bargaining at the sector level in 21 Member States (with the exception of Greece), and 39 are involved at the company level in 20 Member States (with the exception of Greece and Lithuania) (see Table 17).

Table 16: Trade unions' involvement in collective bargaining, EU-25, 2024

	All unions	**Affiliated to ETF**		
	Total number of railway trade unions involved in any collective bargaining	Number of ETF member unions involved in any collective bargaining (% of 44 affiliated unions)	Number of ETF member unions involved in collective bargaining at the:	
			Sector level	Company level
Number of trade unions (% of the 137 identified unions)	128 (93 %)	42 (95 %)	24 (55 %)	38 (86 %)
Number of Member States	25	21	11	20
	AT, BE, BG, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, NL, PL, PT, RO, SE, SI, SK	All except EL	AT, BE, DK, DE, FI, FR, IT, LT, LV, SE, SI	All except EL and LT
Number of trade unions with no data on any level of collective bargaining (% of the 137 identified unions)	3 (EL, NL, PL) (2 %)	0	0	0

Source: Network of Eurofound Correspondents.

The collective bargaining coverage of ETF affiliates in the national railway sector workforce ranges from none in Greece to 100 % in several countries, with an average coverage of 76 %, as shown in Table 18. This high level is noted for ETF affiliates in Austria, Belgium, Bulgaria, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania and Sweden. In contrast, the collective bargaining coverage of ETF affiliates is lower (between 13 % and 41 %) in four countries: Croatia, Finland, Luxembourg and Slovenia.

Table 17: List of ETF-affiliated trade unions' involvement in collective bargaining and coverage level, EU-25, 2024

Member State	**Trade union name**	**Involvement in collective bargaining for the railway sector**		**Collective bargaining coverage of the national railway workforce (%)**
		Sector level	**Company level**	
AT	Vida	Yes	Yes	100
BE	ACOD/CGSP	Yes	Yes	100
BE	ACV Puls / CSC CNE	Yes	Yes	Small proportion
BE	ACV / CSC Transcom	Yes	Yes	100
BE	Synova	Yes	Yes	100
BG	НЖС	No	Yes	> 90
BG	СТСБ	No	Yes	> 90
CZ	OSŽ	No	Yes	79
DE	EVG	Yes	Yes	Large majority of the sector
DE	ver.di	Yes	Yes	2

Member State	Trade union name	Involvement in collective bargaining for the railway sector		Collective bargaining coverage of the national railway workforce (%)
		Sector level	Company level	
DK	DJF	Yes	Yes	50
DK	DMF	Yes	No	n.d.
DK	HK	Yes	No	n.d.
EL	ΠΟΣ	No	No	n.d.
ES	ELA-Gizalan	No	Yes	n.d.
ES	FSC-CCOO	No	Yes	n.d.
ES	FeSMC-UGT	No	Yes	n.d.
FI	JHL	Yes	Yes	41
FI	RAU	Yes	No	13
FR	CGT-Cheminots	Yes	Yes	100
FR	FEETS-FO	Yes	Yes	100
FR	FGT-CFTC	No	Yes	100
FR	UFCAC	Yes	Yes	100
FR	UNSA-Ferroviaire	Yes	Yes	100
HR	SSH	No	Yes	18
HR	SŽH	No	Yes	40
HU	VDSZSZ	No	Yes	90
HU	VSZ	No	Yes	90
IE	SIPTU	No	Yes	100
IT	FILT-CGIL	Yes	Yes	100
IT	FIT-CISL	Yes	Yes	100
IT	Uiltrasporti	Yes	Yes	100
LT	LGPF	Yes	No	96
LU	LCGB-Transport	No	Yes	19
LU	OGB-L Syndicat des chemins de fer / FNCTTFEL-Landesverband	No	Yes	19
LU	Syprolux	No	No	n.d.
LV	LDZSA	Yes	Yes	100
NL	CNV	No	Yes	90
NL	FNV	No	Yes	90
PL	KSK NSZZ Solidarność	No	Yes	n.d.
SE	Seko	Yes	Yes	100
SE	ST	Yes	Yes	100
SI	SSSLO	Yes	Yes	30
SK	OZŽ	No	Yes	75
Total (*)	**44 (95 %)**	**24 (55 %)**	**38 (86 %)**	**Average 76**

(*) Number of ETF member unions involved in any collective bargaining (percentage of 44 affiliated unions).

Note: n.d., no data provided by the trade union to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

3.2.3. ETF members' representative status at the national level

Out of the 137 trade unions in the sector, 115 or 84 % are considered representative (based on the national recognition criteria), in all 25 countries with a sectoral trade union (see Table 19). Among these ETF affiliates, the vast majority (41 out of 44) are considered representative in all 22 countries with ETF affiliates. The three ETF affiliates not considered representative are in France (FEETS-FO and FGT-CFTC) and Luxembourg (Syprolux), and in both countries other ETF affiliates are considered representative. No information was available for the Danish affiliate DMF and the Spanish union ELA-Gizalan. All ETF affiliates are considered to be trade unions (as opposed to professional associations or other forms of organisations).

Table 18: Representative status of ETF-affiliated national-level organisations, EU-25, 2024

	Recognised as representative based on national recognition criteria
Total number of railway sector trade unions (% of the 137 identified unions) in how many countries	115 (84 %) in 25 Member States
Number of trade unions affiliated to ETF (% of the 44 affiliated unions) in how many countries	41 (93 %) in 22 Member States

Source: Network of Eurofound Correspondents.

3.3. ETF's structures to ensure its members' effective participation

Table 20 shows the information available on the ETF affiliates' participation in ETF structures, which has been provided to Eurofound's correspondents by the national trade unions. According to this information, 22 affiliates are involved in ETF's Executive Committee. All affiliates pay affiliation fees to ETF for their workers/members in the railway sector. Some 27 affiliates are actively involved in ETF's working groups. While all ETF affiliates are invited to participate in the committee's plenary meetings, 24 affiliates reported active involvement in the ESSDC for the railway sector on behalf of ETF.

Table 19: ETF affiliates' participation in ETF structures, EU-25, 2024

Member State	**ETF affiliate**	**Involved in ETF's Executive Committee**	**Pays affiliation fees to ETF for its members in the railway sector**	**Actively involved in ETF's working groups**	**Involved in the ESSDC for the railway sector on behalf of ETF**
AT	Vida	Yes	Yes	Yes	Yes
BE	ACOD/CGSP		Yes		
BE	ACV Puls / CSC CNE	Yes	Yes	Yes	Yes
BE	ACV / CSC Transcom	Yes	Yes	Yes	Yes
BE	Synova		Yes		
BG	НЖС		Yes	Yes	Yes
BG	СТСБ	Yes	Yes	Yes	Yes
CZ	OSŽ	Yes	Yes	Yes	Yes
DE	EVG	Yes	Yes	Yes	Yes
DE	ver.di	Yes	Yes	Yes	
DK	DJF		Yes	Yes	

Member State	ETF affiliate	Involved in ETF's Executive Committee	Pays affiliation fees to ETF for its members in the railway sector	Actively involved in ETF's working groups	Involved in the ESSDC for the railway sector on behalf of ETF
DK	DMF		Yes	Yes	
DK	HK		Yes		
EL	ΠΟΣ		Yes		
ES	ELA-Gizalan	n.d.	Yes	n.d.	n.d.
ES	FeSMC-UGT	n.d.	Yes	n.d.	n.d.
ES	FSC-CCOO	n.d.	Yes	n.d.	n.d.
FI	JHL		Yes	Yes	
FI	RAU		Yes		
FR	CGT-Cheminots	Yes	Yes	Yes	Yes
FR	FEETS-FO	Yes	Yes	Yes	Yes
FR	FGT-CFTC	Yes	Yes	Yes	Yes
FR	UFCAC	Yes	Yes	Yes	Yes
FR	UNSA-Ferroviaire		Yes	Yes	Yes
HR	SSH		Yes	Yes	Yes
HR	SŽH		Yes	Yes	Yes
HU	VDSZSZ		Yes		
HU	VSZ	Yes	Yes	Yes	Yes
IE	SIPTU	Yes	Yes		
IT	FILT-CGIL	Yes	Yes	Yes	Yes
IT	FIT-CISL	Yes	Yes	Yes	Yes
IT	Uiltrasporti	Yes	Yes	Yes	Yes
LT	LGPF		Yes		
LU	LCGB-Transport		Yes		
LU	OGB-L Syndicat des chemins de fer / FNCTTFEL-Landesverband	Yes	Yes	Yes	Yes
LU	Syprolux	Yes	Yes	Yes	Yes
LV	LDZSA	n.d.	Yes	n.d.	n.d.
NL	CNV	n.d.	Yes	n.d.	n.d.
NL	FNV	Yes	Yes	Yes	Yes
PL	KSK NSZZ Solidarność	n.d.	Yes	n.d.	n.d.
SE	Seko	Yes	Yes	Yes	Yes
SE	ST	Yes	Yes	Yes	Yes
SI	SSSLO	Yes	Yes		Yes
SK	OZŽ		Yes		
Total	**44**	**22**	**44**	**27**	**24**

Notes: Blank cells indicate lack of involvement in the category. n.d., no data provided by the trade union to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

3.4. ETF's negotiation capacity

As stated in the Introduction, one of the European Commission's criteria for EU-level social partners to be consulted, as described in Commission Decision 98/500/EC, is for them to represent organisations that are themselves an integral and recognised part of Member States' social partner structures (covered in Section 3.2.1). Additionally, they must also have the capacity to negotiate labour agreements and be representative of several Member States. Based on Article 155 of the TFEU, European sectoral social partner organisations need to prove their capacity to negotiate on behalf of their members and to enter 'contractual relations, including agreements' (Article 155 of the TFEU), that is, their capacity to commit themselves and their national affiliates. A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates or if it can receive such a mandate in accordance with a given mandating procedure.

Eurofound applies the criterion of the 'capacity to negotiate' to both the EU-level partner associations and, in a bottom-up approach, the national organisations in order to assess their relevance. Following these arguments, the standard Eurofound methodology for assessing the criteria of being an 'integral part of Member State industrial relations' and having the 'capacity to negotiate' applies the 'capacity to negotiate agreements' at both the EU and national levels. The mandate / mandating procedure can be either **statutory** (i.e. laid down in the constitution of the organisation or annexed to it) or **non-statutory** (i.e. laid down in secondary documents, such as rules of procedure, memoranda of understanding and/or ad hoc decisions by the organisation's governing bodies). Finally, in the absence of the above procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in binding agreements, declarations, joint opinions and so on.

According to ETF's constitution, amended in 2022, ETF's governing body between congresses is the Executive Committee. Article 8 of the same constitution states that one of ETF's activities is

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

In its section on the Executive Committee (Rule VI), Article 13 mentions that

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

Articles 14 and 15 (ETF, 2022) state that the Executive Committee may establish various working groups and subcommittees to facilitate its work.

> *The Executive Committee may establish working groups or committees (such as a Logistics Committee) to deal with matters of a cross-sectoral nature.*
>
> *The Executive Committee may establish sub-committees to prepare and support its work and shall determine their composition, terms of reference and working procedures.*

The ETF constitution does not mention the negotiation capacity of each ETF section (according to the constitution, there are eight sections, including the railway section) per se. However, each section can establish its own rules of procedure, subject to the approval of the Executive Committee (Article 4, Rule X, ETF, 2022).

> *Each Section shall establish its own rules of procedure, subject to ratification by the Executive Committee and to create [*sic*], if necessary, subcommittees or working groups dealing with specific sub-regions or topics. The rules of procedure shall include the standards outlined in Annex 3 of the Constitution.*

The 2022 constitution thus no longer includes a reference to ETF's right to adopt a negotiation mandate and strategy. The reference to the section president, who informs the Executive Committee regularly about the progress of negotiations and the final results, was also dropped from the current 2022 constitution.

In sum, ETF has a **statutory provision** that indicates that the Executive Committee oversees and is informed about negotiations and the conclusions of sectoral agreements. The conclusion of several joint agreements in the railway ESSDC also indicates a sufficient capacity to negotiate and conclude agreements as provided for in Article 155 of the TFEU.

3.5. ETF members' effective participation in the railway sector ESSDC

Commission Decision 98/500/EC from 1998, on the establishment of ESSDCs, stipulates in its Article 1(c) that European social partner organisations 'shall have adequate structures to ensure their effective participation in the work of the Committees'. The adequacy of the structures to enable ETF to represent its members on the ESSDC, in European Commission consultations and in the negotiation of binding agreements has been analysed in the previous section. In this section, ETF members' effective participation in ESSDC meetings is outlined (see Table 21). Based on data shared by the European Commission, delegates from 13 Member States, in addition to the ETF Secretariat, were represented at ESSDC meetings in 2023, 2024 and 2025. ETF affiliates from all these 13 countries also confirmed their participation in ESSDC meetings on behalf of ETF to the Eurofound correspondents (see Section 3.3). Additionally, ETF members from another three Member States (Croatia, Hungary and Slovenia) mentioned their participation in ESSDC meetings on behalf of ETF, despite not being recorded on the attendance lists between 2023 and 2025.

Table 20: Overview of ETF members' participation in railway sector ESSDC meetings, 2023–2025

Participation	Member States	Number of Member States
Trade union delegates from	**AT, BE, BG, CZ, DE, ES, FI, FR, LU, IT, NL, SE, SI**	13/22
Countries in which ETF has members but no delegates participating in meetings between 2023 and 2025	DK, EL, *HR*, *HU*, IE, LT, LV, *SI*, SK	9/22

Notes: Bold font used for countries on the attendance list provided by the European Commission Directorate-General for Employment, Social Affairs and Inclusion whose attendance was confirmed by ETF affiliates to Eurofound correspondents during data collection; italic font indicates countries that are not listed on the attendance list but indicated that they participated in these meetings to Eurofound correspondents.

Sources: European Commission and Network of Eurofound Correspondents.

4. Community of European Railway and Infrastructure Companies (CER)

CER represents both employer organisations and individual railway companies. CER's representativeness is detailed on the scoreboard (see Figure7), covering both CER member employer organisations and member companies.

Figure 7 illustrates on the right, in blue, that 5 out of the 35 sector-related employer organisations (14 %) are affiliated to CER in four Member States (Austria, Belgium, Germany and Sweden). No sectoral employer organisations exist in Bulgaria, Croatia, Estonia, Greece, Ireland, Latvia, Luxembourg or the Netherlands. In addition, 42 companies are affiliated to CER, and these are located in Austria, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden. Thus, CER has at least one member (employer organisation or company) in all 25 Member States with railways.

Figure 7: Scoreboard of the representativeness of CER in the railway sector, EU-25, 2024

5 out of 35 railway sector employer organisations are affiliated to CER (14 %)	CER has at least one member employer organisation or company in all 25 Member States		
	AT	FI	NL
	BE	FR	PL
	BG	HR	PT
	CZ	HU	RO
	DE	IE	SE
	DK	IT	SI
	EE	LT	SK
	EL	**LU**	
	ES	**LV**	

Notes: The blue part of the chart corresponds to the number of sectoral employer organisations affiliated to CER. Blue-shaded cells indicate Member States in which CER has at least one affiliate: a company or a sectoral employer organisation. Bold font indicates the Member States in which CER has both affiliate companies and affiliate employer organisations.

Source: Network of Eurofound Correspondents.

Of the total 1 202 companies in the railway sector in the 25 Member States included in this study, there are 1 117 affiliated to a sectoral employer organisation. This is based on estimates from experts and information provided by 29 of the 35 sectoral employer organisations and therefore is probably an underestimate. The five employer organisations affiliated to CER report that they have 527 sectoral companies affiliated to them (see Table 22). Together with 42 companies that are direct members of CER, this adds up to 569 companies and corresponds to 51 % of all sectoral companies

affiliated to an employer organisation or 47 % of all 1 202 railway companies in the EU-25 (see Section 1.3). The 42 companies that are CER members employ around 87 % of the entire European sectoral workforce (around 788 866 workers are employed by CER affiliates ([33]) of the 903 463 workers in this sector in the EU-25).

Five employer organisations across four Member States are affiliated to CER (see Table 22). In these four Member States, the largest employer organisation in the sector is affiliated to CER. In Germany, the second largest employer organisation in the sector is also affiliated to CER. Collectively, the five CER employer organisation affiliates have 527 member companies, a vast majority of the sectoral companies in the four Member States. The five CER employer organisation affiliates employ around 884 665 workers (or around 98 % of the total number of sector workers in the EU-25).

Among the 42 company affiliates of CER, 27 affiliates are the largest sectoral company in their country, and a further 8 are the second largest. Together they employ around 799 096workers (or around 89 % of the total number of sector workers in the EU-25; see Table 23). It is noteworthy that some of the 42 companies that are direct CER members may also be counted among the sectoral companies represented by the five CER-affiliated employer organisations.

Table 21: Membership strength of employer organisations affiliated to CER, EU-25, 2024

Member State	CER-affiliated EOs / total number of EOs	Including the largest EO	Including the second largest EO	Number of companies affiliated to all the sectoral EOs in the Member State	Number of companies affiliated to CER members	Number of workers employed by CER affiliates	Total number of railway sector companies	Share of CER member companies in the number of companies in railway sector (%)
AT	1/1	Yes	1 EO	108	108	42 000	41	100 ([34])
BE	1/2	Yes	No	9	2	273 665	9	22
DE	2/3	Yes	Yes	423	323	550 000	490	66
SE	1/2	Yes	No	118	94	19 000	58	162 ([35])
Total	**5/35**	**4**	**1**	**658**	**527**	**884 665**	**598**	**88**

Note: EO, employer organisation.

Source: Network of Eurofound Correspondents.

([33]) As shown in the analysis that follows, the five CER employer organisation affiliates employ around 884 665 sector workers, and 42 CER company affiliates employ around 788 866 workers. The two figures should not be added together, as there is an overlap between them: some CER company affiliates are in turn affiliated to CER employer organisation affiliates.

([34]) Membership is compulsory for rail companies in Austria.

([35]) This proportion exceeds 100 % due to the national definitions used.

Table 22: Membership strength of companies affiliated to CER, EU-25, 2024

Member State	CER company member	Ranking in the sector by membership size	Collective workforce in the railway sector in the country
AT	ÖBB Holding	Largest	**40 818** (*)
AT	GYSEV/Raaberbahn[36]	Not the largest	316
BE	NMBS-SNCB	Largest	**17 642**
BG	НКЖИ	Largest	10 845
BG	БДЖ – Пътнически превози	Largest	5 207
BG	БДЖ – Товарни превози	Largest	1 999
CZ	SŽ	Largest	14 102
CZ	ČD	Second	11 360
CZ	ČD Cargo	Third	5 484
DE	DB	Largest	223 072
DK	DSB	Largest	6 181
EE	Estonian Railways	Largest	773
EL	Hellenic Train	Largest	2 185
EL	OSE	Second	584
EL	PEARL	Third	23
ES	Grupo Renfe	Largest	1 719 (*)
FI	VR	Largest	5 529
FR	*SNCF*	Largest	**147 916** ([37])
HR	HŽ Infrastruktura	Largest	5 194 (490 719)
HR	HŽPP	Second	1 651
HR	HŽ Cargo	Third	1 125
HU	MÁV Group	Largest	35 728
HU	GYSEV	n.d.	n.d.
IE	*IÉ*	Largest	4 127
IT	FSI	Largest	92 446
LT	LTG Group	Largest	4 650
LU	CFL Group	Largest	3 368
LU	CFL Cargo	Second	270
LU	CFL Multimodal	Fourth	125
LV	LDZ	Largest	3 945
LV	RB Rail	Second	212
NL	NS	Largest	25 000
PL	*PKP PLK*	Largest	35 836
PL	PKP S.A.	Second	21 833
PT	CP	Largest	4 024

([36]) GYSEV is a joint Hungarian-Austrian company operating in the west of Hungary, based in Hungary, connecting two Hungarian and one Austrian cities. Its listed as GYSEV as this is the name the company uses for its operations in Hungary. GYSEV/Raaberbahn is the Austrian branch and is registered as a separate company in Austria with the name 'GYSEV/Raaberbahn'

([37]) As specified by a CER affiliate.

Member State	CER company member	Ranking in the sector by membership size	Collective workforce in the railway sector in the country
RO	CFR	Largest	25 937
RO	CFR Călători	Second	10 876
SE	SJ	Largest	5 400
SI	SŽ (*)	Largest	7 114
SK	ŽSR	Largest	8 331
SK	ZSSK	Second	3 570
SK	ZSSK Cargo	Third	2 579
Total	**42**	**Largest: 27** **Second largest: 8**	**799 096**

(*) Several facts were relayed by CER affiliates during the last stages of consultation on the study. In Austria, ÖBB representatives indicated that this number refers to the total workforce of the ÖBB Group in Austria, while ÖBB Holding (the official CER member, representing the whole ÖBB company group, including its subsidiaries, within CER) itself employs only 234 staff. In Spain, Grupo Renfe representatives pointed out that this number is probably inaccurate, but no further data were provided. In Slovenia, CER confirmed that SŽ is a CER member. SŽ has two subsidiaries, SŽ-Potniški promet and SŽ-Tovorni promet; however, it is the SŽ company group that is a CER member, not the two separate subsidiaries.

Notes: Italic font indicates companies also affiliated to EIM; bold font indicates numbers provided by CER-affiliated companies during the consultation for the study.

Sources: Network of Eurofound Correspondents (and CER members for numbers listed in bold).

Next is a comparison of the number of CER affiliates (employer organisations and companies) in 2017, when the last representativeness study was undertaken ([38]), with the number in 2024 (see Table 24). Overall, the number of CER employer organisation affiliates increased from four employer organisations in 2017 to five in 2024 (the new employer organisation that joined CER is Belgium's HR Rail). The number of company CER affiliates has remained stable at 42 from 2017 to 2024, although in some countries (e.g. Romania) CER members reorganised their company structure and merged what were four different companies in 2017 into two larger ones by 2024. It is noteworthy that CER has maintained the large incumbents among its members but has also gained members among the newer, in some cases smaller, companies.

Table 23: CER affiliates, EU-25, 2017 and 2024

EO affiliates				**Company affiliates**			
MS	**EO member in 2024**	**MS**	**EO member in 2017**	**MS**	**Company member in 2024**	**MS**	**Company member in 2017**
AT	FVSCH	AT	FVS (*)	AT	ÖBB Holding		
				AT	GYSEV/Raaberbahn		
BE	*HR Rail*			BE	NMBS-SNCB	BE	NMBS/SMCB
						BE	B Logistics Group
				BG	БДЖ – Пътнически превози	BG	Холдинг БДЖ
				BG	БДЖ – Товарни превози		
				BG	НКЖИ	BG	NRIC/НКЖИ

([38]) The employer organisations discussed in 2017 were included if they covered the railway sector NACE codes. Organisations only representing urban transport activities were excluded from the count.

