

R E P O R T



# DIAGNOSIS OF SANITATION AND PARKING CONDITIONS

AT LOGISTICS BASES IN  
POLAND AND IN EUROPE

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## Introduction

Without drivers, modern civilisation could not exist in its present form. This statement is not an exaggeration because without their work, in the current state of development of transport technology, industry, services, commerce and communications could not function. Without drivers, the activities of the public services responsible for order and security, healthcare, emergency services and the armed forces would be paralysed. Hence, it would be difficult to name another such profession to which we owe so much. Perhaps in the distant future, when autonomous vehicles are on the road, the importance of this profession will diminish. But today, here and now, we should do everything we can to ensure that drivers can work and rest in good conditions. Without such measures, the driver shortage that has existed for several years now will continue to grow steadily and increasingly rapidly. And this is hardly surprising. Drivers, like all of us, want to have decent working conditions and respect from society and from the people and institutions they work with on a daily basis.

It is, therefore, important to recognise the work of the Truckers Life Foundation, which has been supporting professional drivers with numerous initiatives since 2013. Especially in cases where the actions of state institutions, road infrastructure managers and other obliged entities are insufficient. As the employers' association "Transport i Logistyka Polska" (Transport and Logistics Poland), we appreciate these initiatives and we are proud that Truckers Life is a member of our association. The most recent of these initiatives, which is the research carried out and the report containing the results of this research - "Diagnosis of sanitation and parking conditions at logistics bases in Poland and in Europe" - will perhaps make the recipients of transport services reflect. Hopefully, this reflection will result in improved social and sanitation conditions at vehicle unloading and loading sites and better organisation of work reducing drivers' waiting time for these activities. The results of this research will also be helpful in discussions with the government administration on the necessary and indispensable legislative measures in this area.

Given the importance of the findings of the Foundation's research, I would like to recommend reading the report to all those who are professionally involved in road transport and logistics, as well as those who have a say in the drivers' working conditions.

**Maciej Wroński**  
**President**  
**Transport i Logistyka Polska**

## Current situation - what is it like?

### Importance of transportation and warehousing sector in Poland

Transportation is the most dynamic industry of strategic importance in the national economy. The importance of road freight transport is much greater for the national economy than the direct contribution of this industry to revenues of enterprises. These services allow the organisation of a goods supply system and the creation of an industrial supply chain in which Polish companies are integrated on a large scale into the international production system, thus influencing the development of trade-related industries. Industries that are most strongly linked to the road freight transport include, inter alia, wholesale and retail trade, paper processing, chemical processing, production of construction materials and the agri-food sector<sup>1</sup>.

### It is estimated that transport contributes significantly to almost half of Poland's GDP.

According to the TLP report "Road Transport in Poland 2021+ Report", in Poland transport companies employ about one million workers, transport more than 85% of Polish export goods and pay several billion zlotys to the national budget. The particularly important role of road transport for Polish export is related to the fact that transport opens the Polish economy to the world and thus contributes very significantly to the country's economic development - integration into the global trading system is one of the most important factors determining Poland's high economic growth<sup>2</sup>.

In the context of freight transport, there has been an **increase in the importance of the warehousing industry** in the country in recent years, and the ever-increasing demand for transport services determines the increased need for warehouse space. A warehouse can be defined as "a functional and organisational unit that is designed to store tangible goods in a separate space of a warehouse building, equipped with appropriate facilities and operated by a team of people"<sup>3</sup>. In 2022, the demand for warehouse space amounted to as much as 5.4 million square metres, representing a seven per cent increase in relation to 2021.<sup>4</sup> The

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<sup>1</sup> Transport drogowy w Polsce 2021+, Spotdata and Związek Pracodawców Transport i Logistyka Polska, p. 18-19.

<sup>2</sup> Ibidem.

<sup>3</sup> Infrastruktura magazynowa i transportowa w dobie zrównoważonego rozwoju gospodarki, Motowidlak Urszula, Tokarski Daniel, Łódź 2022, p. 50.

<sup>4</sup> Infrastruktura magazynowa i transportowa w dobie zrównoważonego rozwoju gospodarki, Motowidlak Urszula, Tokarski Daniel, Łódź 2022, p. 50.

high potential for further development of the industry is evidenced by the fact that Poland remains one of the most attractive markets for industrial and logistics investments, e.g. due to lower operating costs - entrepreneurs are looking for ways to reduce costs related to the delivery, storage, distribution and movement of goods, while warehouse rental costs, energy consumption and labour costs in Poland are among the lowest in Europe, being approximately 60% lower than in Germany<sup>5</sup>.