						BG	Bulmarket
						BG	BRC
				CZ	ČD	CZ	ČD
				CZ	ČD Cargo	CZ	ČD Cargo
				CZ	SŽ	CZ	SZDC
				DK	DSB	DK	DSB
DE	AGV MOVE	DE	AGV MOVE	DE	DB		
DE	VDV ([39])	DE	VDV	EE	Estonian Railways	EE	ER (Estonian Railways)
				EL	OSE/ Ο.Σ.Ε	EL	OSE/ Ο.Σ.Ε
				EL	Hellenic Train	EL	TrainOSE
				EL	PEARL		
				ES	Grupo Renfe	ES	Renfe (*)
				FI	VR	FI	VR
				FR	*SNCF*	FR	SNCF
				HR	HŽ Cargo	HR	HŽ Cargo
				HR	HŽ Infrastruktura	HR	HŽ Infrastruktura
				HR	HŽPP	HR	HZ–HŽPP
				HU	MÁV Group ([40])	HU	MÁV Zrt.
				HU	GYSEV	HU	GYSEV
						HU	RCH
				IE	*IÉ*	IE	Irish Rail
				IT	FSI	IT	FS Italiane
				LT	LTG Group	LT	LG
				LU	CFL Group	LU	CFL / CFL Cargo
				LU	CFL Multimodal		
				LU	CFL Cargo		
				LV	LDZ	LV	LDZ
				LV	RB Rail	LV	BTS
						LV	BE
				NL	NS	NL	NS
				PL	*PKP PLK*	PL	PKP
				PL	PKP S.A.	PL	Rail Polska
				PT	CP	PT	CP
						PT	CP Carga

([39]) VDV is a business association, not an employer organisation.

([40]) The CER affiliate highlighted the significant organisational changes that occurred within the MÁV Group (Hungarian State Railways) during 2024–2025. The MÁV Group currently comprises four main entities: MÁV Passenger Transport Co., MÁV Railway Infrastructure Co., MÁV Service Centre and MÁV Co. Among these, MÁV Passenger Transport Co. has experienced the most significant transformations recently. As of 1 January 2025, the integration of MÁV-HÉV Zrt., Volánbusz and MÁV-START Zrt. was successfully completed. This integration established new operational frameworks, a more unified organisational structure and enhanced opportunities for coordinated human resource management. These companies were incorporated into MÁV Passenger Transport Co., with the primary objective of unifying public transport services in Hungary. As of March 2026, the MÁV Group employed a total of 49 462 people (including 16 132 employed by Volánbusz, which provides bus transport).

						PT	IP
				RO	CFR	RO	SNTFC CFR Călători (*)
				RO	CFR Călători	RO	CFR Marfa
						RO	CNCF CFR
						RO	GFR
SE	Tågföretagen	SE	Almega Tjänsteförbunden(*)	SE	SJ		
				SK	ŽSR	SK	ŽSR
				SK	ZSSK	SK	ZSSK
				SK	ZSSK Cargo		
				SI	SŽ	SI	SŽ

Notes: Italic font indicates companies also affiliated to EIM as reported in 2025. The employer organisations discussed in 2017 were included if they covered the railway sector NACE codes. Organisations only organising in the urban transport activities sector were excluded from the count. EO, employer organisation. MS, Member State. (*) used for names for employer organisations and companies for which the names have changed since 2017 as a result of rebranding/renaming.

Source: Network of Eurofound Correspondents.

4.1. Sector-relatedness of CER and its member organisations in the railway sector

The sector-relatedness of CER affiliates was assessed by examining the parts of the railway sector covered by CER employer organisations and company affiliates. The CER affiliates are, in total, five employer organisations and 42 companies.

First, the analysis of the five CER-affiliated employer organisations is provided (see Table 25). Looking at the different parts of the railway sector, all five CER employer organisation affiliates have member companies working in passenger transport, freight transport, the operation of railway infrastructure and the operation of stations/terminals. Four affiliates have member companies working in intermediation service activities for transportation.

Table 25 illustrates that, for key operational activities in the railway sector – passenger transport, freight transport, infrastructure management and station/terminal operation – there are between 18 and 28 employer organisations involved across the EU-25, yet only five of these are CER-affiliated employer organisations. This constitutes between an 18 % and a 28 % representation of CER-affiliated employer organisations in these core activities. For intermediation service activities for transportation, a slightly lower coverage is recorded, with 18 employer organisations and 4 CER-affiliated employer organisations operating in this area, corresponding to a coverage of 22 % for CER.

Furthermore, the table underscores the differences in sectoral representation among employer organisations affiliated and not affiliated with CER. In every activity, a notable portion of Member States have employer organisations that are not affiliated to CER; for example, 10 to 12 Member States in passenger and freight transport, and 8 to 11 in the other parts of the railway sector. This suggests that CER-affiliated employer organisations are present in major sectors and ensure a degree of cross-national coverage; however, this is not extensive compared with all employer organisations.

Table 24: Sectoral coverage of CER-affiliated employer organisations, EU-25, 2024

Part of the railway sector	Number of EOs representing companies in this part of the railway sector	Number of CER EO affiliates representing companies in this part of the railway sector	% of EOs affiliated with CER	Member States with an EO	Member States with a CER-affiliated EO	Member States with EOs representing workers not affiliated to CER
Passenger transport	22	5	23	14	4	10
Freight transport	28	5	18	16	4	12
Operation of railway infrastructure (e.g. tracks, signalling)	21	5	24	15	4	11
Operation of stations/terminals	21	5	24	15	4	11
Intermediation service activities	18	4	22	12	4	8

Note: EO, employer organisation.

Source: Network of Eurofound Correspondents.

The membership coverage of the 42 CER company affiliates is shown below, demonstrating the large proportion of railway sector activities they cover across the EU (see Table 26). The table presents a comprehensive overview of CER company affiliates and their involvement in various segments of the railway sector across the Member States as of 2024. It shows that the majority of affiliates are active in passenger transport (25 affiliates), with significant engagement also seen in freight transport (22), the operation of railway infrastructure (21), the operation of stations and terminals (27) and intermediation service activities for railway services (16). Coverage varies by country, with certain companies – such as ÖBB Holding in Austria, SNCF in France, DB in Germany and PKP S.A. in Poland – demonstrating activity across nearly all sectoral categories, while some affiliates (e.g. Bulgaria's БДЖ group or Croatia's HŽ) specialise in just one or two areas. Overall, the table illustrates both the breadth of CER member coverage in the railway sector and the diversity of their operations across different European nations.

Table 25: Sectoral coverage of companies affiliated to CER, EU-25, 2024

Member State	CER affiliate	Parts of the sector where the company is active				
		Passenger transport	Freight transport	Operation of railway infrastructure	Operation of stations/terminals	Intermediation service activities ([41])
AT	ÖBB Holding	Yes	Yes	Yes	Yes	Yes
AT	GYSEV/Raaberbahn	Yes	Yes	Yes	Yes	n.d.
BE	NMBS-SNCB	Yes			Yes	Yes
BG	БДЖ – Пътнически превози	Yes				
BG	БДЖ – Товарни превози		Yes			
BG	НКЖИ			Yes	Yes	
CZ	SŽ			Yes	Yes	Yes
CZ	ČD	Yes			Yes	Yes
CZ	ČD Cargo		Yes			Yes
DE	DB	Yes	Yes	Yes	Yes	Yes
DK	DSB	Yes			Yes	Yes
EE	Estonian Railways			Yes	Yes	
EL	OSE			Yes	Yes	
EL	Hellenic Train	Yes	Yes			
EL	PEARL		Yes			Yes
ES	Grupo Renfe	Yes	Yes		Yes	
FI	VR	Yes	Yes		Yes	Yes
FR	*SNCF*	Yes	Yes	Yes	Yes	Yes
HR	HŽ Cargo		Yes			
HR	HŽ Infrastruktura			Yes	Yes	
HR	HŽPP	Yes				
HU	MÁV Group	Yes	Yes	Yes	Yes	Yes
HU	GYSEV	n.d.	n.d.	n.d.	n.d.	n.d.

([41]) Such services typically relate to brokering, arranging or facilitating access to rail-related services, such as capacity allocation, ticketing or access to service facilities.

Member State	CER affiliate	Parts of the sector where the company is active				
		Passenger transport	Freight transport	Operation of railway infrastructure	Operation of stations/terminals	Intermediation service activities ([41])
IE	*IÉ*	Yes	Yes	Yes	Yes	
IT	FSI	Yes	Yes	Yes	Yes	
LT	LTG Group	Yes	Yes	Yes	Yes	
LU	CFL Cargo		Yes			
LU	CFL Group	Yes	Yes	Yes	Yes	
LU	CFL Multimodal		Yes			
LV	LDZ	Yes	Yes	Yes	Yes	Yes
LV	RB Rail			Yes	Yes	
NL	NS	Yes			Yes	
PL	*PKP PLK*			Yes	Yes ([42])	Yes
PL	PKP S.A.	Yes	Yes	Yes	Yes	Yes
PT	CP	Yes				
RO	CFR			Yes	Yes	
RO	CFR Călători	Yes				
SE	SJ	Yes				
SK	ŽSR			Yes	Yes	
SK	ZSSK	Yes				Yes
SK	ZSSK Cargo		Yes			
SI	SŽ	Yes	Yes	Yes	Yes	Yes
Total	**42**	**25**	**22**	**21**	**27**	**16**

Notes: Blank cells indicate no coverage of the category; italic font indicates companies also affiliated to EIM. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

([42]) This includes the management of service facilities undertaken for this affiliate, as clarified by the affiliate. The affiliate also clarified that this should be considered partly covered. It manages platforms and passenger information but not station buildings for passenger services.

Table 27 presents an overview of CER employer organisations and the size of the companies affiliated to them in the railway sector. It highlights the presence of employer organisations representing companies of varying sizes, from microenterprises (1–9 employees) to large corporations (over 250 employees). Austria's FVSCH and Sweden's Tågföretagen cover all company sizes, indicating their comprehensive representation of the railway sector within those countries. In Belgium, HR Rail's affiliates are exclusively large companies, while Germany's AGV MOVE and VDV (which is a business association, not an employer organisation) are associated with small, medium and large enterprises but do not cover microcompanies. The totals confirm that, across the listed Member States, two employer organisations represent microcompanies, four cover small companies, four address medium-sized enterprises and five are linked to large companies.

Table 26: CER employer organisation members by size of companies affiliated, EU-25, 2024

Member State	CER member	Microcompanies in the sector (1–9)	Small companies in the sector (10–49)	Medium companies in the sector (50–249)	Large companies in the sector (> 250)
AT	FVSCH	Yes	Yes	Yes	Yes
BE	*HR Rail*				Yes
DE	AGV MOVE		Yes	Yes	Yes
DE	VDV ([43])		Yes	Yes	Yes
SE	Tågföretagen	Yes	Yes	Yes	Yes
Total	**5**	**2**	**4**	**4**	**5**

Notes: Blank cells indicate no coverage of the category; italic font indicates organisations also affiliated to EIM. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

4.2. CER's role in the sectoral industrial relations landscape

Commission Decision 98/500/EC of 1998, in its Article 1(b), includes three criteria to be assessed separately to determine whether social partner organisations are representative:

- whether the affiliated sectoral employer organisations are an integral and recognised part of the sectoral social dialogue structures in the Member State, through involvement in bipartite or tripartite social dialogue or by being consulted by government institutions ([44]);
- the extent to which affiliated employer organisations have the capacity to negotiate agreements determining the working conditions of the sectoral workforce – in other words, whether they are involved in collective bargaining – and the proportion of the workforce that is covered by collective bargaining;
- the number of affiliated sectoral employer organisations that are considered representative in the national industrial relations setting and the number of Member States in which this is the case.

([43]) VDV is a business association, not an employer organisation.

([44]) In the context of this study, bipartite social dialogue is between trade unions and employer organisations; tripartite social dialogue is between trade unions, employer organisations and government representatives. Bilateral consultations are between government and trade unions and/or between government and employer organisations. Each configuration involves mutual recognition.

4.2.1. Integral and recognised part of Member States' industrial relations structures

Tables 28 and 29 illustrate the significant scale of the representation and influence employer organisations and companies affiliated with CER have in the railway sector's social and industrial relations landscape in different Member States.

Among the 35 railway sector employer organisations identified in the EU-25, 15 employer organisations, which represent 43 % of the total, participate in sector-related bipartite or tripartite social dialogue bodies (see Table 28). These organisations are distributed across 10 Member States. Nineteen employer organisations, accounting for 54 % of the total, are affiliated with national confederations, which are present in 13 Member States. Some 23 employer organisations, representing a significant 66 % of the total number of employer organisations in the sector, are consulted by governments on sector-related matters across 13 Member States.

As shown in Table 28, four CER-affiliated employer organisations are involved in national bipartite or tripartite social dialogue related to the railway sector in four Member States, five affiliates are consulted by the government on sector-related matters in four Member States and four affiliates belong to a cross-industry national employer organisation / business association in four Member States.

Table 27: CER employer organisation affiliates involvement in social dialogue in the railway sector, EU-25, 2024

	Involved in a bipartite or tripartite social dialogue body	**Affiliated to a national confederation**	**Consulted by government on sector-related matters**
Total number of railway employer organisations (% of the 35 identified employer organisations)	15 (43 %)	19 (54 %)	23 (66 %)
Number of Member States	10	13	13
Number of employer organisations affiliated to CER (% of 5 affiliated employer organisations)	4 (80 %)	4 (80 %)	5 (100 %)
Number of Member States	4	4	4

Source: Network of Eurofound Correspondents.

Table 29 provides an overview of CER company affiliates' engagement in social dialogue within the European railway sector in 2024, demonstrating their varied involvement across countries. The table highlights notable variation in participation both between countries and among organisations. In total, 28 CER company affiliates are involved in national sectoral bipartite or tripartite social dialogue, 32 affiliates are consulted by the government on sector-related matters and 20 affiliates belong to a cross-industry national employer organisation or business association.

At least one company affiliate each in Austria, Belgium, Bulgaria, Croatia, Denmark, Estonia, Finland, France, Germany, Greece, Ireland, Italy, Latvia, Lithuania, Luxembourg, Poland, Romania, Slovakia, Slovenia and Spain is involved in national bipartite or tripartite social dialogue or government consultation or belongs to a cross-industry confederation. However, the degree of engagement differs. While company affiliates in some countries, such as France and Germany, show strong

participation across all categories, others present more limited involvement. This illustrates the complex and varied landscape of social dialogue in the European railway sector, which is shaped by national contexts and organisational structures.

Table 28: CER company affiliates involved in social dialogue in the railway sector, EU-25, 2024

Member State	CER affiliate	Involved in bipartite or tripartite social dialogue related to the railway sector	Consulted by the government on sector-related matters	Affiliated to a cross-industry national confederation
AT	GYSEV/Raaberbahn			
AT	ÖBB Holding	Yes	Yes	Yes
BE	NMBS-SNCB	Yes	Yes	Yes
BG	БДЖ – Пътнически превози	Yes		
BG	БДЖ – Товарни превози	Yes		
BG	НКЖИ	Yes		
CZ	ČD		Yes	Yes
CZ	ČD Cargo		Yes	Yes
CZ	SŽ		Yes	Yes
DE	DB	Yes	Yes	Yes
DK	DSB	Yes	Yes	Yes
EE	Estonian Railways	Yes	Yes	Yes
EL	Hellenic Train		Yes	Yes
EL	OSE	Yes	Yes	
EL	PEARL		Yes	Yes
ES	Grupo Renfe	Yes		
FI	VR	Yes	Yes	
FR	*SNCF*	Yes	Yes	Yes
HR	HŽ Cargo	Yes	Yes	
HR	HŽ Infrastruktura	Yes	Yes	
HR	HŽPP	Yes	Yes	
HU	GYSEV	n.d.	n.d.	n.d.
HU	MÁV Group		Yes	
IE	*IÉ*	Yes	Yes	Yes
IT	FSI	Yes	Yes	Yes
LT	LTG Group	Yes	Yes	Yes
LU	CFL Cargo		Yes	
LU	CFL Group	Yes	Yes	
LU	CFL Multimodal		Yes	
LV	LDZ	Yes	Yes	Yes
LV	RB Rail		Yes	
NL	NS	n.d.	n.d.	n.d.
PL	*PKP PLK*	Yes	Yes	
PL	PKP S.A.	Yes	Yes	
PT	CP	Yes	Yes	
RO	CFR	Yes		
RO	CFR Călători	Yes		

Member State	CER affiliate	Involved in bipartite or tripartite social dialogue related to the railway sector	Consulted by the government on sector-related matters	Affiliated to a cross-industry national confederation
SE	SJ		Yes	Yes
SI	SŽ			Yes
SK	ŽSR	Yes	Yes	Yes
SK	ZSSK	Yes	Yes	Yes
SK	ZSSK Cargo	Yes	Yes	Yes
Total	**42**	**28**	**32**	**20**

Notes: Blank cells indicate no coverage of the category; italic font indicates companies also affiliated to EIM. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

4.2.2. Capacity to negotiate collective bargaining agreements

Tables 30, 31 and 32 show the participation of CER affiliates, both employer organisations and companies, in the collective bargaining processes in the railway sector in their Member States.

Some 17, or 49 %, of all railway sector employer organisations in the EU-25 are involved in some form of collective bargaining in the sector, whether at the sectoral or company level (see Table 30). This is the case in 11 countries with employer organisations. There are six countries where no employer organisation is involved in any form of sector-related collective bargaining (Czechia, Hungary, Portugal, Romania, Slovakia and Slovenia).

Four out of five CER-affiliated employer organisations are involved in collective bargaining at the sector level and four at the company level, in four Member States (see Table 30). The proportion of the national railway sector workforce covered by the collective bargaining in which the four CER employer organisation affiliates participate is very high, on average around 90 %.

Looking at the different parts of the railway sector, four out of five CER-affiliated employer organisations are involved in the collective bargaining process in passenger transport, freight transport, the operation of railway infrastructure, the operation of stations/terminals and intermediation service activities for railways (see Table 31).

Table 29: Overview of CER-affiliated employer organisations' involvement in railway sector collective bargaining, EU-25, 2024

	All EOs	**EOs affiliated to CER**		
	Total number of railway sector EOs involved in any collective bargaining	Number of CER-affiliated employer organisations involved in any collective bargaining (% of 5 CER-affiliated EOs)	Sector level	Company level
Number of EOs (% of 35 identified EOs)	17 (49 %)	4 (80 %)	4 (80 %)	4 (80 %)
Number of Member States	11	4	4	4
	AT, BE, DK, DE, ES, FI, FR, IT, LT, PL, SE	AT, BE, DE, SE	AT, BE, DE, SE	AT, BE, DE, SE
Member States in which none of the railway EOs are involved in collective bargaining	18 EOs in 6 Member States (CZ, HU, PT, RO, SK, SI) (51 %)			

Note: EO, employer organisation.

Source: Network of Eurofound Correspondents.

Table 30: Overview of CER-affiliated employer organisations' involvement in railway sector collective bargaining, EU-25, 2024

Member State	**CER affiliate**	**Involved in collective bargaining at the sector level for the railway sector**	**Involved in collective bargaining at the company level for the railway sector**	**Proportion of the national railway sector workforce covered by the collective bargaining in which this member is involved (%)**	**Parts of the sector are covered by the collective bargaining in which the affiliate is involved**				
					Passenger transport	**Freight transport**	**Operation of railway infrastructure**	**Operation of stations/terminals**	**Intermediation service activities**
EOs									
AT	FVSCH	Yes	Yes	100	Yes	Yes	Yes	Yes	Yes
BE	*HR Rail*	Yes	Yes	> 50	Yes	Yes	Yes	Yes	Yes
DE	AGV MOVE	Yes	Yes	80	Yes	Yes	Yes	Yes	Yes
DE	VDV ([45])								
SE	Tågföretagen	Yes	Yes	100	Yes	Yes	Yes	Yes	Yes

Notes: Blank cells indicate no coverage of the category; italic font indicates organisations also affiliated to EIM. EO, employer organisation.

Source: Network of Eurofound Correspondents.

Additionally, 37 CER company affiliates are involved in collective bargaining processes for the railway sector either at the sectoral or company level, or both (seven affiliates participate in both sectoral- and company-level collective bargaining) in 25 Member States (see Table 32). The proportion of the national railway sector workforce covered by CER company affiliates' collective bargaining is on average around 50 %. It is noteworthy that for two affiliated companies (GYSEV in Hungary and NS in the Netherlands) no data on collective bargaining involvement or coverage were provided.

([45]) VDV is a business association, not an employer organisation.

Looking at the different parts of the railway sector, 21 CER company affiliates are involved in the collective bargaining process for passenger transport, 20 in collective bargaining for freight transport, 20 in collective bargaining for the operation of railway infrastructure, 24 in collective bargaining for the operation of stations/terminals and 16 in collective bargaining for intermediation service activities.

Table 31: Overview of CER affiliated companies' involvement in railway sector collective bargaining, EU-25, 2024

Member State	CER affiliate	Involved in collective bargaining at the sector level for the railway sector	Involved in collective bargaining at the company level for the railway sector	Proportion of the national railway sector workforce covered by the collective bargaining in which this company is involved (%)	Parts of the sector covered by the collective bargaining in which the affiliate is involved				
					Passenger transport	Freight transport	Operation of railway infrastructure (e.g. tracks, signalling)	Operation of stations/terminals	Intermediation service activities
AT	GYSEV/Raaberbahn								
AT	ÖBB Holding	Yes	Yes	90	Yes	Yes	Yes	Yes	n.d.
BE	NMBS-SNCB	Yes	Yes	Large	Yes			Yes	Yes
BG	БДЖ – Пътнически превози		Yes	26	Yes				
BG	БДЖ – Товарни превози		Yes	10		Yes			
BG	НКЖИ		Yes	54			Yes	Yes	
CZ	ČD		Yes	29	Yes			Yes	Yes
CZ	ČD Cargo		Yes	14		Yes			Yes
CZ	SŽ		Yes	36			Yes	Yes	Yes
DE	DB		Yes	80	Yes	Yes	Yes	Yes	Yes
DK	DSB	Yes	Yes	100	Yes			Yes	Yes
EE	Estonian Railways		Yes	53			Yes	Yes	
EL	Hellenic Train		Yes	50	Yes	Yes			
EL	OSE		Yes				Yes	Yes	
EL	PEARL		Yes			Yes			Yes
ES	Grupo Renfe		Yes	7	Yes	Yes		Yes	
FI	VR								
FR	*SNCF*	Yes	Yes	100	Yes	Yes	Yes	Yes	Yes
HR	HŽ Cargo		Yes	13		Yes			
HR	HŽ Infrastruktura		Yes	58			Yes	Yes	
HR	HŽPP		Yes	13	Yes				
HU	GYSEV	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
HU	MÁV Group		Yes	90	Yes	Yes	Yes	Yes	Yes
IE	*IÉ*		Yes	100	Yes	Yes	Yes	Yes	

Member State	CER affiliate	Involved in collective bargaining at the sector level for the railway sector	Involved in collective bargaining at the company level for the railway sector	Proportion of the national railway sector workforce covered by the collective bargaining in which this company is involved (%)	Parts of the sector covered by the collective bargaining in which the affiliate is involved				
					Passenger transport	Freight transport	Operation of railway infrastructure (e.g. tracks, signalling)	Operation of stations/terminals	Intermediation service activities
IT	FSI	Yes	Yes	100	Yes	Yes	Yes	Yes	
LT	LTG Group		Yes	96	Yes	Yes	Yes	Yes	
LU	CFL Cargo		Yes	7		Yes			
LU	CFL Group								
LU	CFL Multimodal		Yes	8		Yes			
LV	LDZ		Yes	100	Yes	Yes	Yes	Yes	Yes
LV	RB Rail		Yes	100			Yes	Yes	
NL	NS	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
PL	*PKP PLK*		Yes	Majority			Yes	Yes	Yes
PL	PKP S.A.		Yes	Majority	Yes	Yes	Yes	Yes	Yes
PT	CP		Yes	50 ([46])	Yes				
RO	CFR		Yes	51			Yes	Yes	Yes
RO	CFR Călători		Yes	21	Yes				
SE	SJ	Yes	Yes	95	Yes	Yes	Yes	Yes	Yes
SI	SŽ	Yes	Yes	30	Yes	Yes	Yes	Yes	
SK	ŽSR		Yes	42			Yes	Yes	
SK	ZSSK		Yes	18	Yes				Yes
SK	ZSSK Cargo		Yes	18		Yes			Yes
Total		**7**	**37**		**21**	**20**	**20**	**24**	**16**

Notes: Blank cells indicate no coverage of the category; italic font indicates companies also affiliated to EIM. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

([46]) Based on the information provided by the company to Eurofound correspondents. This has been triangulated with the evidence that CP employs 3 434 workers covered by collective bargaining, or around 50% of the 6 479 railway sector workers in the country (see Section 1, Table 2).

4.2.3. CER member organisations' representative status at the national level

Overall, across the EU-25, 26 employer organisations, or 74 % of all 35 sector-related employer organisations, across 15 Member States are considered representative, based on national recognition criteria (see Table 33).

Data related to the representativeness of CER-affiliated employer organisations based on national criteria are shown in Table 33Table 32. Almost all CER affiliates (four out of five) are considered representative. The exception is Germany's VDV (which is a business association), which is not considered representative.

These criteria are not applicable to companies, so affiliated companies are not included in the table.

Table 32: Representative status of CER-affiliated employer organisations, EU-25, 2024

	Number of EOs recognised as representative based on national recognition criteria
Total number of railway EOs considered representative (% of the 35 identified EOs)	26 (74 %)
Number of Member States	15
Number of EOs affiliated to CER that are considered representative (% of the 5 affiliated EOs)	4 (80 %)
Number of Member States	4

Note: EO; employer organisation.

Source: Network of Eurofound Correspondents.

Of CER-affiliated employer organisations, most (three) consider themselves employer organisations. The exceptions are Germany's VDV, which defines itself as a business association, and Austria's FVSCH, which describes itself as both an employer organisation and a business association.

4.3. CER's structures to ensure its members' effective participation

The data collected by Eurofound correspondents reflect a high level of engagement in CER among its employer organisation and company affiliates, with the vast majority participating in management bodies, paying affiliation fees and actively engaging in working groups (see Table 34).

Out of the five CER employer organisation affiliates, four are actively involved in decision-making structures and pay membership fees to CER for their railway sector members (for the remaining employer organisation affiliate, Belgium's HR Rail, these data were not available). Three employer organisation affiliates participate actively in the CER's work, such as its working groups. Also, two employer organisation affiliates are involved in the ESSDC for the railway sector on behalf of CER.

Table 33: Sectoral employer organisations' involvement in CER bodies, EU-25, 2024

Member State	CER affiliate	Actively involved in CER's decision-making structures	Paying membership fees to CER	Actively involved in CER activities	Involved in the railway ESDDC on CER's behalf
AT	FVSCH	Yes	Yes		
BE	*HR Rail*	n.d.	n.d.	n.d.	n.d.
DE	AGV MOVE	Yes	Yes	Yes	Yes
DE	VDV ([47])	Yes	Yes	Yes	
SE	Tågföretagen	Yes	Yes	Yes	Yes
Total	**5**	**4**	**4**	**3**	**2**

Notes: Blank cells indicate no coverage of the category; italic font indicates organisations also affiliated to EIM. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

Out of the 42 CER company affiliates, 25 are actively involved in decision-making structures and 32 pay membership fees to CER for their railway sector members (for the remaining affiliated companies, these data were not available; see Table 35). Most affiliates (26) participate actively in CER's work, such as its working groups. Also, 15 affiliates are involved in the ESSDC for the railway sector on behalf of CER. The distribution of engagement across countries and companies indicates both strong centres of involvement – such as in Austria, Czechia, France and Germany – and notable gaps, where some affiliates contribute minimally or not at all, often due to a lack of available information or reported non-participation. This highlights both the breadth and the limitations of sectoral company involvement in CER's organisational network.

Table 34: Sectoral companies' involvement in CER bodies, EU-25, 2024

Member State	CER affiliate	Actively involved in CER's decision-making structures	Paying membership fees to CER	Actively involved in CER activities	Involved in the ESSDC on CER's behalf
AT	GYSEV/Raaberbahn	n.d.	n.d.	n.d.	n.d.
AT	ÖBB Holding	Yes	Yes	Yes	Yes
BE	NMBS-SNCB	n.d.	n.d.	n.d.	n.d.
BG	БДЖ – Пътнически превози		Yes		
BG	БДЖ – Товарни превози		Yes		
BG	НКЖИ				
CZ	ČD	Yes	Yes	Yes	Yes
CZ	ČD Cargo	Yes	Yes		
CZ	SŽ	Yes	Yes	Yes	Yes
DE	DB	Yes	Yes	Yes	Yes
DK	DSB	Yes	Yes	Yes	
EE	Estonian Railways	Yes	Yes	Yes	
EL	Hellenic Train	No	Yes		

([47]) VDV is a business association, not an employer organisation.

Member State	CER affiliate	Actively involved in CER's decision-making structures	Paying membership fees to CER	Actively involved in CER activities	Involved in the ESSDC on CER's behalf
EL	OSE	Yes			
EL	PEARL	Yes	Yes	Yes	Yes
ES	Grupo Renfe	Yes	Yes	Yes	Yes
FI	VR	Yes		Yes	
FR	*SNCF*	Yes	Yes	Yes	Yes
HR	HŽ Cargo		Yes	Yes	
HR	HŽ Infrastruktura		Yes	Yes	
HR	HŽPP		Yes	Yes	
HU	GYSEV	n.d.	n.d.	n.d.	n.d.
HU	MÁV Group		Yes	Yes	Yes
IE	*IÉ*	Yes	Yes	Yes	Yes
IT	FSI	Yes	Yes	Yes	Yes
LT	LTG Group	Yes	Yes		
LU	CFL Cargo	Yes	Yes	Yes	
LU	CFL Group	Yes	Yes	Yes	Yes
LU	CFL Multimodal	Yes	Yes	Yes	
LV	LDZ	Yes	Yes	Yes	
LV	RB Rail		Yes	Yes	
NL	NS	n.d.	n.d.	n.d.	n.d.
PL	*PKP PLK*	Yes	Yes	Yes	
PL	PKP S.A.	Yes	Yes	Yes	Yes
PT	CP	Yes	Yes	Yes	Yes
RO	CFR	Yes	Yes	Yes	Yes
RO	CFR Călători	Yes	Yes		
SE	SJ	Yes	Yes	Yes	Yes
SI	SŽ		Yes		
SK	ŽSR				
SK	ZSSK				
SK	ZSSK Cargo				
Total	**42**	**25**	**32**	**26**	**15**

Notes: Blank cells indicate no coverage of the category; italic font indicates companies also affiliated to EIM. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

4.4. CER's negotiation capacity

As stated in the Introduction, one of the European Commission's criteria for EU-level social partners to be consulted, as described in Commission Decision 98/500/EC, is for them to represent organisations that are themselves an integral and recognised part of Member States' social partner structures (covered in Section 3.2.1). Additionally, they must also have the capacity to negotiate labour agreements and be representative of several Member States. Based on Article 155 of the

TFEU, European sectoral social partner organisations need to prove their capacity to negotiate on behalf of their members and to enter 'contractual relations, including agreements' (Article 155 of the TFEU), that is, their capacity to commit themselves and their national affiliates. A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates or if it can receive such a mandate in accordance with a given mandating procedure.

Eurofound applies the criterion of the 'capacity to negotiate' to both the EU-level partner associations and, in a bottom-up approach, the national organisations in order to assess their relevance. Following these arguments, the standard Eurofound methodology for assessing the criteria of being an 'integral part of Member State industrial relations' and having the 'capacity to negotiate' applies the 'capacity to negotiate agreements' at both the EU and national levels. The mandate / mandating procedure can be either **statutory** (i.e. laid down in the constitution of the organisation or annexed to it) or **non-statutory** (i.e. laid down in secondary documents, such as rules of procedure, memoranda of understanding and/or ad hoc decisions by the organisation's governing bodies). Finally, in the absence of the above procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in binding agreements, declarations, joint opinions and so on.

According to CER's constitution (CER, 2016), three main bodies are responsible for the governance of the organisation: the CER Management Committee, the CER General Assembly and the CER Assistants Group. The Management Committee, consisting of a chair and four vice-chairs, is responsible for providing recommendations to the General Assembly. The General Assembly, which is CER's decision-making body, consists of representatives of all the member organisations, each holding one seat, and a chief executive. According to Article 10 of CER's constitution,

> *the General Assembly shall have full powers in fulfilling the Association's purpose. It shall consist of full and associate members, represented by persons with the status of Chairman or Director General or equivalent, or by other executives with adequate ranking, such as board member or head of international relations, explicitly designated by them to this end*.

While the constitution describes a general voting procedure, it does not explicitly mention whether the voting mandate can be used to conclude agreements. Specifically, Article 12 states that

> *the number of votes of full and associate members at the General Assembly shall correspond in each case to the percentage that an individual fee represents of the total fees for the current financial period at the date of the General Assembly meeting. The right to vote is linked to the payment of the annual service fee. Members that have not settled the invoiced membership fee will lose their right to vote until their debt towards the Association is settled.*

Additionally, Article 14 provides that

> *decisions of the General Assembly shall be adopted based on a two-thirds majority of votes cast, without taking abstentions into account.*

Finally, the CER Assistants Group, consisting of the international or European affairs managers of the CER members, is a liaison group tasked with ensuring communication and cooperation between CER and its members.

Additionally, in the day-to-day operations of CER and in order to ensure the preparation, coordination and implementation of the work of the ESSDC for the railway sector, two central bodies

play an important role: the CER Human Resources Directors Group and its Steering Committee, which bring together HR leaders from member companies to discuss workforce-related challenges and coordinate positions on EU social and employment policies affecting the railway sector. These groups contribute to CER's work on skills development, training, workforce planning, health and safety and the attractiveness of rail careers. In sum, CER has a **statutory provision** that indicates that its General Assembly oversees and decides on entering negotiations and concludes sectoral agreements. The conclusion of several joint agreements in the railway ESSDC also indicates a sufficient capacity to negotiate and conclude agreements as provided for in Article 155 of the TFEU.

4.5. CER members' effective participation in the railway sector ESSDC

Commission Decision 98/500/EC from 1998, on the establishment of ESSDCs, stipulates in its Article 1(c) that European social partner organisations 'shall have adequate structures to ensure their effective participation in the work of the Committees'. The adequacy of the structures to enable CER to represent its members on the ESSDC, in European Commission consultations and in the negotiation of binding agreements has been analysed in the previous section. In this section, the effective participation of CER's members, both employer organisations and companies, in railway sector ESSDC meetings is outlined in Table 36.

Based on data shared by the European Commission, delegates from 12 Member States, in addition to the CER Secretariat, were represented at the railway ESSDC meetings held in 2023, 2024 and 2025. CER affiliates from these 12 countries also confirmed their participation in ESSDC meetings on behalf of CER to the Eurofound correspondents (Section 4.3). Additionally, CER members from another three Member States (Greece, Hungary and Romania) mentioned their participation in the ESSDC meetings on behalf of CER, despite not being recorded on the attendance lists between 2022 and 2024.

Table 35: Overview of CER members' (employer organisations and companies) participation in railway sector ESSDC meetings, 2023–2025

Participation	Member States	Number of Member States
Employer organisation and company delegates from	**AT, BE, BG, CZ, DE, DK, FR, IE, IT, LU, PL, SK**	12/25
Countries in which CER has employer organisation and company members but no delegates participating in meetings between 2022 and 2024	EE, *EL*, ES, FI, HR, *HU*, LV, LT, NL, PT, *RO*, SE, SI	13/25

Notes: Bold font used for countries on the attendance list provided by the European Commission Directorate-General for Employment, Social Affairs and Inclusion and whose attendance was confirmed by CER affiliates to the Eurofound correspondents during data collection; italic font indicates countries that are not listed on the attendance list but indicated that they participated in these meetings to Eurofound correspondents.

Sources: European Commission and Network of Eurofound Correspondents.

5. European Rail Infrastructure managers (EIM)

EIM represents both employer organisations and individual railway companies. EIM's representativeness is detailed on the scoreboard (see Figure 8), covering both EIM member employer organisations and member companies.

The figure illustrates on the right, in blue, that 2 out of 35 sector-related employer organisations (6 %) are affiliated to EIM in Belgium and Poland (no employer organisations exist in Bulgaria, Croatia, Estonia, Greece, Ireland, Latvia, Luxembourg or the Netherlands). In addition, 12 companies are affiliated to EIM, and these are located in Belgium, Denmark, Finland, France, Ireland, the Netherlands, Poland, Portugal, Spain and Sweden. Thus, EIM has at least one member (employer organisation or company) in 10 Member States.

Figure 8: Scoreboard of the representativeness of EIM, railway sector, EU-25, 2024

<table>
<tr><td>2 out of 35 railway sector employer organisations are affiliated to EIM (6 %)</td><td colspan="3">EIM has at least one member employer organisation or company in 10 Member States</td></tr>
<tr><td rowspan="9">
</td><td>AT</td><td>FI</td><td>NL</td></tr>
<tr><td>BE</td><td>FR</td><td>PL</td></tr>
<tr><td>BG</td><td>HR</td><td>PT</td></tr>
<tr><td>CZ</td><td>HU</td><td>RO</td></tr>
<tr><td>DE</td><td>IE</td><td>SE</td></tr>
<tr><td>DK</td><td>IT</td><td>SI</td></tr>
<tr><td>EE</td><td>LT</td><td>SK</td></tr>
<tr><td>EL</td><td>LU</td><td></td></tr>
<tr><td>ES</td><td>LV</td><td></td></tr>
</table>

Notes: The blue part of the chart corresponds to the number of sectoral employer organisations affiliated to EIM. Blue-shaded cells indicate Member States in which EIM has at least one affiliate: a company or a sectoral employer organisation. Bold font indicates countries in which EIM has both affiliated companies and employer organisations.

Source: Network of Eurofound Correspondents.

Of the total 1 202 companies in the railway sector in the 25 Member States included in this study, there are 1 117 affiliated to a sectoral employer organisation. This is based on estimates from experts and information provided by 29 of 35 sectoral employer organisations and therefore is probably an underestimate. The Belgian employer organisation affiliated to EIM reports that it has two affiliated sectoral companies (no data are available for the Polish EIM-affiliated employer organisation; see Table 37). Together with the 12 companies that are direct members of EIM, this represents 14 companies and corresponds to 1.3 % of all companies affiliated to an employer organisation or around 1.2 % of all railway sector companies. The 14 companies and employer organisations that are EIM members employ around 17 % of the entire European sectoral workforce (around 156 951 workers are employed by employer organisations and companies affiliated to EIM of the 903 463 workers in this sector in the EU-25).

Of the two employer organisations EIM represents, Belgium's HR Rail is the largest employer organisation in the country, with two of its member companies employing 25 000 workers (around 3 % of the total number of sector workers in the EU-25). There were no data available on the membership strength of the EIM-affiliated employer organisation in Poland, CPK (see Table37).

Among the 12 EIM company affiliates, four are the largest company in the sector in the country, while five are the second largest company in the sector in the country. Together, EIM company affiliates employ around 156 951 workers (or around 17 % of the total number of sector workers in the EU-25; see Table 38).

Table 36: Membership strength of employer organisations affiliated to EIM, EU-25, 2024

Member State	Number of EIM-affiliated EOs / total number of EOs	Including the largest EO	Including the second largest EO	Number of companies affiliated to all the sectoral EOs in the Member State	Number of companies affiliated to EIM members	Total number of railway sector companies	Share of EIM member companies in the number of companies in the railway sector (%)
BE	1/2	Yes	No	9	2	9	22
PL	1/5	n.d.	n.d.	135	n.d.	126	n.d.
Total	**2/35**	**1**	**0**	**144**	**2**	**135**	**n.d.**

Notes: EO, employer organisation; n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

Table 37: Membership strength of companies affiliated to EIM, EU-25, 2024

Member State	EIM company member	Ranking in the sector by membership size	Collective workforce in the railway sector in the country
BE	Infrabel	Second	9 723
DK	Banedanmark	Second	1 729
ES	ADIF	Largest	23 113
FI	Väylä	Second	9 500
FR	Eurotunnel	Small	1 485
FR	Lisea	n.d.	1 527
FR	*SNCF Réseau* ([48])	Largest	50 000
IE	*IÉ*	Largest	4 685
NL	Prorail	Second	5 500
PL	*PKP PLK*	Largest	35 836
PT	IP	Second	4 833
SE	Trafikverket	Government agency	9 000
Total	**12**	**Largest: 4** **Second largest: 5**	**156 951**

Note: Italic font indicates companies also affiliated to CER.

Source: Network of Eurofound Correspondents.

([48]) SNCF Réseau is a subsidiary of SNCF. Only SNCF Réseau indicated affiliation to EIM.

Table 39 compares the number of EIM-affiliated employer organisations and companies in 2017 (when the last representativeness study was undertaken) with the number in 2024 ([49]). Overall, the number of EIM-affiliated employer organisations increased from none in 2017 to two in 2024 (these are the previously mentioned Belgian HR Rail and Polish CPK). The number of companies EIM represents directly also increased from 8 in 2017 to 12 in 2024, with four new members as follows: Väylä in Finland, IÉ in Ireland, IP in Portugal and Trafikverket in Sweden.

Table 38: EIM affiliates, EU-25, 2017 and 2024

Member State	Affiliate in 2024	Member State	Affiliate in 2017
BE	*HR Rail*		
BE	Infrabel	BE	Infrabel
DK	Banedanmark	DK	Banedanmark
ES	ADIF	ES	ADIF
FI	Väylä		
FR	Eurotunnel	FR	Eurotunnel
FR	Lisea	FR	Lisea
FR	*SNCF Réseau*	FR	SNCF
IE	*IÉ*		
NL	Prorail	NL	Prorail
PL	CPK		
PL	*PKP PLK*	PL	PLK (*)
PT	IP		
SE	Trafikverket		

(*) Names of organisations and companies whose names have changed since 2017 as a result of rebranding or renaming.

Notes: Italic font indicates employer organisations and companies also affiliated to CER. The employer organisations discussed in 2017 were included if they covered the railway sector NACE codes. Organisations only organising in the urban transport activities sector were excluded from the count.

Source: Network of Eurofound Correspondents.

5.1. Sector-relatedness of EIM and its member organisations in the railway sector

The sector-relatedness of EIM affiliates was assessed by examining by the parts of the railway sector covered by EIM-affiliated employer organisations and companies. The EIM affiliates are, in total, two employer organisations and 12 companies, the latter of which employ around 156 951 railway sector workers.

First, the analysis of the two EIM-affiliated employer organisations is provided (see Table 40). No data were available for the one employer organisation in Poland, CPK. Looking at the different parts of the railway sector, the other employer organisation affiliated to EIM has member companies in all parts of the railway sector. The presence of EIM-affiliated employer organisations is quite limited compared to the total number of employer organisations operating in each domain of the railway sector. In particular, while there are 22 employer organisations representing passenger transport

([49]) The employer organisations discussed in 2017 were included if they covered the railway sector NACE codes. Organisations only representing urban transport activities were excluded from the count.

companies across 14 Member States, only one of them is affiliated to EIM, representing just 5 % of the total employer organisations active in this part of the sector. This pattern is consistent across freight transport, infrastructure operation, station and terminal operation, and intermediation service activities, with each showing only one EIM-affiliated employer organisation, typically comprising between 4 % and 6 % of the relevant employer organisations.

Second, the analysis provided for the 12 companies affiliated to EIM (see Table 41) highlights the distribution of EIM company members across the different parts of the railway sector – passenger and freight transport, infrastructure operation, the management of stations/terminals and intermediation service activities. Notably, the EIM company member SNCF Réseau in France demonstrates comprehensive sectoral coverage, actively participating in all listed categories. In contrast, other companies have a narrower focus, with several, including Banedanmark in Denmark and PKP PLK in Poland, specialising in the operation of rail infrastructure. There are clear disparities in the coverage of passenger services and intermediation service activities, suggesting diverse strategic priorities and regulatory environments across the Member States.

The overall trends underscore this variation: out of the 12 EIM member companies, 11 EIM company members are active in freight transport, three in passenger transport, seven in the operation of railway infrastructure, four in the operation of stations/terminals and three in intermediation service activities for railway services.

Table 39: Sectoral coverage of EIM-affiliated employer organisations, EU-25, 2024

Part of the railway sector	Number of EOs representing companies in this part of the railway sector	Number of EIM EO affiliates representing companies in this part of the railway sector	% of EOs affiliated with EIM	Member States with an EO	Member States with an EIM-affiliated EO	Member States with EOs representing workers not affiliated to EIM
Passenger transport	22	1	5	14	1	13
Freight transport	28	1	4	16	1	15
Operation of railway infrastructure (e.g. tracks, signalling)	21	1	5	15	1	14
Operation of stations/terminals	21	1	5	15	1	14
Intermediation service activities	18	1	6	12	1	11

Note: EO, employer organisation.

Source: Network of Eurofound Correspondents.

Table 40: Sectoral coverage of companies affiliated to EIM, EU-25, 2024

Member State	EIM affiliate	Parts of the railway sector where their companies are active				
		Passenger transport	Freight transport	Operation of railway infrastructure	Operation of stations/terminals	Intermediation service activities ([50])
BE	Infrabel		Yes			
DK	Banedanmark		Yes	Yes		
ES	ADIF		Yes			
FI	Väylä		Yes			
FR	Eurotunnel	Yes	Yes	Yes		Yes
FR	Lisea		Yes			
FR	*SNCF Réseau*	Yes	Yes	Yes	Yes	Yes
IE	*IÉ*	Yes	Yes	Yes		Yes
NL	Prorail		Yes	Yes	Yes	
PL	*PKP PLK*			Yes	Yes ([51])	
PT	IP		Yes	Yes		
SE	Trafikverket		Yes		Yes	
Total		**3**	**11**	**7**	**4**	**3**

Notes: Blank cells indicate no coverage of the category; italic font indicates companies also affiliated to CER.

Source: Network of Eurofound Correspondents.

In terms of company size, one EIM employer organisation, HR Rail in Belgium, has two member companies, both of which are large, employing over 250 workers. No data were found on the second EIM-affiliated employer organisation, CPK, in this respect.

5.2. EIM's role in the sectoral industrial relations landscape

Commission Decision 98/500/EC of 1998, in its Article 1(b), includes three criteria to be assessed separately to determine whether social partner organisations are representative:

- whether the affiliated sectoral employer organisations are an integral and recognised part of the sectoral social dialogue structures in the Member State, through involvement in bipartite or tripartite social dialogue, or by being consulted by government institutions ([52]);
- the extent to which affiliated employer organisations have the capacity to negotiate agreements determining the working conditions of the sectoral workforce – in other words, whether they are involved in collective bargaining – and the proportion of the workforce that is covered by collective bargaining;

([50]) Such services typically refer to brokering, arranging or facilitating access to rail-related services, such as capacity allocation, ticketing or access to service facilities.

([51]) The affiliate clarified that this should be considered partly covered. It manages platforms and passenger information but not station buildings for passenger service.

([52]) In the context of this study, bipartite social dialogue is between trade unions and employer organisations; tripartite social dialogue is between trade unions, employer organisations and government representatives. Bilateral consultations are between government and trade unions and/or between government and employer organisations. Each configuration involves mutual recognition.

- the number of affiliated sectoral employer organisations that are considered representative in the national industrial relations setting, and the number of Member States in which this is the case.

5.2.1. Integral and recognised part of Member States' industrial relations structures

Table 42 illustrates the significant scale of the representation and influence of employer organisations and companies affiliated with EIM have in the railway sector's social and industrial relations landscape in different Member States.

Among the 35 railway sector employer organisations identified in the EU-25, 15 employer organisations, which represent 43 % of the total, participate in sector-related bipartite or tripartite social dialogue bodies. These organisations are distributed across 10 Member States. Nineteen employer organisations, accounting for 54 % of the total, are affiliated with national confederations, which are present in 13 Member States. Some 23 employer organisations, representing a significant 66 % of all employer organisations in the sector, are consulted by governments on sector-related matters across 13 Member States.

As shown in Table 42, six EIM company affiliates and one employer organisation affiliate ([53]) are involved in the national bipartite or tripartite social dialogue related to the railway sector in eight Member States. Eight company affiliates and the Belgian affiliated employer organisation HR Rail are consulted by the government on sector-related matters in eight Member States. Seven company affiliates and the Belgian employer organisation HR Rail are affiliated to a cross-industry national employer organisation / business association in seven Member States.

Table 41: EIM employer organisation affiliates involved in social dialogue in the railway sector, EU-25, 2024

	Involved in a bipartite or tripartite social dialogue body	Affiliated to a national confederation	Consulted by government on sector-related matters
Total number of railway employer organisations (% of 35 identified employer organisations)	15 (43 %)	19 (54 %)	23 (66 %)
Number of Member States	10	13	13
Number of employer organisations affiliated to EIM (% of 2 affiliated employer organisations)	1 (50 %)	0 (0 %)	1 (50 %)
Number of Member States	1	1	1

Source: Network of Eurofound Correspondents.

Table 43 provides an overview of EIM company affiliates' engagement in social dialogue within the European railway sector in 2024, demonstrating their varied involvement across countries. Notably, EIM company affiliates in Belgium, Finland, France, Ireland and the Netherlands actively participate in national bipartite or tripartite social dialogue and are regularly consulted by their governments on

([53]) No data were available for the other employer organisation affiliate, CPK in Poland.

sector-specific matters, with several also affiliated to cross-industry national employer organisations. Some affiliates, such as those in Denmark, Portugal and Spain, show less engagement. In France, diversity in company involvement is evident, with SNCF Réseau deeply involved in multiple aspects of the sector, while Lisea and Eurotunnel are mainly linked through affiliation to a national confederation. The data suggest that, while engagement in social dialogue is widespread, the degree and form of participation vary substantially.

Table 42: EIM company affiliates involved in social dialogue in the railway sector, EU-25, 2024

Member State	EIM affiliate	Involved in national sectoral bipartite or tripartite social dialogue	Consulted by the government on sector-related matters	Affiliated to a cross-industry national confederation
BE	Infrabel	Yes	Yes	Yes
DK	Banedanmark		Yes	
ES	ADIF			
FI	Väylä	Yes	Yes	Yes
FR	Eurotunnel			Yes
FR	Lisea			Yes
FR	*SNCF Réseau*	Yes	Yes	Yes
IE	*IÉ*	Yes	Yes	Yes
NL	Prorail	Yes	Yes	
PL	*PKP PLK*	Yes	Yes	
PT	IP			
SE	Trafikverket		Yes	Yes
Total	**12**	**6**	**8**	**7**

Notes: Blank cells indicate no coverage of the category; italic font indicates companies also affiliated to CER.

Source: Network of Eurofound Correspondents.

5.2.2. Capacity to negotiate collective bargaining agreements

The tables below show the participation of EIM affiliates, both employer organisations and companies, in the collective bargaining processes in the railway sector in their Member States.

Some 17, or 49 %, of all railway sector employer organisations in the EU-25 are involved in some form of sectoral collective bargaining in the sector, whether at the sectoral or company level (see Table 44). This is the case in 11 countries with employer organisations. There are six countries where no employer organisation is involved in any form of sector-related collective bargaining (Czechia, Hungary, Portugal, Romania, Slovakia and Slovenia).

Eleven EIM-affiliated companies and one employer organisation – the Belgian HR Rail ([54]) – are involved in collective bargaining at the sector and/or company level for the railway sector (see Table 44). The proportion of the national railway sector workforce covered by the collective bargaining in which the EIM-affiliated employer organisations and companies are involved is very high, on average around 90 %. It is noteworthy that for five affiliates no data on collective bargaining coverage were provided.

([54]) No data were available for the other employer organisation affiliate, CPK in Poland.

Table 43: Overview of EIM-affiliated employer organisations' involvement in railway sector collective bargaining, EU-25, 2024

	All EOs	**EOs affiliated to EIM**		
	Total number of railway sector EOs involved in any collective bargaining	Number of EIM-affiliated employer organisations involved in any collective bargaining (% of 2 EIM-affiliated EOs)	Sector level	Company level
Number of EOs (% of 35 identified EOs)	17 (49 %)	1 (50 %)	1 (50 %)	1 (50 %)
Number of Member States	11	1	1	1
	AT, BE, DK, DE, ES, FI, FR, IT, LT, PL, SE	BE	BE	BE
Member States in which none of the railway EOs are involved in collective bargaining	18 EOs in 6 Member States (CZ, HU, PT, RO, SI, SK) (51 %)			

Note: EO, employer organisation.

Source: Network of Eurofound Correspondents.

Looking at the different parts of the railway sector covered in the collective bargaining (see Table 45), four EIM-affiliated companies and the Belgian employer organisation affiliate are involved in collective bargaining for passenger transport, four EIM affiliates in collective bargaining for freight transport, nine companies and the Belgian employer organisation affiliate in collective bargaining for the operation of railway infrastructure, 10 companies and the Belgian employer organisation affiliate in collective bargaining for the operation of stations/terminals and finally two companies and the Belgian employer organisation affiliate in collective bargaining for intermediation service activities for railway services.

Table 44: Overview of EIM employer organisation and company affiliates' involvement in railway sector collective bargaining, EU-25, 2024

Member State	EIM affiliate	Involved in collective bargaining at the sector level for the railway sector	Involved in collective bargaining at the company level for the railway sector	Proportion of the national railway sector workforce covered by the collective bargaining in which this EO is involved (%)	Parts of the sector covered by the collective bargaining in which the affiliate is involved				
					Passenger transport	Freight transport	Operation of railway infrastructure	Operation of stations/ terminals	Intermediation service activities
Employer organisations									
BE	HR Rail	Yes	Yes	Majority	Yes	No	Yes	Yes	Yes
PL	CPK	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
Companies									
BE	Infrabel	Yes	Yes	Majority			Yes	Yes	
DK	Banedanmark	Yes	Yes	n.d.			Yes	Yes	
ES	ADIF			n.d.				Yes	
FI	Väylä								
FR	Eurotunnel	Yes		100	Yes	Yes	Yes	Yes	
FR	Lisea	Yes		100	Yes	Yes	Yes	Yes	
FR	*SNCF Réseau*	Yes	Yes	100	Yes	Yes	Yes	Yes	Yes
IE	*IÉ*		Yes	100	Yes	Yes	Yes	Yes	
NL	Prorail		Yes	15			Yes	Yes	Yes
PL	*PKP PLK*		Yes	Majority			Yes	Yes (*)	Yes
PT	IP		Yes	30			Yes	Yes	
SE	Trafikverket								
Total (for companies only)		**5**	**7**		**4**	**4**	**9**	**10**	**3**

(*) Indicates partial coverage – PKP PLK manages platforms and passenger information but not station buildings for passenger services.

Notes: Blank cells indicate no coverage of the category; italic font indicates companies also affiliated to CER. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

5.2.3. EIM member organisations' representativeness at the national level

Overall, across the EU-25, 26 employer organisations, or 74 % of all 35 sector-related employer organisations, across 15 Member States are considered representative, based on national recognition criteria (see Table 46).

Among the two employer organisations affiliated to EIM, data related to their representativeness that are based on national criteria were provided for only one: the Belgian HR Rail, which is considered representative ([55]). As the criteria are not applicable to companies, they are not included in the table.

Table 45: Representative status of EIM-affiliated employer organisations, EU-25, 2024

	Number of EOs recognised as representative based on national recognition criteria
Total number of railway EOs (% of the 35 identified EOs)	26 (74 %)
Number of Member States	15
Number of EOs affiliated to EIM (% of the 2 affiliated EOs)	1 (50 %)
Number of Member States	1

Note: EO, employer organisation.

Source: Network of Eurofound Correspondents.

5.3. EIM's structures to ensure its members' effective participation

The data collected by Eurofound correspondents reflect a high level of engagement in EIM among its affiliates, with the majority participating in management bodies, paying affiliation fees and actively engaging in working groups (see Table 47).

Table 47 presents an overview of the involvement of sectoral employer organisations and affiliate company in EIM decision-making and activities across several European countries in 2024. Out of the 14 EIM affiliates, six are actively involved in decision-making structures and pay membership fees to EIM for their railway sector members, while seven did not provide these data to the Eurofound correspondents. Seven EIM affiliates indicated their active participation in EIM's work, such as its working groups. Also, four EIM affiliates indicated to the Eurofound correspondents that they have participated in the railway ESSDC on behalf of EIM. However, according to the data shared by the European Commission (see Section 5.5, Table 48), only one delegate, representing the EIM Secretariat, attended one ESSDC meeting in March 2024. None of the EIM-affiliated employer organisations or companies from Belgium, Denmark, Finland, the Netherlands, Poland, Portugal, Spain or Sweden is recorded on the attendance lists between 2022 and 2024. One of the EIM members from France – SNCF – and the Irish member IÉ, both of which are also CER members, indicated that they took part in an ESSDC meeting for the railway sector. It is important to note that both companies are also CER affiliates and have indicated that they attended the ESSDC rail meeting on behalf of CER (see Section 4.3), and their attendance was recorded as such (see Section 4.5). Table 47 also highlights gaps in information, especially for certain organisations in Belgium, France, Poland and Portugal, where the EIM affiliates have not provided information on their involvement to

([55]) No data were available for the other employer organisation affiliate, CPK in Poland.

the Eurofound correspondents. Overall, the data underscore EIM members' limited engagement and participation in its structures and activities.

Table 46: Sectoral employer organisations and companies' involvement in EIM bodies, EU-25, 2024

Member State		EIM affiliate	Actively involved in EIM's decision-making structures	Paying membership fees to EIM	Actively involved in EIM activities	Involved in the railway ESSDC on EIM's behalf
	Employer organisations					
BE		*HR Rail*	n.d.	n.d.	n.d.	n.d.
PL		CPK	n.d.	n.d.	n.d.	n.d.
	Companies					
BE		Infrabel	n.d.	n.d.	n.d.	n.d.
DK		Banedanmark	Yes	Yes		
ES		ADIF	n.d.	n.d.	n.d.	n.d.
FI		Väylä	No	Yes	Yes	
FR		Eurotunnel	n.d.	n.d.	n.d.	n.d.
FR		Lisea	n.d.	n.d.	n.d.	n.d.
FR		*SNCF Réseau*	Yes	Yes	Yes	Yes
IE		*IE*	Yes	Yes	Yes	Yes
NL		Prorail	Yes	Yes	Yes	Yes
PL		*PKP PLK*	Yes	Yes	Yes	
PT		IP	n.d.	n.d.	n.d.	n.d.
SE		Trafikverket	Yes	Yes	Yes	Yes
Total (for companies only)		**12**	**6**	**7**	**6**	**4**

Notes: Blank cells indicate no coverage of the category; italic font indicates employer organisations and companies also affiliated to CER. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

5.4. EIM's negotiation capacity

As stated in the Introduction, one of the European Commission's criteria for EU-level social partners to be consulted, as described in Commission Decision 98/500/EC, is for them to represent organisations that are themselves an integral and recognised part of Member States' social partner structures (covered in Section 3.2.1). Additionally, they must also have the capacity to negotiate labour agreements and be representative of several Member States. Based on Article 155 of the TFEU, European sectoral social partner organisations need to prove their capacity to negotiate on behalf of their members and to enter 'contractual relations, including agreements' (Article 155 of the TFEU), that is, their capacity to commit themselves and their national affiliates. A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates or if it can receive such a mandate in accordance with a given mandating procedure.

Eurofound applies the criterion of the 'capacity to negotiate' to both the EU-level partner associations and, in a bottom-up approach, the national organisations in order to assess their relevance. Following these arguments, the standard Eurofound methodology for assessing the

criteria of being an 'integral part of Member State industrial relations' and having the 'capacity to negotiate' applies the 'capacity to negotiate agreements' at both the EU and national levels. The mandate / mandating procedure can be either **statutory** (i.e. laid down in the constitution of the organisation or annexed to it) or **non-statutory** (i.e. laid down in secondary documents, such as rules of procedure, memoranda of understanding and/or ad hoc decisions by the organisation's governing bodies). Finally, in the absence of the above procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in binding agreements, declarations, joint opinions and so on.

According to EIM's website, there are two main bodies responsible for the governance of the organisation: the Board and the General Assembly, which are complemented by non-management bodies, such as the Policy and Management Committee and the Technical Steering Group. According to EIM's statutes (2020), specifically Article 3.3, EIM's

> *main activities and statutory aim are to examine and take action on all issues relating to European Union action and intentions in the field of transport, in particular from the point of view of the rail sector, to analyse problems in relation to such issues and, where appropriate, to devise and implement solutions; to represent its members' interests effectively to the European authorities by interfacing with European institutions, service providers and other stakeholders; and to provide a forum for the exchange of best business practices and the management of joint activities for improving Europe's rail infrastructure. The Association shall carry out its aim by, in particular, developing policy positions, responding to queries from the European Institutions, participating in events organised by the European institutions, holding regular meetings of expert committees, maintaining a website and publishing a newsletter and position papers.*

Based on the above, EIM's statutory role is focused on technical, policy and strategic representation, rather than the negotiation of agreements with the trade unions.

Article 10.1 of EIM's legal statutes establishes that

> *The General Assembly is responsible for defining the general policy orientations of the Association; deciding on all major strategic and financial matters of the Association; and overseeing the Board of Directors and the operational management by the Executive Director. It shall have full powers for fulfilling the Association's purpose.*

Further, Article 12 clarifies the voting rights of EIM members, with Article 12.1 stating

> *Each National and Non-National Member shall have one vote.*
>
> *However, the total votes cast by the Non-National Members shall not be taken into account for more than one third (1/3) of the total votes cast by the National Members. In the event of a reduction of the votes of the Non-National Members as a result of the application of this rule, the vote of each Non-National Member will be reduced to a fraction of its vote in an equal manner for all Non-National Members, by dividing the maximum permissible reduced votes by the number of Non-National Members present or represented at the General Assembly. In the event that a vote is by e-mail, all members will be deemed to be present.*

Finally, Article 14 states

> *Dissolution of the Association as well as any amendment to Article 11 of the Statutes requires unanimity of the National and Non-National Members present at the General Assembly. …*

Any amendment of Articles 3, 8 and 12 of the Statutes shall be adopted on a four fifths majority of votes.

Any other amendments to the Statutes shall be adopted on a three fourth majority of the votes.

Any other decision of the General Assembly shall be adopted on a simple majority of votes.

In sum, EIM has a general voting procedure, but the statutes do not clarify whether the statutory mandating procedure can be used for the negotiation or ratification of agreements with European trade unions. However, the conclusion of several joint opinions and recommendations signed by ETF, CER and EIM as members of the railway ESSDC between 2006 and 2012 indicates a past **intrinsic capacity to negotiate** and conclude agreements as provided for in Article 155 of the TFEU.

5.5. EIM members' effective participation in the railway sector ESSDC

Commission Decision 98/500/EC from 1998, on the establishment of ESSDCs, stipulates in its Article 1(c) that European social partner organisations 'shall have adequate structures to ensure their effective participation in the work of the Committees'. The adequacy of the structures to enable EIM to represent its members on the ESSDC, in European Commission consultations and in the negotiation of binding agreements has been analysed in the previous section. In this section, the effective participation of EIM's members, both employer organisations and companies, in railway sector ESSDC meetings is outlined.

Based on data shared by the European Commission, only one delegate, representing the EIM Secretariat, attended one railway sector ESSDC meeting in March 2024. However, as listed in in Section 5.3, EIM member companies from France and Ireland have indicated their participation in the ESSDC meetings on behalf of EIM, despite not being recorded on the attendance lists, between 2022 and 2024. In the case of the member companies from France (SNCF Réseau) and Ireland (IÉ), this might be explained by them being affiliated to both CER and EIM and thus recorded as CER members in the ESSDC attendance data. It is also noteworthy that, during the several informal consultations conducted to perform quality checks and data validation for this study, EIM did not provide any feedback regarding the accuracy of information about its members.

Table 47: Overview of EIM members' (employer organisations and companies) participation in railway sector ESSDC meetings, 2023–2025

Participation	Member States	Number of Member States
Employer organisation and company delegates from	None, only the EIM Secretariat once	0
Countries in which EIM has employer organisation and company members but no delegates participating in meetings between 2022 and 2024	BE, DK, ES, FI, *FR*, *IE,* *NL*, PL, *PT*, SE	10

Note: Italic font indicates countries that are not listed on the attendance list but indicated that they participated in these meetings to the Eurofound correspondents.

Sources: European Commission and Network of Eurofound Correspondents.

6. Social partner organisations not represented on the railway sector ESSDC

This section details the analysis of the national trade unions and employer organisations that are not members of ETF's railway transport section, CER or EIM and are therefore not represented on the current railway sector ESSDC.

6.1. National sectoral trade unions not represented on the railway sector ESSDC

A total of 93 trade unions are not members of ETF's railway section and are thus not represented on the ESSDC for the railway sector (or 68 % of all 137 sectoral trade unions; see Table 49Table 48). They are active in 22 Member States, including Estonia, Portugal and Romania, the three countries in which ETF has no members for the railway sector.

The 93 unions not represented in the ESSDC together represent almost 220 000 members, which constitutes 24 % of the entire European sectoral workforce. For many trade unions (21 in total), such membership data were not available, so further analysis should be treated with caution. Of all employees in the railway sector in Europe, 640 053 are reported to be affiliated to a sectoral trade union. Thus, the almost 220 000 members of the 93 unions not represented in the railway sector ESSDC constitute around 34 % of total sectoral union membership.

In seven Member States, the largest trade union is not represented on the ESSDC. This is the case in Bulgaria, Estonia, Lithuania, the Netherlands, Poland, Portugal and Romania. In 10 Member States, the second largest trade union is not represented on the ESSDC. This is the case in Croatia, Czechia, Estonia, Germany, Greece, Portugal, Romania, Slovakia, Spain and Sweden.

The majority of unions (84 %, or 78 out of 93 unions) not represented on the ESSDC are considered to be representative at the national level, based on national recognition criteria. This is the case in all 22 Member States with such unions.

34 %, or 32 unions, are involved in national social dialogue bodies (bipartite, tripartite or both) for the sector in 15 Member States (Belgium, Bulgaria, Denmark, Finland, France, Germany, Greece, Hungary, Italy, the Netherlands, Poland, Romania, Slovakia and Slovenia).

56 %, or 52 unions, are consulted by the government on sector-related matters. This is the case in 16 Member States (Belgium, Croatia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Lithuania, the Netherlands, Poland, Portugal, Romania, Spain and Sweden).

29 %, or 26 unions across 11 Member States, are involved in the collective bargaining processes at the sector level (in Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Lithuania, the Netherlands, Slovenia and Sweden). The majority (88 %, or 82 unions) are involved in the collective bargaining processes at the company level, in all 21 Member States (all Member States with such unions except Lithuania). The coverage of collective bargaining processes where such unions are involved ranges from less than 1 % to 100 % of the sectoral workforce (the latter is the case in France, Ireland, Italy and Sweden), with an average rate of 53 %.

Eleven trade unions that are not members of ETF have reported affiliation to other European-level organisations, most frequently the Federation of European Train Drivers' Unions (ALE; originally Autonome Lokomotivführer-Gewerkschaften Europas) additional to SSH, the Croatian trade union that is a member of ETF as well as ALE. A more detailed analysis of this organisation is available in Section 7.1. CESI has one affiliated union in the sector among the unions not represented in the ESSDC, which is OVS/SIC in Belgium.

Table 48: Membership strength of national trade unions not represented on the railway sector ESSDC, 2024

Member State	Trade union	Members in the railway sector	Ranking in their Member State by membership size	Considered representative	Involved in social dialogue (bipartite/ tripartite)	Consulted by the government	Involved in collective bargaining at the sector level	Involved in collective bargaining at the company level	Proportion of workforce covered by collective bargaining in which this trade union is involved (%)	Affiliations to other European associations
BE	ABVV BBTK / FGTB SETCa	n.d.	Small	Yes	Yes	Yes	Yes	Yes	Small proportion	
BE	Metisp-Protect	n.d.	Small			Yes				
BE	OVS/SIC	n.d.	Small			Yes				CESI
BE	SACT/ASTB	n.d.	Small			Yes				ALE
BE	VSOA/SLFP	n.d.	Small	Yes	Yes	Yes	Yes	Yes	Large majority	
BG	СЖБ	15 469	Largest	Yes	Yes	No		Yes	> 90	
BG	СЛПБ	1 200	Small	Yes	Yes	No		Yes	> 36	ALE
BG	ФТР Подкрепа	1 000	Small	Yes	Yes	No	No	Yes	> 30	
CZ	ADP	505	Small	Yes	No	No		Yes	36	
CZ	CS ČR	200	Small	Yes	No	No		Yes	43	
CZ	DUO	121	Small	Yes	No	No		Yes	79	
CZ	FSČR	4 500	Second	Yes	No	No		Yes	79	ALE
CZ	FV	340	Small	Yes	No	No		Yes	79	
CZ	FVČ	580	Small	Yes	No	No		Yes	79	
CZ	FŽ ČR	19	Small	Yes	No	No		Yes	65	
CZ	OOOZS	10	Small	Yes	No	No		Yes	n.d.	
CZ	OSZSO	3	Small	Yes	No	No		Yes	n.d.	
CZ	Pro Libertate	8	Small	Yes	No	No		Yes	n.d.	
CZ	SOSAD	516	Small	Yes	No	No		Yes	79	
CZ	UŽZ	214	Small	Yes	No	No		Yes	79	

Member State	Trade union	Members in the railway sector	Ranking in their Member State by membership size	Considered representative	Involved in social dialogue (bipartite/ tripartite)	Consulted by the government	Involved in collective bargaining at the sector level	Involved in collective bargaining at the company level	Proportion of workforce covered by collective bargaining in which this trade union is involved (%)	Affiliations to other European associations
DE	GDL	40 000	Second	Yes	Yes	Yes	Yes	Yes	4	CESI via ddb trade union
DK	3F	n.d.	n.d.	Yes	Yes		Yes		n.d.	
DK	Djøf	n.d.	Small					Yes	n.d.	
DK	DM	62	Small					Yes	n.d.	
DK	IDA	1 000	Small					Yes	n.d.	
EE	ERAÜ	496	Largest	Yes				Yes	86	
EE	EVAÜ	16	Second	Yes				Yes	0.1	
EL	ΠΕΠΕ	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	ALE
EL	ΣΕΟ	1 041	Second	Yes	Yes	Yes	No	Yes	13	
EL	ΣΕΠ ΤΡΑΙΝΟΣΕ	435	Third	Yes	No	No	No	Yes	30	
ES	Alferro	n.d.	n.d.	n.d.	n.d.	n.d.		Yes	n.d.	
ES	SCF	n.d.						Yes	n.d.	
ES	SEMAF	7 000	Second	Yes		Yes		Yes	n.d.	ALE
ES	SF-Intersindical	2 500		Yes		Yes		Yes	60	
ES	SFF-CGT	4 000		Yes		Yes		Yes	n.d.	
FI	RLEA	n.d.	Small	Yes	Yes	Yes	Yes	No	15	
FI	RTTL	600	Small	Yes	Yes	Yes	Yes	Yes	15	
FR	SUD-Rail	900	Smaller	Yes	Yes	Yes	Yes	Yes	100	
HR	SHŽ	1 700	Third	Yes		Yes	No collective bargaining	Yes	40	
HR	SIHŽ	1 800	Second	Yes		Yes	No collective bargaining	Yes	52	
HR	SPVH	1 600	Fourth	Yes		Yes	No collective bargaining	Yes	52	

Member State	Trade union	Members in the railway sector	Ranking in their Member State by membership size	Considered representative	Involved in social dialogue (bipartite/ tripartite)	Consulted by the government	Involved in collective bargaining at the sector level	Involved in collective bargaining at the company level	Proportion of workforce covered by collective bargaining in which this trade union is involved (%)	Affiliations to other European associations
HU	MOSZ	4 000	Third		Yes	Yes		Yes	20	ALE
IE	Connect	500	Small	Yes		Yes	Yes	Yes	Large proportion	
IE	NBRU	846		Yes				Yes	100	
IE	TSSA	n.d.		Yes				Yes		
IE	Unite	n.d.	Small	Yes				Yes	100	
IT	FAISA CISAL	n.d.	Small	Yes	Yes	Yes	Yes	Yes	100	
IT	FAST-Confsal	n.d.	Small	Yes	Yes	Yes	Yes	Yes	100	ALE
IT	Or.S.A. Ferrovie	n.d.	Small	Yes	Yes	Yes	Yes	Yes	100	
IT	SAVT	n.d.	Small	Yes	Yes	Yes	Yes	Yes	100	
IT	UGL Ferrovieri	n.d.	Small	Yes	Yes	Yes	Yes	Yes	100	
LT	LGPSS	380	Largest	Yes	No	Yes	Yes		96	
NL	HZC	105	Small	Yes	No	No	Yes		5	
NL	VHS	n.d.	Small	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	
NL	VVMC	6 000	Largest	Yes	Yes	Yes	Yes	Yes	50	
PL	FZZ	33 000	Largest	Yes	Yes	Yes			n.d.	
PL	OPZZ	21 289	Third	Yes	Yes	Yes		Yes	n.d.	ALE (indirect via ZZM)
PT	Aprofer	23 (*)	Small	Yes	No	Yes		Yes	30	
PT	ASCEF	23 (*)	Small	Yes	No	Yes		Yes	75	
PT	Assifeco	23 (*)	Small	Yes	No	Yes		Yes	12	
PT	Fentcop	23 (*)	Small	Yes	No	Yes		Yes	75	
PT	SFRCI	23 (*)	Small	Yes	No	Yes		Yes	13	
PT	SIFA	23 (*)	Small	Yes	No	Yes		Yes	75	
PT	Sinafe	n.d.	Third	Yes	No	Yes		Yes	75	

Member State	Trade union	Members in the railway sector	Ranking in their Member State by membership size	Considered representative	Involved in social dialogue (bipartite/ tripartite)	Consulted by the government	Involved in collective bargaining at the sector level	Involved in collective bargaining at the company level	Proportion of workforce covered by collective bargaining in which this trade union is involved (%)	Affiliations to other European associations
PT	Sindefer	23 (*)	Small	Yes	No	Yes		Yes	75	
PT	SINFA	23 (*)	Small	Yes	No	Yes		Yes	75	
PT	SINFB	23 (*)	Small	Yes	No	Yes		Yes	75	
PT	Sintti	23 (*)	Small	Yes	No	Yes		Yes	30	
PT	SIOFA	23 (*)	Small	Yes	No	Yes		Yes	75	
PT	Sitrens	23 (*)	Small	Yes	No	Yes		Yes	5	
PT	SMAQ	1 322	Second	Yes	No	Yes		Yes	15	ALE
PT	SNTSF	2 500	Largest	Yes	No	Yes		Yes	75	
PT	STF	23 (*)	Small	Yes	No	Yes		Yes	37	
PT	STMEFE	23 (*)	Small	Yes	No	Yes		Yes	27	
RO	AFTF	6 998	Third	Yes	Yes	Yes		Yes	13.7	ALE (via FML) ([56])
RO	Elcatel	14 000	Second			Yes		Yes	27.5	
RO	FML	2 875	Small		Yes	Yes		Yes	5.5	ALE
RO	FNFMCV	17 017	Largest	Yes	Yes	Yes		Yes	33.5	
RO	FSAT	3 701	Small			Yes		Yes	7.5	
SE	Ledarna	300	Small	Yes		Yes	Yes	Yes	95	
SE	SRAT TJ	3 267	Second	Yes		Yes	Yes	Yes	100	
SE	Sveriges Ingenjörer	247	Small	Yes		Yes	Yes	Yes	100	
SE	Unionen	950	Small	Yes					n.d.	
SI	SDŽDS	312	Small	Yes	Yes		Yes	Yes	30	
SI	SSŽ	5 942	n.d.					Yes	30	
SI	SVLM	177	Small	Yes	Yes		Yes	Yes	30	

([56]) The Romanian trade union AFTF, listed in here and in Table 53, Section 7.1, as being affiliated to ALE via its membership to the federation FML, is not counted as a separate affiliate, to avoid double counting.

Member State	Trade union	Members in the railway sector	Ranking in their Member State by membership size	Considered representative	Involved in social dialogue (bipartite/ tripartite)	Consulted by the government	Involved in collective bargaining at the sector level	Involved in collective bargaining at the company level	Proportion of workforce covered by collective bargaining in which this trade union is involved (%)	Affiliations to other European associations
SI	SVPS	177	Small	Yes	Yes		Yes	Yes	30	
SI	SVŽVS	322	Small	Yes	Yes		Yes	Yes	30	
SI	SŽPS	1 279	Small	Yes	Yes		Yes	Yes	30	
SI	SŽS	1 217	Small	Yes	Yes		Yes	Yes	30	
SI	SŽTS	746	No	Yes	Yes		Yes	Yes	30	
SK	FS SR	1 834	Second	Yes	Yes			Yes	30	ALE
SK ([57])	FVČ	n.d.	n.d.	Yes	Yes			Yes		
Total		**219 437**		**Yes: 78**	**Yes: 32**	**Yes: 52**	**Yes: 26**	**Yes: 82**	**Average: 53**	**Yes: 12**

(*) In Portugal, 14 smaller trade unions did not provide membership data to the Eurofound correspondents, thus the average number of trade union members in the sector (23) was estimated.

Notes: Blank cells indicate no coverage of the category. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

Table 50 lists the national trade unions not represented on the ESSDC based on the various types of railway workers among their members: those involved in passenger transport, freight transport, railway infrastructure, station operations and intermediation service activities.

The unions not represented on the ESSDC have a broad sector-relatedness across all main activities in the railway sector. Some 77 trade unions have trade union members working in passenger transport, 71 in freight transport, 72 in railway infrastructure, 60 in station operations and 19 in intermediation service activities.

([57]) As explained in Section 1.5, several smaller trade union organisations have appeared since the previous representativeness study for the railway sector in 2017 as a result of market liberalisation. This is the case in Slovakia. However, only three Slovakian trade unions replied to the Eurofound correspondents' requests for information.

Table 49: Sector-relatedness of national trade unions not represented on the railway sector ESSDC, EU-25, 2024

Member State	Trade union	Passenger transport	Freight transport	Operation of railway infrastructure (tracks, signalling, etc.)	Operation of stations/terminals	Intermediation service activities
BE	ABVV BBTK / FGTB SETCa		Yes			
BE	Metisp-Protect	Yes		Yes	Yes	Yes
BE	OVS/SIC	Yes		Yes	Yes	Yes
BE	SACT/ASTB	Yes	Yes			
BE	VSOA/SLFP	Yes		Yes	Yes	Yes
BG	СЖБ	Yes	Yes	Yes	Yes	
BG	СЛПБ	Yes	Yes			
BG	ФТР Подкрепа	Yes	Yes	Yes	Yes	
CZ	ADP	No	No	Yes	Yes	
CZ	CS ČR	Yes	Yes	Yes	Yes	Yes
CZ	DUO	Yes	Yes	Yes		Yes
CZ	FSČR	Yes	Yes	Yes	Yes	
CZ	FV	Yes	Yes	Yes	Yes	
CZ	FVČ	Yes	Yes	Yes	Yes	Yes
CZ	FŽ ČR	Yes	Yes	Yes		Yes
CZ	OSZSO	Yes	No			
CZ	OOOSZ	Yes	No			
CZ	Pro Libertate	Yes	No			
CZ	SOSAD	Yes	Yes	Yes	Yes	Yes
CZ	UŽZ	Yes	Yes	Yes	Yes	Yes
DE	GDL	Yes	Yes	Yes	Yes	
DK	3F	n.d.	n.d.	n.d.	n.d.	n.d.
DK	Djøf	n.d.	n.d.	n.d.	n.d.	n.d.
DK	DM	Yes			Yes	
DK	IDA	Yes	Yes	Yes	Yes	
EE	ERAÜ	Yes	Yes	Yes	Yes	
EE	EVAÜ	Yes	Yes			

Member State	Trade union	Passenger transport	Freight transport	Operation of railway infrastructure (tracks, signalling, etc.)	Operation of stations/terminals	Intermediation service activities
EL	ΠΕΠΕ	n.d.	n.d.	n.d.	n.d.	n.d.
EL	ΣΕΟ			Yes	Yes	
EL	ΣΕΠ ΤΡΑΙΝΟΣΕ	Yes	Yes			
ES	Alferro	Yes	Yes	Yes	Yes	Yes
ES	SCF	Yes	Yes	Yes	Yes	Yes
ES	SEMAF	Yes	Yes	Yes	Yes	
ES	SF-Intersindical	Yes	Yes	Yes	Yes	Yes
ES	SFF-CGT	Yes	Yes	Yes	Yes	Yes
FI	RLEA	Yes	Yes	Yes	Yes	Yes
FI	RTTL	Yes	Yes	Yes		Yes
FR	SUD-Rail	Yes	Yes	Yes	Yes	
HR	SHŽ	Yes	Yes	Yes	Yes	Yes
HR	SIHŽ			Yes		
HR	SPVH			Yes	Yes	
HU	MOSZ	Yes	Yes	Yes	Yes	
IE	Connect			Yes	Yes	
IE	NBRU	Yes	Yes	Yes	Yes	
IE	TSSA	Yes	Yes	Yes	Yes	
IE	Unite	Yes	Yes	Yes	Yes	
IT	FAISA CISAL	Yes	Yes	Yes	Yes	
IT	FAST-Confsal	Yes	Yes	Yes	Yes	
IT	Or.S.A. Ferrovie	Yes	Yes	Yes	Yes	
IT	SAVT	Yes	Yes	Yes	Yes	
IT	UGL Ferrovieri	Yes	Yes	Yes	Yes	
LT	LGPSS	Yes	Yes	Yes	Yes	
NL	HZC			Yes		
NL	VHS	n.d.	n.d.	n.d.	n.d.	n.d.
NL	VVMC	Yes	Yes		Yes	
PL	FZZ	Yes	Yes			

Member State	Trade union	Passenger transport	Freight transport	Operation of railway infrastructure (tracks, signalling, etc.)	Operation of stations/terminals	Intermediation service activities
PL	OPZZ	Yes	Yes	Yes		
PT	Aprofer			Yes		
PT	ASCEF	Yes	Yes	Yes	Yes	
PT	Assifeco	Yes	Yes	Yes	Yes	
PT	Fentcop	Yes	Yes	Yes	Yes	
PT	SFRCI	Yes	Yes	Yes	Yes	
PT	SIFA	Yes	Yes	Yes	Yes	
PT	Sinafe	Yes	Yes	Yes	Yes	
PT	Sindefer	Yes	Yes	Yes	Yes	
PT	SINFA	Yes	Yes	Yes	Yes	
PT	SINFB	Yes	Yes	Yes	Yes	
PT	Sintti	Yes	Yes	Yes	Yes	
PT	SIOFA	Yes	Yes	Yes	Yes	
PT	Sitrens	Yes	Yes			
PT	SMAQ	Yes	Yes			
PT	SNTSF	Yes	Yes	Yes	Yes	
PT	STF	Yes	Yes	Yes	Yes	
PT	STMEFE	Yes	Yes			
RO	AFTF	Yes	Yes	Yes	Yes	
RO	Elcatel			Yes	Yes	
RO	FML	Yes	Yes	Yes	Yes	
RO	FNFMCV	Yes	Yes	Yes	Yes	
RO	FSAT	Yes	Yes	Yes	Yes	
SE	Ledarna			Yes	Yes	Yes
SE	SRAT TJ	Yes	Yes	Yes		
SE	Sveriges Ingenjörer			Yes	Yes	
SE	Unionen					Yes
SI	SDŽDS	Yes	Yes	Yes		
SI	SSŽ	Yes	Yes	Yes		
SI	SVLM	Yes	Yes	Yes		

Member State	Trade union	Passenger transport	Freight transport	Operation of railway infrastructure (tracks, signalling, etc.)	Operation of stations/terminals	Intermediation service activities
SI	SVPS	Yes	Yes	Yes		
SI	SVŽVS	Yes	Yes	Yes		
SI	SŽPS	Yes	Yes	Yes		
SI	SŽS	Yes	Yes	Yes		
SI	SŽTS	Yes	Yes		Yes	
SK	FS SR	Yes	Yes	Yes	Yes	Yes
SK	FVČ	Yes	Yes			
Total	**93**	**77**	**71**	**72**	**60**	**19**

Notes: Blank cells indicate no coverage of the category. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

6.2. National sectoral employer organisations and business associations not represented on the ESSDC

A total of 29 employer organisations are not members of either CER or EIM and are thus not represented on the ESSDC for the railway sector (see Table 51Table 50). This represents 83 % of all 35 sectoral employer organisations in all 17 Member States in which national sectoral employer organisations exist (no employer organisations exist in Bulgaria, Croatia, Estonia, Greece, Ireland, Latvia, Luxembourg and the Netherlands).

Table 51 provides a comprehensive overview of the membership strength, sectoral coverage and representativeness of the employer organisations not represented on the ESSDC for the railway sector across the EU-25. The 29 organisations not represented on the ESSDC collectively represent around 590 companies, or 49 % of all 1 202 companies in the railway sector in the EU-25. They employ approximately 268 000 workers, which equates to about 30 % of the entire European railway sector's workforce.

For 10 employer organisations, membership data were not available, so further analysis should be treated with caution. Where membership data are available, the largest, or only, sectoral employer organisations currently not represented on the ESSDC are in Czechia, Denmark, Finland, France, Hungary, Italy, Lithuania, Poland, Portugal, Romania, Slovakia and Slovenia.

Notably, the majority of these employer organisations (22, or 76 %) are qualified to be representative at the national level according to national law/practice, more than a third are actively engaged in social dialogue and 19 are consulted by their national governments on sector-related matters. However, there is significant variation in their size and influence, ranging from single-employer-organisation representation in some countries, like Portugal, to large organisations in France and Poland covering tens of thousands of workers.

The table also highlights the diverse involvement of these employer organisations in collective bargaining and European-level associations. Twelve organisations are involved in collective bargaining at the sector level, and six are involved in company-level collective bargaining (with 13 being involved in some type of collective bargaining, or 45 % of all 29 unrepresented employer organisations, in 10 Member States). Their collective bargaining coverage ranges from 1 % to 100 % of the sectoral companies in their Member State (the latter is the case in France). Thus, many of these employer organisations play a significant role in shaping labour relations and sectoral policies, both nationally and across Europe. Nevertheless, the absence of membership data for some organisations suggests caution is warranted in interpreting the overall representativeness and possible influence of these organisations.

Eleven employer organisations not on the ESSDC are members of other European-level organisations, such as the European Rail Freight Association (ERFA), UITP, FIEC and UNIFE. Most frequently, ERFA membership is reported. A more detailed analysis of this organisation is available in Section 7.2.

Table 50: Membership strength of national employer organisations not represented on the railway ESSDC, EU-25, 2024

Member State	Employer organisation	Number of member companies	Workforce employed by member companies	Ranking in the sector by member-ship size	Considered representative	Involved in social dialogue (bipartite/ tripartite)	Consulted by the govern-ment	Involved in collective bargaining at the sector level	Involved in collective bargaining at the company level	Proportion of workforce covered by collective bargaining in which this EO is involved	Affiliated to other European association
BE	WF-FE	7	1 000	Second	Yes	Yes	Yes	Yes	Yes	Small	
CZ	SD ČR	7	38 000	Largest	Yes		Yes				
CZ	Žesnad	26	10 000	Second	Yes		Yes				ERFA
DE	AGVDE	100			Yes			Yes	Yes		
DE	Die Güterbahnen	110	n.d.	Small	n.d.	n.d.	Yes	n.d.	n.d.	n.d.	ERFA
DK	AKT	23	2 000	Second							
DK	JA	13		Largest	Yes			Yes			
ES	Agesfer	n.d.	n.d.		Yes			Yes			
ES	Unecofe	n.d.	n.d.		Yes			Yes			
FI	Palta	4	4 650	1 EO	Yes	Yes	Yes	Yes	Yes	94 %	
FR	Samera	4	100 %	Second	Yes	Yes		Yes		100 %	
FR	UTPF	29	100 %	Largest	Yes	Yes	Yes	Yes		100 %	
HU	MVVLSZ	5	60 000	1 EO	Yes	Yes	Yes				
IT	AGENS	n.d.	n.d.	Largest	Yes	Yes	Yes	Yes	Yes	100 %	
IT	Assoferr	n.d.	n.d.	Small	Yes						
IT	Asstra	n.d.	n.d.	Second	Yes			Yes	Yes	n.d.	UITP
IT	Fercargo	15		Small	Yes						ERFA
LT	LGĮA	7	4 649	Largest	Yes		Yes	Yes		96 %	
PL	IGTL	70					Yes				ERFA
PL	Pracodawcy RP	18	13 569		Yes	Yes	Yes				SGI Europe

Member State	Employer organisation	Number of member companies	Workforce employed by member companies	Ranking in the sector by member-ship size	Considered representative	Involved in social dialogue (bipartite/ tripartite)	Consulted by the govern-ment	Involved in collective bargaining at the sector level	Involved in collective bargaining at the company level	Proportion of workforce covered by collective bargaining in which this EO is involved	Affiliated to other European association
PL	ZNPK	14	1 550				Yes				ERFA
PL	ZPK	33	90 000	Largest			Yes		Yes	n.d.	
PT	APEF	2	857	1 EO	Yes						ERFA
RO	AIF	30	11 300	Largest		Yes	Yes				UNIFE
RO	OPSFPR	11	5 500	Second		Yes	Yes				
SE	Byggföretagen	24	1 800	Second	Yes		Yes	Yes		40 %	FIEC
SI	GZS	5	30 %	Largest	Yes		Yes				
SK	AROS	15	5 330	Largest	Yes	Yes	Yes				UIRR
SK	ÚDPT	18	18 000	Second	Yes	Yes	Yes				
Total		**590**	**268 205**	**Largest: 9 Second: 8**	**22**	**11**	**19**	**12**	**6**	**88 %**	**11**

Notes: Blank cells indicate no coverage of the category. EO, employer organisation; n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

Table 52 provides a comprehensive overview of the national employer organisations not represented on the railway ESSDC across the EU-25 in 2024, detailing their members' involvement in various segments of the railway sector. Notably, there are 17 employer organisations active in passenger transport, 22 in freight transport, 16 in the operation of railway infrastructure and 16 in the operation of stations/terminals and 15 in intermediation service activities. This distribution reveals that freight transport is the segment where most unrepresented employer organisations are active, followed by passenger transport, indicating a significant emphasis on cargo and goods movement within the sector. Some organisations, such as those in Czechia, Finland, France, Italy, Poland and Slovakia, demonstrate broad engagement, covering all or nearly all railway sector segments, illustrating the presence of large, multifaceted entities within these national markets.

In contrast, several employer organisations have a narrower focus, with their involvement limited to a single segment of the railway sector, most commonly freight transport or infrastructure operation. For example, employer organisations like Žesnad (Czechia), Fercargo (Italy), APEF (Portugal) and OPSFPR (Romania) participate primarily in freight services. The pattern of sectoral coverage underscores the diversity and specialisation present among European employer organisations operating outside the formal ESSDC framework for the railway sector.

Table 51: Sector-relatedness of national employer organisations not represented on the railway ESSDC, EU-25, 2024

Member State	Employer organisation	Parts of the railway sector where their companies are active				
		Passenger transport	Freight transport	Operation of railway infrastructure (e.g. tracks, signalling)	Operation of stations/terminals	Intermediation service activities
BE	WF-FE		Yes			
CZ	SD ČR	Yes	Yes	Yes	Yes	Yes
CZ	Žesnad		Yes			
DE	AGVDE	Yes	Yes			
DE	Die Güterbahnen		Yes			
DK	AKT	Yes		Yes		
DK	JA	Yes	Yes	Yes	Yes	Yes
ES	Agesfer				Yes	Yes
ES	Unecofe				Yes	Yes
FI	Palta	Yes	Yes	Yes	Yes	Yes
FR	Samera			Yes	Yes	Yes
FR	UTPF	Yes	Yes	Yes	Yes	Yes
HU	MVVLSZ	Yes	Yes	Yes	Yes	Yes
IT	AGENS	Yes	Yes	Yes	Yes	Yes
IT	Assoferr	Yes	Yes			
IT	Asstra	Yes	Yes	Yes	Yes	
IT	Fercargo		Yes			
LT	LGĮA	Yes	Yes	Yes	Yes	
PL	IGTL	Yes	Yes	Yes	Yes	Yes
PL	Pracodawcy RP	Yes	Yes	Yes	Yes	Yes
PL	ZNPK	Yes			Yes	Yes
PL	ZPK	Yes	Yes		Yes	Yes
PT	APEF		Yes			
RO	AIF			Yes		
RO	OPSFPR		Yes			
SE	Byggföretagen			Yes		Yes
SI	GZS	Yes	Yes	Yes		
SK	AROS		Yes			
SK	ÚDPT	Yes	Yes	Yes	Yes	Yes
Total	**29**	**17**	**22**	**16**	**16**	**15**

Notes: Blank cells indicate no coverage of the category. n.d., no data provided by the organisation to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

7. Other European organisations

In this section, analysis is undertaken for other European organisations currently not represented on the ESSDC (i.e. not ETF, CER or EIM) that have affiliates among the railway sector trade unions and employer organisations operating at the national level. This is the case for ALE and ERFA.

7.1. Other European trade union organisations (including ALE)

The study identified a total of 18 trade unions that are members of European organisations other than ETF (or 11 % of all 137 sectoral trade unions in the EU-25) in 15 Member States (Belgium, Bulgaria, Croatia, Czechia, Denmark, Finland, Germany, Greece, Hungary, Italy, Poland, Portugal, Romania, Slovakia and Spain; see Table 53Table 52). Out of these 18 organisations, five trade unions are also members of ETF's railway section and thus represented on the ESSDC.

The total number of members represented by these 18 organisations amounts to around 93 543 railway workers (or 10 % of all the sectoral workforce in the EU-25). Only the second largest trade union in Czechia, is represented by a European trade union organisation other than ETF.

ALE represents 12 national sectoral trade unions, while two unions reported membership to CESI, and one trade union each reported membership to EPSU, industriAll Europe, NTF and USIC.

Table 52: Trade unions affiliated to other railway sector trade union associations, EU-25, 2024

Member State	Trade union	Number of members in the railway sector	Ranking in the sector by membership size	Affiliated to ETF	Affiliated to other European associations	European affiliations
BE	OVS/SIC	n.d.	Small		Yes	CESI
BE	SACT/ASTB	n.d.	Small		Yes	ALE
BG	СЛПБ	1 200	Small		Yes	ALE
CZ	FSČR	4 500	Second		Yes	ALE
DE	GDL	40 000	Second		Yes	CESI via ddb trade union
DK	DMF	2 000	Second	Yes	Yes	ETF, industriAll Europe
EL	ΠΕΠΕ	n.d.	n.d.		Yes	ALE
ES	SEMAF	7 000	Second		Yes	ALE
FI	JHL	3 400	Largest	Yes	Yes	ETF, EPSU
FI	RAU	1 500	Second	Yes	Yes	ETF, NTF
HR	SSH	1 500	Fifth	Yes	Yes	ETF, ALE
HU	MOSZ	4 000	Third		Yes	ALE
IT	FAST-Confsal	n.d.	Small		Yes	ALE
PL	OPZZ	21 289	Third		Yes	ALE via ZZM
PT	SMAQ	1 322	Second		Yes	ALE
RO	FML	2 875	Small		Yes	ALE
SK	FS SR	1 834	Second		Yes	ALE
SK	OZŽ	1 123	Largest	Yes	Yes	ETF, USIC

Notes: Blank cells indicate no coverage of the category. n.d., no data provided by the trade union to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

ALE membership is analysed in more detail below. ALE has 12 affiliated trade unions in 12 Member States ([58]), or 9 % of all 137 sectoral trade unions (see Table 54).

Taken together, the 12 ALE members organise 45 520 railway sector workers, specifically train drivers. This constitutes 5 % of the entire European sectoral workforce and 37 % of train drivers employed in the EU-25 (see Section 1.2). While overall the ALE affiliates tend to be smaller unions, the second largest sectoral trade unions in Czechia, Denmark, Finland, Germany, Portugal, Slovakia and Spain are affiliated to ALE.

Out of the 12 ALE members, eight are considered to be representative according to national law/practice. Two affiliates are involved in the collective bargaining processes at the sector level, and nine at the company level. Their collective bargaining coverage ranges from 5 % to 100 % of the sectoral workforce (the latter is the case in Italy), with an average coverage rate of 38 %. Five affiliates are involved in social dialogue bodies (bipartite/tripartite), and eight affiliates are consulted by the government on sector-related matters. Four ALE affiliates belong to national trade union confederations.

Table 53: Membership strength, role in the industrial relations landscape of ALE affiliates, Europe, 2024

Member State	ALE affiliate	Number of members in the railway sector	Ranking in the sector by membership size	Considered representative	Involved in social dialogue	Consulted by the government	Involved in collective bargaining at the sector level for the railway sector	Involved in collective bargaining at the company level in the railway sector	Proportion of the national railway sector workforce covered by the collective bargaining in which the trade union is involved (%)	Affiliated to a cross-industry national trade union confederation
BE	SACT/ ASTB	n.d.	Small			Yes			n.d.	
BG	СЛПБ	1 200	Small	Yes				Yes	> 36	Yes
CZ	FSČR	4 500	Second	Yes			Yes		79	
EL	ΠΕΠΕ	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
ES	SEMAF	7 000	Second	Yes		Yes		Yes	n.d.	
HR	*SSH*	*1 500*	*Fifth*	*Yes*		*Yes*	*No*	*Yes*	*18*	
HU	MOSZ	4 000	Third		Yes	Yes		Yes	20	
IT	FAST-Confsal	n.d.	Small	Yes	Yes	Yes	Yes	Yes	100	Yes
PL	OPZZ	21 289	Third	Yes	Yes	Yes		Yes	n.d.	Yes
PT	SMAQ	1 322	Second	Yes		Yes		Yes	15	
RO	FML	2 875	Small		Yes	Yes		Yes	5.5	Yes
SK	FS SR	1 834	Second	Yes	Yes	n.d.		Yes	30	
Total	**12**	**45 520**		**8**	**5**	**8**	**2**	**9**	**38 average**	**4**

Notes: Blank cells indicate no coverage of the category; italic font indicates unions that are also ETF members. n.d., no data provided by the trade union to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

([58]) The Romanian trade union AFTF, listed in Table 49 as being affiliated to ALE via its membership to the federation FML, is not counted as a separate affiliate, to avoid double counting.

Table 55 categorises ALE affiliates based on the various types of railway workers among their members, such as those involved in passenger transport, freight transport, railway infrastructure, station operations and intermediation activities.

In total, 11 ALE affiliates have trade union members working in passenger transport, 11 in freight transport, eight in railway infrastructure, seven in station operations and three in intermediation activities. Ten ALE affiliates include members who are employees, two include self-employed workers, four include management staff and 11 include train drivers. One ALE affiliate organises workers in companies employing 1–9 employees, three affiliates organise workers in companies employing 10–49 employees, four affiliates organise workers in companies employing 50–249 employees and 11 affiliates organise workers in companies employing 250+ workers.

Table 54: Sector-relatedness of ALE affiliates, EU-25, 2024

Member State	ALE affiliate	Parts of the railway sector in which this trade union has members					Types of workers organised				Sizes of companies organised			
		Passenger transport	Freight transport	Operational of railway infrastructure (e.g. tracks, signalling)	Operation of stations/terminals	Intermediation railway services	Employees	Self- employed	Managerial staff	Train drivers	1–9 employees	10–49 employees	50–249 employees	250+ employees
BE	SACT/ASTB	Yes	Yes				Yes			Yes				Yes
BG	СЛПБ	Yes	Yes				Yes		Yes	Yes				Yes
CZ	FSČR	Yes	Yes	Yes	Yes	Yes	Yes			Yes				Yes
EL	ΠΕΠΕ	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d..	n.d.	n.d.	n.d.	n.d.
ES	SEMAF	Yes	Yes	Yes	Yes					Yes		Yes	Yes	Yes
HR	*SSH*	*Yes*	*Yes*	*Yes*	*Yes*	*Yes*	*Yes*		*Yes*	*Yes*				*Yes*
HU	MOSZ	Yes	Yes	Yes	Yes		Yes			Yes		Yes	Yes	Yes
IT	FAST-Confsal	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
PL	OPZZ	Yes	Yes	Yes			Yes			Yes				Yes
PT	SMAQ	Yes	Yes				Yes	Yes	Yes	Yes			Yes	Yes
RO	FML	Yes	Yes	Yes	Yes		Yes			Yes				Yes
SK	FS SR	Yes	Yes	Yes	Yes	Yes	Yes			Yes				Yes
Total		**11**	**11**	**8**	**7**	**3**	**10**	**2**	**4**	**11**	**1**	**3**	**4**	**11**

Notes: Blank cells indicate no coverage of the category; italic font used for unions that are also ETF members. n.d., no data provided by the trade union to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

7.2. Other European employer organisations and business associations (including ERFA)

This section provides a detailed overview of the affiliations of various national railway sector employer organisations to several other European associations.

In total, 13 employer organisations (out of a total of 35 national sectoral employer organisations) in nine Member States have affiliations to European organisations other than CER and EIM (see Table

56). Two of these employer organisations are also members of CER, so they are represented on the ESSDC.

Overall, the 13 employer organisations have around 700 member companies (with membership data not available for one employer organisation). Especially large memberships are reported by VDV in Germany (which is a business association) and by FVSCH in Austria; both are also CER members. In four Member States (Austria, Portugal, Romania and Slovakia), these employer organisations are the largest employer organisations in the sector, while in four other Member States (Czechia, Germany, Italy and Sweden) they are the second largest employer organisations in the sector.

Regarding European affiliations, membership to ERFA is the one most frequently reported. Overall, six sectoral employer organisations are affiliated to ERFA, while three employer organisations are affiliated to UITP (which organises in the separate sector of urban public transport, covered by a separate ESSDC). One national sectoral employer organisation each is a member of SGI Europe (which is the cross-sectoral employer association representing employers delivering services of general interest), FIEC (which organises the separate sector of construction, covered by a separate ESSDC), UIRR and UNIFE.

Table 55: Other European organisations with affiliated railway sector national employer organisations, EU-25, 2024

Member State	EO	Companies in the railway sector affiliated to this EO	Ranking in the sector by membership size	Affiliated to CER or EIM	Affiliated to any other European association for its members in the railway sector	
AT	FVSCH	108	1 EO	CER	Yes	UITP
CZ	Žesnad	26	Second		Yes	ERFA
DE	Die Güterbahnen	110	Small		Yes	ERFA
DE	VDV ([59])	270	Second	CER	Yes	UITP
IT	Asstra	n.d.	Second		Yes	UITP
IT	Fercargo	15	Small		Yes	ERFA
PL	IGTL	70	n.d.		Yes	ERFA
PL	Pracodawcy RP	18	n.d.		Yes	SGI Europe
PL	ZNPK	14	n.d.		Yes	ERFA
PT	APEF	2	1 EO		Yes	ERFA
RO	AIF	30	Largest		Yes	UNIFE
SE	Byggföretagen	24	Second		Yes	FIEC
SK	AROS	15	Largest		Yes	UIRR
Total	**13**	**702**	**Largest: 2 Second: 4**	**2**	**13**	

Notes: Blank cells indicate no coverage of the category. EO, employer organisation; n.d., no data provided by the trade union to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

The members of ERFA are analysed further below. ERFA affiliates include six employer organisations in five Member States, 13 national companies in 13 Member States and four transnational companies operating across several Member States (see Tables 57–60). Of the six employer

([59]) VDV is a business association, not an employer organisation.

organisations that ERFA represents, one – APEF in Portugal – is the only employer organisation in the country and Žesnad in Czechia is the second largest employer organisation in the country.

Table 56: ERFA-affiliated employer organisations, EU-25, 2024

Member State	Employer organisation
CZ	Žesnad
DE	Die Güterbahnen
IT	Fercargo
PL	IGTL
PL	ZNPK
PT	APEF

Source: Network of Eurofound Correspondents.

Table 57: ERFA-affiliated national railway companies, EU-25, 2024

Member State	Company
AT	LTE
AT	Ost–West Logistik
DE	VTG Rail Europe GmbH
DE	Duisport Rail
ES	Continental Rail
FR	Europorte
FR	Touax Rail
IT	Fercargo
IT	Ambrogio Intermodal
IT	CapTrain Italia
LT	Gargzdu Gelezinkelis Rail – GG Rail
LT	Transachema
PT	Medway

Source: Network of Eurofound Correspondents.

Table 58: ERFA-affiliated transnational railway companies, 2024

Country	Organisation/ company name	Website	Short description	Member States where operational
CH	AKIEM	https://www.akiem.com/	Swiss multinational company providing locomotives and passenger trains. It is headquartered in Switzerland, but operates across Europe under the name Akiem Technik, offering operational maintenance, general overhauls and the sale and management of spare parts and major components.	DE, FR, HU, PL, SE
CH	Bertschi	https://www.bertschi.com/	Swiss logistics company specialised in the intermodal transportation of chemicals by rail, road and water in Europe.	AT, BE, BG, DE, EE, ES, FI, FR, HU, IE, IT, LT, LU, NL, PL, PT, RO, SE, SI, SK
CH	Cargo Rail Europe	www.cargoraileurope.com	Company representing companies in the shipping and logistic sectors that transport goods by rail, truck, ship, pipeline and all variations of combined transport. Its members are the	AT, DE, FR, IT, PL

			customers of the transporters (rail transport companies, forwarding companies, road hauliers, etc.).	
CH	Hupac	www.hupac.ch	Leading intermodal transport operator. The group comprises 10 companies based in Belgium, Germany, Italy, the Netherlands and Switzerland. The company is owned by around 100 shareholders.	BE, DE, IT, NL

Source: Authors' research.

Looking at the different parts of the railway sector, only one ERFA affiliate (the Polish employer organisation IGTL) has members in passenger transport, 15 have members in freight transport, four in the operation of railway infrastructure, two in the operation of stations/terminals and two in intermediation service activities for railway services (see Table 60). This shows that ERFA affiliates predominantly operate in rail freight services in the railway sector.

The six ERFA-affiliated employer organisations together organise around 240 companies. Taken together with the 13 national companies directly affiliated to ERFA, this amounts to around 250 companies. This represents around 22 % of all 1 117 sectoral companies in the EU-25 affiliated to sectoral employer organisations, and around 21 % of all 1 202 sectoral companies in the EU-25. Data on the workforce of ERFA affiliates were not provided to the Eurofound correspondents collecting the data; hence, analysis of this aspect has not been undertaken.

Table 59: Sector-relatedness of ERFA members (employer organisations and companies), EU-25, 2024

Member State	ERFA-affiliated employer organisations	Number of companies	Parts of the railway sector in which the organisation has members/employees				
			Passenger transport	Freight transport	Operation of railway infrastructure (e.g. tracks, signalling)	Operation of stations/ terminals	Intermediation service activities
CZ	Žesnad	26		Yes			
DE	Die Güterbahnen	110		Yes			
IT	Fercargo	15		Yes			
PL	IGTL	70	Yes	Yes	Yes	Yes	Yes
PL	ZNPK	14		Yes		Yes	Yes
PT	APEF	2		Yes			
Member State	**ERFA-affiliated companies** ([60])	**Proportion of the workforce**					
AT	LTE	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
AT	Ost–West Logistik	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
AT	Bertschi	n.d.		Yes			
IT	Ambrogio Intermodal	n.d.		Yes			
IT	CapTrain Italia	n.d.		Yes			
ES	Continental Rail	0.05 %		Yes			
ES	Bertschi Ibérica SL	0.01 %		Yes			
FR	Europorte	1 %		Yes	Yes		
LT	GG Rail	67 (*)		Yes	Yes		
LT	Transachema	93 (*)		Yes	Yes		
PT	Medway	10 %		Yes			
Total			**1**	**15**	**4**	**2**	**2**

(*) Number of workers in the company.

Notes: Blank cells indicate no coverage of the category. n.d., no data provided by the trade union to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

([60]) No data were available for two company affiliates.

Four ERFA-affiliated employer organisations are considered to be representative at the national level (see Table 61). Six affiliates are consulted by the government on sector-related matters. One ERFA company affiliate – Medway, in Portugal – is involved in collective bargaining at the sector and company levels, reporting that its collective bargaining covers 7 % of the national sector workforce.

Table 60: Position of ERFA affiliates (employer organisations and companies) in the industrial relations landscape, EU-25, 2024

Member State	ERFA affiliate	Considered representative	Involved in sectoral social dialogue (bipartite/tripartite)	Consulted by the government	Involved in collective bargaining at the sector level	Involved in collective bargaining at the company level	Proportion of national workforce covered by collective bargaining involving this member
CZ	Žesnad	Yes		Yes			
DE	Die Güterbahnen	Yes		Yes			
IT	Fercargo	Yes					
PL	IGTL			Yes			
PL	ZNPK			Yes			
PT	APEF	Yes					
ERFA member companies							
AT	Bertschi	Not applicable					
AT	LTE						
AT	Ost–West Logistik						
ES	Bertschi Ibérica SL		n.d.	n.d.	n.d.	n.d.	n.d.
ES	Continental Rail		n.d.	n.d.	n.d.	n.d.	n.d.
IT	Ambrogio Intermodal						
IT	CapTrain Italia						
LT	GG Rail			Yes			
LT	Transachema			Yes			
PT	Medway				Yes	Yes	7.0 %
Total		**4**	**0**	**6**	**1**	**1**	

Notes: Blank cells indicate no coverage of the category. n.d., no data provided by the trade union to Eurofound correspondents.

Source: Network of Eurofound Correspondents.

8. Conclusion

There are around 900 000 workers in the railway sector in the EU-25 (there is no railway sector in Cyprus and Malta) and approximately 1 200 companies. The workers are organised by 137 trade unions in 25 Member States, and the employers by 35 employer organisations in 17 Member States. Eight Member States have no employer organisations (Bulgaria, Croatia, Estonia, Greece, Ireland, Latvia, Luxembourg and the Netherlands).

ETF has 44 affiliated sectoral trade unions in 22 Member States (there are no ETF affiliates in Estonia, Portugal or Romania). In terms of sector-relatedness, ETF organises and represents all types of workers in the sector in all types of railway activities. In terms of its membership strength, ETF organises 32 % of all national sectoral trade unions and 76 % of all individual trade union members, which corresponds to 54 % of the entire sectoral workforce (an estimated 900 000 workers) and around 41 % solely for the train drivers employed in the EU-25.

In each of the Member States ETF has affiliates in, except Greece, ETF has an affiliated trade union involved in collective bargaining. In total, 95 % of ETF-affiliated trade unions are involved in collective bargaining, and 91 % are recognised as representative. ETF has a fully formalised mandating procedure and statute-based negotiation capacity. Additionally, the agreement on working conditions for mobile workers assigned to cross-border interoperable services, later implemented as Council Directive 2005/47/EC, complements this statutory mandate. Through their ETF members, 13 Member States participated in the work of the ESSDC for railways in 2023, 2024 and 2025. ETF affiliates from nine Member States did not participate in any of the railway sector ESSDC's meetings during 2023–2025.

In terms of future capacity building, the study identified a total of 93 trade unions that are not members of ETF's railway section and are thus not represented on the ESSDC for the railway sector (68 % of all 137 sectoral trade unions) in 22 Member States (see Table 49). Among these 22 Member States are the three in which ETF has no affiliates for the railway sector: Estonia, Portugal and Romania. The 93 trade unions together represent around 220 000 members, which constitutes 24 % of the entire European sectoral workforce.

The current study identified one other relevant European trade union organisation in the railway sector: ALE, which represents 12 sectoral trade unions from 12 Member States, including Portugal and Romania, two countries in which ETF does not have any members for the railway sector. Eleven of the ALE-affiliated unions organise workers in passenger rail transport (NACE Rev. 2.1 code 49.1) and freight rail transport (NACE Rev. 2.1 code 49.2), while eight trade unions organise workers involved in railway infrastructure and station operation (NACE Rev. 2.1 code 52.21), and finally three ALE-affiliated unions represent workers involved in intermediation service activities (NACE Rev. 2.1 code 52.3). Only one of the ALE-affiliated trade unions – SSH in Croatia – is also affiliated to ETF for the railway sector. ALE members represent around 45 000 railway sector workers, 5 % of the entire European sectoral workforce and around 37 % of train drivers employed in the EU-25. Out of the 12 ALE members, eight are qualified to be representative at the national level. Two affiliates are involved in the collective bargaining processes at the sector level, and nine at the company level.

Based on the findings documented in this study, it can be concluded that ETF is the most representative European trade union organisation in the railway sector.

CER represents railway sector employer organisations and companies. Five out of 35 sector-related employer organisations (14 % of all sectoral employer organisations) are affiliated to CER in four Member States. In addition, 42 companies are also affiliated to CER in 25 Member States. Thus, CER has at least one member (employer organisation or company) in all 25 Member States. CER affiliates cover around 570 companies, both large incumbents and newer companies, which corresponds to 51 % of all sectoral companies affiliated to an employer organisation and 47 % of all 1 202 railway companies in the EU-25. Companies with CER membership employ around 88 % of the entire European sectoral workforce. In terms of sector-relatedness, CER affiliates have member companies in all the parts of the railway sector.

88 % of CER-affiliated employer organisations and companies participate in collective bargaining in 25 countries, and 80 % of CER's employer organisation members are considered representative at the national level.

CER has a statutory negotiation capacity. Additionally, the agreement on working conditions for mobile workers assigned to cross-border interoperable services, later implemented as Council Directive 2005/47/EC, complements this statutory mandate. Delegates from 12 Member States were represented during the ESSDC meetings, out of the 25 Member States in which railways exist. CER affiliates from 13 Member States did not participate in any of the ESSDC's meetings during 2023–2025.

EIM represents both employer organisations and individual railway companies. Two out of 35 sector-related employer organisations (6 %) are affiliated to EIM, with one of these two (the Belgian HR Rail) also being a CER affiliate. In addition, there are 12 EIM-affiliated companies, three of which are also CER members (the French SNCF Réseau, the Irish IÉ and the Polish PKP PLP). Thus, EIM has at least one member (employer organisation or company) in 10 Member States. In terms of sector-relatedness, EIM affiliates have member companies in all parts of the railway sector. In terms of membership strength, EIM represents 14 companies, which corresponds to 1.3 % of all companies affiliated to an employer organisation and around 1 % of all railway companies, employing around 17 % of the entire European sectoral workforce. Together, 10 EIM-affiliated employer organisations and companies in 7 countries are involved in collective bargaining, and one out of two employer organisations is considered representative.

EIM demonstrated a solely intrinsic capacity to negotiate agreements, as illustrated by the joint positions co-signed by the ESSDC for the railway sector between 2006 and 2012, but no clear statutory mandate. No Member States were represented by EIM during the ESSDC meetings in 2023, 2024 or 2025. The only recorded participation on behalf of EIM is that of a representative of the organisation's secretariat in March 2024. This leads to the conclusion that the adequacy of EIM's structures to ensure its members' effective participation is limited.

In terms of future capacity building, the study identified a total of 29 employer organisations (listed in Table 51 in Section 6.2) that are not members of CER or EIM and are thus not represented on the ESSDC for the railway sector (83 % of all 35 sectoral employer organisations), in 17 Member States with existing national sectoral employer organisations.

Another European employer organisation – ERFA – has some representativeness in the sector. ERFA has six affiliated employer organisations in five Member States, as well as company affiliates in the form of 13 national companies in 13 Member States and four transnational companies operating across several Member States. In terms of sector-relatedness, ERFA has affiliated employer

organisations and companies in different parts of the railway sector (see Table 60); however, freight transport (NACE Rev. 2.1 code 49.2) predominates, with 15 affiliates operating in this segment, followed by the operation of railway infrastructure and stations and terminals (NACE Rev. 2.1 code 52.21) in which four affiliates operate, and two affiliates each in passenger transport (NACE Rev. 2.1 code 49.1) and intermediation service activities (NACE Rev. 2.1 code 52.3). ERFA covers around 250 companies, which is around 22 % of all 1 117 sectoral companies in the EU-25 affiliated to sectoral employer organisations, and around 21 % of all sectoral companies in the EU-25. Four ERFA member employer organisations are considered representative at the national level. Six affiliates are consulted by the government on sector-related matters. One ERFA company affiliate is involved in collective bargaining, which it engages in at both the sector and company levels.

Based on the findings documented in this study, CER is the most representative European employer organisation for the railway sector, while EIM, bearing in mind its limited capacity to ensure its members' effective participation, adds to CER's representativeness with its four members from Belgium, France, Ireland and Poland, which are also CER affiliates. EIM has an additional 10 members in nine Member States that are not affiliated to CER. These findings are summarised in Table 62.

Table 61: Comparative overview of the social partners in the railway sector based on Commission Decision 98/500/EC criteria

Criteria	ETF	CER	EIM	Trade unions not on the railway ESSDC	Employer organisations not on the railway ESSDC
Sector-relatedness	44 out of 137 sectoral trade unions, representing 54 % of the sectoral workforce	5 out of 35 employer organisations plus 42 companies, representing around 47 % of the sectoral companies, employing 87 % of the sectoral workforce	2 out of 35 employer organisations plus 12 companies representing around 1.2 % of the sectoral companies, employing 17 % of the sectoral workforce	93 out of 137 sectoral trade unions	29 out of 35 sectoral employer organisations
Part of the national industrial relations system	95 % of members are involved in collective bargaining in 21 Member States, and 91 % are recognised as representative	88 % of CER EO and company members are involved in collective bargaining in 25 countries, and 80 % of EO members are recognised as representative	50 % EIM EO and company affiliates in 7 countries are involved in collective bargaining, and 50 % of EOs are considered representative	92 % of unrepresented trade unions are involved in collective bargaining in 22 Member States, and 85 % are recognised as representative	45 % of unrepresented EOs are involved in collective bargaining in 10 Member States, and 76 % are recognised as representative
Coverage of Member States	22	25	10	22	17
Capacity to negotiate	Statutory mandating procedures and intrinsic capacity	Statutory mandating procedures and intrinsic capacity	Intrinsic capacity	n/a	n/a
Adequate structures	13 Member States have been represented on the railway ESSDC, out of 22 Member States with ETF affiliates	12 Member States have been represented on the railway ESSDC, out of 25 Member States with CER affiliates	0 Member States have been represented on the railway ESSDC, out of 10 Member States with EIM affiliates.	n/a	n/a

Notes: EO, employer organisation; n/a, not applicable.

References

All Eurofound publications are available at www.eurofound.europa.eu.

Bundesnetzagentur and Bundeskartellamt (Federal Network Agency) (2026), *2025 monitoring report*, Bonn.

CER (2016), *Constitution*, Brussels.

CER and ETF (2019), *Rail mobile workers*, ETF, Brussels.

CER and ETF (2021), *European social partner agreement on women in rail*, ETF, Brussels.

CER and ETF (2022), *Employability in the rail sector in light of digitalisation and automation (EDA rail)*, EVA, Berlin.

Commission Decision 98/500/EC of 20 May 1998 on the establishment of sectoral social dialogue committees promoting the dialogue between the social partners at European level (notified under document number C(1998) 2334) (OJ L 225, 12.8.1998, p. 27, ELI: http://data.europa.eu/eli/dec/1998/500/oj).

Directorate-General for Employment, Social Affairs and Inclusion (undated), 'Railways – Sectoral social dialogue', European Commission website, https://employment-social-affairs.ec.europa.eu/policies-and-activities/eu-employment-policies/social-dialogue/cross-industry-and-sectoral-social-dialogue/railways-sectoral-social-dialogue_en.

EIM (2020), *Statutes*, Brussels.

ETF (2022), *Constitution of the European Transport Workers Federation*.

Eurofound (2017), 'Representativeness study of the European social partner organisations: Railways and urban public transport', *Sectoral Social Dialogue Series*, Dublin.

Eurofound (2024), 'Representativeness of the European social partner organisations: Road transport sector', *Sectoral Social Dialogue Series*, Dublin.

European Commission: Directorate-General for Communication (2025), 'Connecting Europe through high-speed rail', European Commission website, 5 November, https://commission.europa.eu/news-and-media/news/connecting-europe-through-high-speed-rail-2025-11-05_en.

European Commission: Directorate-General for Mobility and Transport (2025), *Ninth monitoring report on the development of the rail market*, Publications Office of the European Union, Luxembourg.

European Commission: Directorate-General for Mobility and Transport (undated (A)), 'Railway packages', European Commission website, https://transport.ec.europa.eu/transport-modes/rail/railway-packages_en.

European Commission: Directorate-General for Mobility and Transport (undated (B)), 'Market', European Commission website, https://transport.ec.europa.eu/transport-modes/rail/market_en.

Eurostat (2026), 'Enterprise statistics by size class and NACE Rev. 2 activity (from 2021 onwards)' [SBS], 10 March 2026, https://doi.org/10.2908/SBS_SC_OVW.

L&R Social Research (2025), *New women in rail (WiR)-report 2025,* EVA, Berlin.

Treaty on the functioning of the European Union (OJ C 326, 26.10.2012, p. 13, ELI: http://data.europa.eu/eli/treaty/teu_2012/oj).

UTPF (Union des Transports Publics et ferroviaires) (2023), *Bilan social – Branche ferroviaire 2022 – Edition 2023*, Paris

Annex

Table 62: List of national sectoral trade unions included in the study, EU-25, 2024

Member State	Name in original language	Abbreviation in original language	Full name in English
AT	**Verkehrs- und Dienstleistungsgewerkschaft Gewerkschaft vida**	**Vida**	**Vida Transport and Services Union**
BE	**Algemeen Belgische Vakverbond Bond voor Bedienden, Technici en Kaderleden / Fédération générale du travail de Belgique Syndicat des Employés, Techniciens et Cadres**	**ABVV BBTK / FGTB SETCa**	**General Labour Federation of Belgium Union of Employees, Technicians and Executives**
BE	**Algemeen Christelijk Vakverbond / Confédération des syndicats chrétiens Transcom**	**ACV / CSC Transcom**	**Confederation of Christian Trade Unions Transcom**
BE	**Algemeen Christelijk Vakverbond Puls / Confédération des syndicats chrétiens Centrale Nationale Des Employes**	**ACV Puls / CSC CNE**	**Confederation of Christian Trade Unions National Employees' Union**
BE	**Algemene Centrale der Openbare Diensten / Centrale Générale des Services Publics**	**ACOD/CGSP**	**General Union of Public Services**
BE	Metisp-Protect	Metisp-Protect	Metisp Protect
BE	Onafhankelijke Vakbond Spoorwegpersoneel / Syndicat Indépendant des Cheminots	OVS/SIC	Independent Railway Workers' Union
BE	Syndicat Autonome des Conducteurs de Train / Autonoom Syndicaat van TreinBestuurders	SACT/ASTB	Autonomous Syndicate of Train Drivers
BE	**Synova** ([61])	**Synova**	**Synova**
BE	**Vrij Syndicaat voor het Openbaar Ambt / Syndicat Libre de la Fonction Publique**	**VSOA/SLFP**	**Independent Trade Union for Public Sector Workers**
BG	**Национален железничарски синдикат**	**НЖС**	**National Railway Workers' Union**
BG	**Синдикат на железничарите в България**	**СЖБ**	**Bulgarian Railway Workers' Union**
BG	**Синдикат на локомотивния персонал в България**	**СЛПБ**	**Bulgarian Locomotive Drivers' Union**
BG	**Съюз на транспортните синдикати в България**	**СТСБ**	**Federation of Transport Trade Unions in Bulgaria**
BG	**Федерация транспортните работници Подкрепа**	**ФТР Подкрепа**	**Podkrepa Federation of Transport Workers**

([61]) Formerly known as Algemene Centrale der Liberale Vakbonden van België / Centrale générale des syndicats libéraux de Belgique (the General Confederation of Liberal Trade Unions of Belgium).

Member State	Name in original language	Abbreviation in original language	Full name in English
CZ	**Aliance drážního provozu**	**ADP**	**Railway Operations Alliance**
CZ	**Cech strojvůdců České Republiky**	**CS ČR**	**Guild of Engine Drivers of Czechia**
CZ	**Demokratická Unie Odborářů**	**DUO**	**Democratic Union of Trade Unions**
CZ	**Federace strojvůdců České Republiky**	**FSČR**	**Engine Engineers' Federation of Czechia**
CZ	**Federace vlakových čet**	**FVČ**	**Federation of Train Crews**
CZ	**Federace vozmistrů**	**FV**	**Federation of Carriage Examiners**
CZ	**Federace železničářů ČR**	**FŽ ČR**	**Federation of Railway Workers of Czechia**
CZ	**Odborová organizace odpovědných zaměstnanců státu z.s.**	**OOOZS**	**Trade Union of Senior Government Officials**
CZ	**Odborové sdružení zaměstnanců síťových odvětví**	**OSZSO**	**Trade Union of Network Sector Employees**
CZ	**Odborové sdružení železničářů**	**OSŽ**	**Railway Workers' Union**
CZ	**Pro Libertate**	**Pro Libertate**	**Pro Libertate**
CZ	**Svaz odborářů služeb a dopravy**	**SOSAD**	**Union of Service and Transportation Workers**
CZ	**Unie železničních zaměstnanců**	**UŽZ**	**Railway Employees' Union**
DE	**Eisenbahn- und Verkehrsgewerkschaft**	**EVG**	**Rail and Transport Union**
DE	**Gewerkschaft Deutscher Lokomotivführer**	**GDL**	**Union of German Train Drivers**
DE	**Vereinte Dienstleistungsgesellschaft**	**ver.di**	**United Services Union**
DK	**Danmarks Jurist- og Økonomiforbund**	**Djøf**	**Danish Association of Lawyers and Economists**
DK	**Dansk Jernbaneforbund**	**DJF**	**Danish Railway Union**
DK	**Dansk Magisterforening**	**DM**	**Danish Association of Masters and PhDs**
DK	**Dansk Metal**	**DMF**	**Danish Metal Workers' Union**
DK	**Faglig Fælles Forbund**	**3F**	**United Federation of Workers**
DK	**Handels- og Kontorfunktionærernes Forbund**	**HK**	**Union of Commercial and Clerical Employees**
DK	**Ingeniørforeningen I Danmark**	**IDA**	**Danish Society of Engineers**
EE	**Eesti Raudteelaste Ametiühing**	**ERAÜ**	**Estonian Railway Workers' Union**
EE	**Eesti Vedurimeeste Ametiühing**	**EVAÜ**	**Estonian Locomotive Drivers' Union**
EL	Πανελλήνια Ένωση Προσωπικού Έλξης	ΠΕΠΕ	Panhellenic Union of Locomotive Personnel
EL	Πανελλήνια Ομοσπονδία Σιδηροδρομικών και Μέσων Σταθερής Τροχιάς	ΠΟΣ	Panhellenic Federation of Railways and Fixed-track Transport Workers
EL	**Σωματείο Εργαζομένων ΟΣΕ**	**ΣΕΟ**	**OSE Workers' Union**

Member State	Name in original language	Abbreviation in original language	Full name in English
EL	**Σωματείο Εργαζομένων Προσωπικού ΤΡΑΙΝΟΣΕ**	**ΣΕΠ ΤΡΑΙΝΟΣΕ**	**Trainose Employees' Union**
ES	**Eusko Langileen Alkartasuna**	**ELA-**Gizalan	**Basque Workers' Solidarity**
ES	**Federación de Servicios a la Ciudadanía de Comisiones Obreras**	**FSC-CCOO**	**Federation of Citizen Services Workers' Commissions**
ES	**Federación de Servicios, Movilidad y Consumo de la Unión General de Trabajadores**	**FeSMC-UGT**	**General Union of Workers' Federation of Services, Mobility and Consumer Affairs**
ES	**Sector Federal Ferroviario de la Confederación General del Trabajo**	**SFF-CGT**	**General Confederation of Labour, Federal Railway Sector**
ES	**Sindicato Alternativa Ferroviaria**	**Alferro**	**Alternative Railway Union**
ES	**Sindicato de Circulación Ferroviario**	**SCF**	**Railway Traffic Union**
ES	**Sindicato Español de Maquinistas Ferroviarios**	**SEMAF**	**Spanish Union of Railway Engineers**
ES	**Sindicato Ferroviario**	**SF-Intersindical**	**Railway Union**
FI	**Julkisten ja hyvinvointialojen liitto**	**JHL**	**Trade Union for the Public and Welfare Sectors**
FI	**Raideliikenteen esihenkilöt ja asiantuntijat**	**RLEA**	**Rail Transport Supervisors and Experts Association**
FI	**Raideliikenteen teknisten ja toimihenkilöiden liitto ry**	**RTTL**	**Union of Rail Transport Technical and Administrative Staff**
FI	**Rautatiealan unioni**	**RAU**	**Finnish Railway Union**
FR	**Confédération Française des Travailleurs Chrétien Fédération Générale des Transports**	**FGT-CFTC**	**French Confederation of Christian Workers General Federation of Transport**
FR	**Confédération générale du travail des cheminots**	**CGT-Cheminots**	**General Confederation of Railway Workers' Unions**
FR	**Fédération de l'Equipement, de l'Environnement, des Transports et des Services Force Ouvrière**	**FEETS-FO**	**Federation of Infrastructure, Environment, Transport and Services – Labour Force**
FR	**Fédération Générale des Transports et de l'Environnement – Confédération française démocratique du travail – Cheminots**	**UFCAC**	**General Federation of Transport and the Environment – French Democratic Confederation of Labour – Railway Workers**
FR	**SUD-Rail**	**SUD-Rail**	**SUD Rail**
FR	**Union Nationale des Syndicats Autonomes-Ferroviaire**	**UNSA-Ferroviaire**	**National Union of Autonomous Workers' Unions – Railway**
HR	**Sindikat hrvatskih željezničara**	**SHŽ**	**Croatian Railway Workers' Union**
HR	**Sindikat infrastrukture Hrvatskih željeznica**	**SIHŽ**	**Infrastructure Union of Croatian Railways**
HR	**Sindikat prometnika vlakova Hrvatske**	**SPVH**	**Croatian Train Operators' Union**
HR	**Sindikat strojovođa Hrvatske**	**SSH**	**Croatian Train Drivers' Union**
HR	**Sindikat željezničara Hrvatske**	**SŽH**	**Railway Workers' Trade Union of Croatia**
HU	**Mozdonyvezetők Szakszervezete**	**MOSZ**	**Train Drivers' Trade Union**

Member State	Name in original language	Abbreviation in original language	Full name in English
HU	**Vasutasok Szakszervezete**	**VSZ**	**Railway Workers' Union**
HU	**Vasúti Dolgozók Szabad Szakszervezete Szolidaritás**	**VDSZSZ**	**Free Trade Union of Railway Workers Solidarity**
IE	**Connect**	**Connect**	**Connect**
IE	**National Bus and Rail Union**	**NBRU**	**National Bus and Rail Union**
IE	**Services, Industrial, Professional and Technical Union**	**SIPTU**	**Services, Industrial, Professional and Technical Union**
IE	**Transport Salaried Staffs' Association**	**TSSA**	**Transport Salaried Staffs' Association**
IE	**Unite**	**Unite**	**Unite**
IT	**Federazione Autonoma dei Sindacati dei Trasporti – Confederazione generale dei sindacati autonomi dei lavoratori**	**FAST-Confsal**	**Autonomous Federation of Transport Trade Unions – General Confederation of Autonomous Workers' Unions**
IT	**Federazione Autonoma Italiana Sindacale Autoferrotranvieri**	**FAISA CISAL**	**Autonomous Italian Federation of Bus, Rail and Tram Workers' Unions**
IT	**Federazione Italiana Lavoratori Trasporti – Confederazione Generale Italiana del Lavoro**	**FILT-CGIL**	**Italian Federation of Transport Workers – Italian General Confederation of Labour**
IT	**Federazione Italiana Trasporti – Confederazione Italiana Sindacati Lavoratori**	**FIT-CISL**	**Italian Transport Federation – Italian Confederation of Workers' Unions**
IT	**Organizzazione Sindacati Autonomi e di Base – Settore Ferrovie**	**Or.S.A. Ferrovie**	**Organisation of Autonomous and Grassroots Trade Unions – Railways Sector**
IT	**Syndicat Autonome Valdôtain des Travailleurs**	**SAVT**	**Autonomous Trade Union of Valdôtain Workers**
IT	**Unione Generale Lavoratori Ferrovieri**	**UGL Ferrovieri**	**Railway Transport Workers' Union**
IT	**Unione Italiana Lavoratori Trasporti**	**Uiltrasporti**	**Italian Transport Workers' Union**
LT	**Lietuvos geležinkelininkų profesinių sąjungų susivienijimas**	**LGPSS**	**Federation of Lithuanian Railway Workers' Unions**
LT	**Lietuvos geležinkelininkų profsąjungų federacija**	**LGPF**	**Federation of Lithuanian Public Service Trade Unions**
LU	**Confédération luxembourgeoise des syndicats chrétiens-Transport**	**LCGB-Transport**	**Luxembourg Confederation of Christian Trade Unions – Transport**
LU	**Onofhängege Gewerkschaftsbond Lëtzebuerg Syndicat des chemins de fer / FNCTTFEL-Landesverband**	**OGB-L Syndicat des chemins de fer / FNCTTFEL-Landesverband**	**Independent Trade Unions Confederation – Luxembourg Railway Union**
LU	Syprolux	Syprolux	Syprolux
LV	**Latvijas Dzelzceļnieku un satiksmes nozares arodbiedrība**	**LDZSA**	**Latvian Railway and Transportation Workers' Union**
NL	**Christelijk Nationaal Vakverbond**	**CNV**	**Christian National Trade Union Federation**
NL	**Federatie Nederlandse Vakbeweging**	**FNV**	**Federation of Dutch Trade Unions**

Member State	Name in original language	Abbreviation in original language	Full name in English
NL	**Het Zwarte Corps**	**HZC**	**The Black Corps**
NL	**Vakvereniging Voor Machinisten en Conducteuren**	**VVMC**	**Trade Union for Train Drivers and Conductors**
NL	Vereniging van Hogere Spoorwegambtenaren	VHS	Association of Senior Railway Officials
PL	Forum Związków Zawodowych	FZZ	Trade Unions Forum
PL	**Krajowa Sekcja Kolejarzy Niezależny Samorządny Związek Zawodowy Solidarność**	**KSK NSZZ Solidarność**	**Independent Autonomous Union Solidarity – National Railway Workers' Section**
PL	**Ogólnopolskie Porozumienie Związków Zawodowych**	**OPZZ**	**All-Poland Alliance of Trade Unions**
PT	**Associação Sindical das Chefias Intermédias de Exploração Ferroviária**	**ASCEF**	**Trade Union Association of Intermediate Railway Managers**
PT	**Associação Sindical dos Profissionais do Comando e Controlo Ferroviário**	**Aprofer**	**Trade Union Association of Railway Command and Control Professionals**
PT	**Sindicato dos Trabalhadores do Metro e Ferroviários**	**STMEFE**	**Metro and Railway Workers' Union**
PT	**Sindicato dos Transportes Ferroviários**	**STF**	**Railway Transport Union**
PT	**Sindicato Ferroviário da Revisão e Comercial Itinerante**	**SFRCI**	**Union for Railway Inspection and Itinerant Sales Staff**
PT	**Sindicato Independente do Serviço Comercial**	**Assifeco**	**Independent Trade Union for the Commercial Sector**
PT	**Sindicato Independente dos Ferroviários e Afins**	**SIFA**	**Independent Railway and Allied Workers' Union**
PT	**Sindicato Independente dos Operacionais Ferroviários e Afins**	**SIOFA**	**Independent Union of Railway and Related Workers**
PT	**Sindicato Independente dos Trabalhadores Ferroviários, das Infraestruturas e Afins**	**SINFA**	**Independent Union of Railway, Infrastructure and Related Workers**
PT	**Sindicato Independente Nacional dos Ferroviários**	**SINFB**	**National Independent Railwaymen's Union**
PT	**Sindicato Nacional Democrático da Ferrovia**	**Sindefer**	**National Democratic Railway Union**
PT	**Sindicato Nacional dos Ferroviários do Movimento e Afins**	**Sinafe**	**National Union of Railway Workers and Related Professions**
PT	**Sindicato Nacional dos Maquinistas dos Caminhos de Ferro Portugueses**	**SMAQ**	**National Union of Portuguese Railway Train Drivers**
PT	**Sindicato Nacional dos Trabalhadores do Sector Ferroviário**	**SNTSF**	**National Union of Railway Workers**
PT	**Sindicato Nacional dos Trabalhadores dos Transportes e Indústria**	**Sintti**	**National Union of Transport and Industry Workers**
PT	**Sindicato Nacional dos Transportes, Comunicações e Obras Públicas**	**Fentcop**	**National Union of Transport, Communications and Public Works**
PT	**Sindicato Nacional Ferroviário do Pessoal de Trens**	**Sitrens**	**National Union of Railway Train Staff**
RO	**Alianța Federațiilor Tehnice Feroviare**	**AFTF**	**Alliance of Technical Railway Federations**
RO	**Alianța Sindicală a Federațiilor 'Drum de Fier – Elcatel'**	**Elcatel**	**Trade Union Alliance of 'Iron Road – Elcatel' Federations**

Member State	Name in original language	Abbreviation in original language	Full name in English
RO	**Federația Mecanicilor de Locomotivă din România**	**FML**	**Locomotive Drivers' Federation of Romania**
RO	**Federația Națională Feroviară Mișcare Comercial Vagoane**	**FNFMCV**	**National Railway Federation of Commercial Wagons**
RO	**Federația Sindicatelor Alfa Transport**	**FSAT**	**Alfa Transport Trade Union Federation**
SE	**Fackförbundet ST**	**ST**	**Civil Servants' Union**
SE	**Ledarna**	**Ledarna**	**Ledarna**
SE	**Service- och kommunikationsfacket**	**Seko**	**Swedish Union for Service and Communications Employees**
SE	**SRAT Trafik och Järnväg**	**SRAT TJ**	**SRAT Traffic and Railways**
SE	**Sveriges Ingenjörer**	**Sveriges Ingenjörer**	**Swedish Engineers**
SE	Unionen	Unionen	Unionen
SI	**Sindikat delavcev železniške dejavnosti Slovenije**	**SDŽDS**	**Slovenian Union of Railway Workers**
SI	**Sindikat strojevodij Slovenije**	**SSSLO**	**Union of Train Drivers of Slovenia**
SI	**Sindikat vozovnih preglednikov Slovenije**	**SVPS**	**Union of Train Inspectors of Slovenia**
SI	**Sindikat vzdrževalcev lokomotiv Moste**	**SVLM**	**Moste Locomotive Maintenance Workers' Union**
SI	**Sindikat vzdrževalcev železniških voznih sredstev Slovenije**	**SVŽVS**	**Union of Railway Rolling Stock Maintenance Workers of Slovenia**
SI	**Sindikat železničarjev Slovenije**	**SŽS**	**Railway Workers' Union of Slovenia**
SI	**Sindikat železniškega prometa Slovenije**	**SŽPS**	**Railway Traffic Union of Slovenia**
SI	**Sindikat železniškega transporta Slovenije**	**SŽTS**	**Railway Transport Union of Slovenia**
SI	**Sindikati slovenskih železnic**	**SSŽ**	**Slovenian Railways Trade Union Association**
SK	**Federácia strojvodcov Slovenskej republiky**	**FS SR**	**Slovakian Federation of Train Drivers**
SK	**Federácia vlakových čiat**	**FVČ**	**Federation of Train Crews**
SK	**Odborové združenie železničiarov**	**OZŽ**	**Railway Workers' Union**

Note: Bold font used for organisations involved in collective bargaining.

Source: Network of Eurofound Correspondents.

Table 63: List of national sectoral employer organisations included in the study, EU-25, 2024

Member State	Name in original language	Abbreviation in original language	Full name in English
AT	**Fachverband Schienenbahnen**	**FVSCH**	**Federal Association of Rail Transport**
BE	**HR Rail**	**HR Rail**	**HR Rail**

Member State	Name in original language	Abbreviation in original language	Full name in English
BE	**Werkgeversfederatie voor de Internationale Handel, het Vervoer en de Logistiek**	**WF-FE**	**Employers Association for International Trade, Transport and Logistics**
CZ	Sdružení železničních nákladních dopravců České republiky	Žesnad	Association of Railway Freight Carriers of Czechia
CZ	Svaz dopravy České republiky	SD ČR	Transport Association of Czechia
DE	**Arbeitgeber- und Wirtschaftsverband der Mobilitäts- und Verkehrsdienstleister**	**AGV MOVE**	**Employers and Business Association of Mobility & Transport Service Providers**
DE	**Arbeitgeberverband Deutscher Eisenbahnen**	**AGVDE**	**German Railway Operators' Association**
DE	Die Güterbahnen	Die Güterbahnen	Freight Railways
DE	Verband Deutscher Verkehrsunternehmen	VDV ([62])	Association of German Transport Companies
DK	Arbejdsgiverforeningen for Kollektiv Trafik	AKT	The Employers' Association for Public Transport
DK	**Jernbanernes Arbejdsgiverforening**	**JA**	**The Railway Employers' Association**
ES	**Asociación de Empresas de Servicios Ferroviarios**	**Agesfer**	**Association of Railway Services Companies**
ES	**Unión de Empresas de Contratas Ferroviarias**	**Unecofe**	**Union of Railway Contracting Companies**
FI	**Palta**	**Palta**	**Palta**
FR	**Syndicat des auxiliaires de la manutention et de l'entretien pour le rail**	**Samera**	**Rail Handling and Maintenance Workers' Union**
FR	**Union des Transports Publics et Ferroviaires**	**UTPF**	**Union of Public Transport and Railways**
HU	Magyar Vasúti, Vízi- és Légiközlekedési Szövetség	MVVLSZ	Hungarian Railway, Water and Air Transport Association
IT	**Agenzia Confederale dei Trasporti e dei Servizi**	**AGENS**	**Confederal Agency for Transport and Services**
IT	Associazione Operatori Ferroviari e Intermodali	Assoferr	Association of Railway and Intermodal Operators
IT	**Associazione Trasporti**	**Asstra**	**Transport Association**
IT	Confederazione del Cargo Ferroviario	Fercargo	Rail Freight Confederation
LT	**Lietuvos geležinkelių įmonių asociacija**	**LGĮA**	**Association of Lithuanian Railways Companies**
PL	Centralny Port Komunikacyjny	CPK	Central Communication Port
PL	Izba Gospodarcza Transportu Lądowego	IGTL	Chamber of Commerce for Land Transport
PL	Pracodawcy Rzeczpospolitej Polski	Pracodawcy RP	Employers in the Republic of Poland
PL	Zwiazek Niezaleznych Przewoznikow Kolejowych	ZNPK	Association of Independent Railway Operators

([62]) VDV is a business association, not an employer organisation.

Member State	Name in original language	Abbreviation in original language	Full name in English
PL	**Związek Pracodawców Kolejowych**	**ZPK**	**Railway Employers' Association**
PT	Associação Portuguesa de Empresas Ferroviárias	APEF	Portuguese Association of Railway Companies
RO	Asociația Industriei Feroviare din România	AIF	Romanian Railway Industry Association
RO	Organizația Patronală a Societăților Feroviare Private din România	OPSFPR	Employers' Association of Private Railway Companies in Romania
SE	**Almega Tågföretagen**	**Tågföretagen**	**Association of Swedish Train Operating Companies**
SE	**Byggföretagen**	**Byggföretagen**	**Swedish Construction Federation**
SI	Gospodarska zbornica Slovenije	GZS	Chamber of Commerce and Industry of Slovenia
SK	Asociácia železničných dopravcov Slovenska	AROS	Association of Railways Operators of Slovakia
SK	Únia dopravy, pôšt a telekomunikácií Slovenskej republiky	ÚDPT	Slovakian Union of Transport, Post and Telecommunications

Note: Bold font used for organisations involved in collective bargaining.

Source: Network of Eurofound Correspondents.

Table 64: List of the railway ESSDC's agreements, opinions and actions, since 1986

Date	Title	Theme	Type
5.2.2025	Transforming rail freight: A joint call for sustainable and efficient transport (CER, ETF)	Sustainable development	Joint opinion
23.3.2023	Joint recommendation for the revision of the Train Drivers Directive (CER, ETF)	Economic and/or sectoral policies	Joint opinion
5.12.2022	Joint statement by the European social partners in the railway sector ETF and CER on the revision of the Train Drivers Directive (2007/59/EC) (CER, ETF)	Economic and/or sectoral policies	Joint opinion
5.11.2021	Women in rail – EU social partner agreement (CER, ETF)	Gender equality	Autonomous agreement
3.12.2020	Declaration by the European social partners in the railway sector ETF and CER on the COVID-19 pandemic, the outstanding performance of the employees and necessary measures for the future of the railways (CER, ETF)	Economic and/or sectoral policies	Declaration
9.4.2020	Sixth annual report on the development of women's employment in the European railway sector (CER, ETF)	Gender equality	Follow-up report
4.7.2019	Assessment of the implementation and application of the agreement on certain aspects of working conditions of mobile workers engaged in interoperable cross-border services in the railway sector (CER, ETF)	Working conditions	Follow-up report

Date	Title	Theme	Type
11.2.2019	Fifth annual report on the development of women's employment in the European railway sector (CER, ETF)	Gender equality	Follow-up report
1.12.2017	Fourth annual report on the development of women's employment in the European railway sector (CER, ETF)	Gender equality	Follow-up report
11.10.2016	Third annual report on the development of women's employment in the European railway sector (CER, ETF)	Gender equality	Follow-up report
2.12.2015	Rail freight declaration	Economic and/or sectoral policies	Joint opinion
31.12.2014	Second annual report on the development of women's employment in the European railway sector (CER, ETF)	Gender equality	Follow-up report
11.3.2014	Joint recommendations – Identify and prevent psychosocial risks within the railway sector	Health and safety	Recommendations
21.1.2014	Results of the 2013 questionnaire on the development of women employment in the railway sector in Europe (CER, ETF)	Gender equality	Follow-up report
31.10.2013	Social aspects and the protection of staff in case of change of railway operator: The current situation (CER, ETF)	Social aspects of Community policies	Report
31.10.2013	PSR Rail – A guide to identifying and preventing psychosocial risks at work in the railway sector (CER, ETF)	Health and safety	Tool
23.9.2013	Social aspects and the protection of staff in competitive tendering of rail public transport services and in the case of change of railway operator (CER, ETF)	Social aspects of Community policies	Joint opinion
5.12.2012	Promoting security and the feeling of security vis-à-vis third-party violence in the European railway sector – Recommendations of the European railway sector social partners (CER, ETF)	Harassment	Policy orientations
5.12.2012	Promoting security and the feeling of security vis-a-vis third-party violence in the European rail sector – A good practice guide (CER, ETF)	Harassment	Tool
14.6.2012	WiR – Women in Rail – Good practices and implementation guide (CER, EIM, ETF)	Gender equality	Tool
30.3.2012	Follow-up of the joint recommendations better representation and integration of women in the railway sector – Implementation, evaluation, review (CER, ETF)	Gender equality	Follow-up report
24.2.2011	Employability in the face of demographic change – Prospects for the European rail sector (CER, EIM, ETF)	Working conditions	Tool
12.7.2010	Joint recommendations for better representation and integration of women in the railway sector – Status and how to apply the joint recommendations (CER, ETF)	Gender equality	Follow-up report
8.4.2010	Follow-up of the agreement on the working conditions of mobile workers engaged in interoperable cross-border services (CER, ETF)	Working conditions	Follow-up report

Date	Title	Theme	Type
10.6.2009	Joint declaration of the CER–ETF agreement on a European locomotive driver's licence (CER, ETF)	Working conditions	Guidelines
1.2.2009	Freight business restructuring and its impact on employment (CER, ETF)	Restructuring	Report
4.10.2007	The concept of employability in the railway sector – Recommendations (CER, EIM, ETF)	Working conditions	Policy orientations
12.6.2007	Joint recommendations for a better representation and integration of women in the railway sector (CER, ETF)	Gender equality	Policy orientations
17.4.2007	Rules of procedure of dialogue committee in the railways sector (CER, EIM, ETF)	Social dialogue	Procedural text
17.4.2007	Joint declaration on internalisation of external cost in transport for an acceleration of Community activities (CER, EIM, ETF)	Economic and/or sectoral policies	Joint opinion
1.11.2006	The social dialogue in the rail sector (CER, ETF)	Social dialogue	Tool
19.5.2006	Relation between the European social partners in the railway sector and the European Railway Agency (CER, EIM, ETF)	Social aspects of Community policies	Joint opinion
19.5.2006	Common position on the mid-term review of the 2001 White Paper on European transport policy (CER, EIM, ETF)	Economic and/or sectoral policies	Joint opinion
27.4.2005	Representation and better integration of women in the different professions of the railway sector (CER, ETF)	Gender equality	Tool
1.11.2004	The social dialogue in the rail sector (CER, ETF)	Social dialogue	Joint opinion
27.5.2004	Recommendation of the European social partners in the railway sector on the revision of the Eurovignette Directive (CER, ETF)	Economic and/or sectoral policies	Joint opinion
27.1.2004	Agreement on certain aspects of the working conditions of railway mobile workers assigned to interoperable cross-border services (CER, ETF)	Working conditions	Agreement
27.1.2004	Agreement on the European licence for drivers carrying out a cross-border interoperability service (CER, ETF)	Working conditions	Agreement
11.1.2001	The 'employability' concept – usable by European rail companies? Report of the 'employability' working group of the Committee for the European sectoral social dialogue railway (CER, ETF)	Training / lifelong learning	Tool
8.6.1999	Joint opinion of the Community of European railways and Federation of European Transport Union on the 'infrastructure package' as presented by the European Commission (CER, ETF)	Economic and/or sectoral policies	Joint opinion
30.9.1998	Agreement on some aspects of the organisation of working time in the rail transport sector (CER, ETF)	Working time	Joint opinion

Date	Title	Theme	Type
23.6.1998	Opinion of the Joint Committee about the communication of the Commission about the implementation and impact of Directive 91/440 and about the access rights to railway freight transport (CER, ETF)	Economic and/or sectoral policies	Joint opinion
3.6.1997	Common position adopted by the Joint Committee on Railways on the White Paper of the European Commission entitled 'A strategy for revitalising community railways' (CER, ETF)	Economic and/or sectoral policies	Joint opinion
3.6.1997	Common opinion of the Joint Committee on Railways on the effects of the establishment of the freeways (CER, ETF)	Economic and/or sectoral policies	Joint opinion
3.6.1997	Joint opinion on the organisation of working time (CER, ETF)	Working time	Joint opinion
8.2.1996	Opinion of the Joint Committee on Railways on the communication from the Commission on the development of the Community's railways (CER, ETF)	Economic and/or sectoral policies	Joint opinion
8.2.1996	Organisation of working time – Common position of the Joint Committee for Railways (CER, ETF)	Working time	Joint opinion
28.6.1994	Opinion on Directive 91/440/EEC (CER, ETF)	Economic and/or sectoral policies	Joint opinion
1.10.1993	Opinion on the European Commission's draft directive on the licensing of railway undertakings (CER, ETF)	Economic and/or sectoral policies	Joint opinion
1.10.1993	Opinion on the European Commission's draft directive on the allocation of railway infrastructure capacity and the charging of infrastructure fees (CER, ETF)	Economic and/or sectoral policies	Joint opinion
1.10.1993	Opinion on the Commission's White Paper on the future development of the common transport policy (CER, ETF)	Economic and/or sectoral policies	Joint opinion
1.10.1992	Opinion on the Green Paper on the impact of transport on the environment: A Community strategy for 'sustainable mobility' (CER, ETF)	Sustainable development	Joint opinion
1.11.1990	Opinion on the communication on a Community railway policy (CER, ETF)	Economic and/or sectoral policies	Joint opinion
1.12.1988	Opinion on the development of railway infrastructure with regard to the elaboration of a TGV network for passenger traffic; faster freight traffic (CER, ETF)	Economic and/or sectoral policies	Joint opinion
1.12.1988	Opinion concerning the development of combined transport (CER, ETF)	Economic and/or sectoral policies	Joint opinion
1.2.1988	Opinion on the liberalisation of the internal market in 1992; Commission proposal on the improvement of the situation of railway undertakings and the harmonisation of rules governing financial relations between such undertakings and States (CER, ETF)	Economic and/or sectoral policies	Joint opinion
1.1.1988	Proposals for improving passenger transport (CER, ETF)	Economic and/or sectoral policies	Joint opinion

Date	Title	Theme	Type
19.11.1986	Opinion on social aspects of European transport policy (CER, ETF)	Social aspects of Community policies	Joint opinion
19.11.1986	Memorandum concerning the common transport policy (CER, ETF)	Economic and/or sectoral policies	Joint opinion

Source: Authors' compilation based on Social Dialogues library

Table 65: National Eurofound correspondents who have contributed to this study

Member State	Correspondent(s)	Organisation
AT	Bernadette Allinger	Working Life Research Centre (FORBA)
BE	Noah Vangeel	Catholic University of Leuven, Research Institute for Work and Society
BG	Gabriela Yordanova	Bulgarian Academy of Sciences
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs (RILSA)
DE	Sandra Vogel	Cologne Institute for Economic Research
DE	Thilo Janssen	Hans Böckler Foundation
DK	David Lauesen	FAOS, University of Copenhagen
DK	Mikkel Krogh	FAOS, University of Copenhagen
EE	Miriam Lehari	Praxis Centre for Policy Studies
EL	Elena Kousta	Labour Institute of the General Confederation of Greek Workers (GSEE)
ES	Pablo Sanz de Miguel	University of Zaragoza
FI	Vera Lindström	Oxford Research AB
FR	Frédéric Turlan	IR Share
FR	Victoria Fronseca	IR Share
HR	Irena Klemenčić	Faculty of Economics, Business and Tourism, University of Split
HR	Predrag Bejaković	Faculty of Economics, Business and Tourism, University of Split
HU	Nóra Krokovay	Kopint-Tárki Institute for Economic Research
HU	Szilvia Borbély	Kopint-Tárki Institute for Economic Research
IE	Rosanna Angel	IRN Publishing
IT	Alessandro Smilari	Giacomo Brodoloni Foundation
IT	Silvio Bologna	University of Palermo
LT	Inga Blažienė	Lithuanian Centre for Social Sciences (DSTI)
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
LV	Krišs Karnītis	EPC Ltd
NL	Martin Clarke	Panteia
PL	Katarzyna Dębska	Polityka Insight
PT	Reinhard Naumann	University Institute of Lisbon (ISCTE-IUL)
RO	Marcel Spatari	Syndex România
RO	Nicoleta Voicu	Centre for Public Innovation
SE	Nils Brandsma	Oxford Research AB
SE	Sydney McLoughlin Laewen	Oxford Research AB
SI	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
SK	Daniela Kešelová	Institute for Work and Family Research (IVPR)

Getting in touch with the EU

In person

All over the European Union there are hundreds of Europe Direct centres. You can find the address of the centre nearest you online (https://european-union.europa.eu/contact-eu/meet-us_en).

On the phone or in writing

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

– by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls),

– at the following standard number: +32 22999696,

– via the following form: https://european-union.europa.eu/contact-eu/write-us_en.

Finding information about the EU

Online

Information about the European Union in all the official languages of the EU is available on the Europa website (https://europa.eu).

EU publications

You can view or order EU publications at https://op.europa.eu/en/publications. Multiple copies of free publications can be obtained by contacting Europe Direct or your local documentation centre (https://european-union.europa.eu/contact-eu/meet-us_en).

EU law and related documents

For access to legal information from the EU, including all EU law since 1951 in all the official language versions, go to EUR-Lex (https://eur-lex.europa.eu).

EU open data

The portal https://data.europa.eu provides access to open datasets from the EU institutions, bodies and agencies. These can be downloaded and reused for free, for both commercial and non-commercial purposes. The portal also provides access to a wealth of datasets from European countries.

EF/26/044

TJ-01-26-028-EN-N

This study provides information allowing for an assessment of the representativeness of the organisations involved in the European sectoral social dialogue committee for the railway sector. Their relative representativeness legitimises their right to be consulted and their capacity to negotiate agreements. The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the sector. This study identifies the European Transport Workers' Federation, representing employees, and the Community of European Railway and Infrastructure Companies, with added representativeness from the European Rail Infrastructure Managers, representing employers, as the most representative European-level social partner organisations in the railway sector.

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency established in 1975. Its role is to provide knowledge in the area of social, employment and work-related policies according to Regulation (EU) 2019/127.

Publications Office
of the European Union

ISBN 978-92-897-2596-5
doi:10.2806/8334779