Today, logistics and distribution centres are one of the main tools for competing in large retail chains. Their role is to replace the retailers' existing warehouses and to manage the products' warehouses on behalf of the manufacturers. Direct distribution (from manufacturer to customer) has been almost completely replaced by a centralised logistics network, managed by modern logistics and distribution centres<sup>6</sup>. The logistics centre is thus beginning to play the main role in the supply chain.

Given the growth prospects of the industries and the year-on-year increase in demand, newly constructed warehouses and logistics centres are mostly built close to densely populated urban areas, allowing companies to collect and deliver goods from the warehouse to their destinations in a more optimal way and avoiding congestion<sup>7</sup>. However, in order to ensure high quality logistics bases and thus be competitive with bases in other European countries, it is necessary to strive to recognise the needs of professional drivers in this area and implement changes already at the planning stage of future investments. The logistics centre should have an infrastructure adapted for social and living services for drivers, whereby they could make use of free parking facilities and take the obligatory break during the working day. In the case of a longer route, drivers should be provided with hotel services within the centre, where they can rent a room with a bathroom and stay overnight in comfort, and even basic catering services<sup>8</sup>. Unfortunately, this aspect is not currently reflected in the law and is only a manifestation of the 'goodwill' of investors and developers, hence the need to raise awareness in this regard.

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<sup>5</sup> Infrastruktura magazynowa i transportowa w dobie zrównoważonego rozwoju gospodarki, Motowidlak Urszula, Tokarski Daniel, Łódź 2022, p. 50.

<sup>6</sup> Infrastruktura magazynowa i transportowa w dobie zrównoważonego rozwoju gospodarki, Motowidlak Urszula, Tokarski Daniel, Łódź 2022, p. 120.

<sup>7</sup> Infrastruktura magazynowa i transportowa w dobie zrównoważonego rozwoju gospodarki, Motowidlak Urszula, Tokarski Daniel, Łódź 2022, p. 120.

<sup>8</sup> Infrastruktura magazynowa i transportowa w dobie zrównoważonego rozwoju gospodarki, Motowidlak Urszula, Tokarski Daniel, Łódź 2022, p. 120.

## Shortage of professional drivers

Road transport is facing numerous problems, both in Poland and on a European scale. **One of the most important problems for the logistics industry is the increasing shortage of professional drivers year on year.** This problem affects the whole of Europe and is a long-standing phenomenon, hindering the development of an industry that is key to the whole economy. For many years, there has been an ongoing debate about the need to develop the transport industry in Poland and the reasons for the significant shortage of professional drivers. It is an industry where there is no downtime - ongoing regulatory changes, climate challenges, the pandemic and its impact on the global economy and the effects of the war in Ukraine, as well as insufficient development of parking infrastructure, all have to be faced<sup>9</sup>.

Professional drivers in Poland are a large professional group - the Polish logistics sector currently employs around 800 000 people, of which  $\frac{3}{4}$  fall into the category of road transport and half of them are drivers<sup>10</sup>. Although there is no data available to provide an accurate estimate of the number of professionally active heavy goods vehicle drivers, **a shortage of more than 20 percent of professional drivers is identified.**

Given the ever-increasing demand for growth in the logistics industry, it is estimated that there should be around 200,000 more active professional drivers on the market. In addition, 1/3 of the working population is close to retirement age and around 25,000 people leave the profession each year<sup>11</sup>. This is an ageing professional group, with more than 1/3 of people who are over 50 years old. This group is also characterised by a low rate of inflow of young representatives of the profession. In the last decade of 2021, average employment increase in road transport amounted to 4.6 percent per year, while transport work grew at a rate of around 6 percent per year. According to Inelo data from the TLP report "Road Transport in Poland 2021+ Report", 34.6 percent of drivers are at least 50 years old and only 6.5 percent of drivers are under 30 years old.

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<sup>9</sup> Infrastruktura magazynowa i transportowa w dobie zrównoważonego rozwoju gospodarki, Motowidlak Urszula, Tokarski Daniel, Łódź 2022, p. 120.

<sup>10</sup> Infrastruktura magazynowa i transportowa w dobie zrównoważonego rozwoju gospodarki, Motowidlak Urszula, Tokarski Daniel, Łódź 2022, p. 120.

<sup>11</sup> Infrastruktura magazynowa i transportowa w dobie zrównoważonego rozwoju gospodarki, Motowidlak Urszula, Tokarski Daniel, Łódź 2022, p. 120.

**Demand for labour is, therefore, growing much faster than the supply of workers**, and consequently conditions for growth are increasingly difficult. In 2018, the number of active professional drivers in Poland was estimated to be around 500,000-550,000 active drivers working in the road haulage sector, compared to an estimated number of around 600,000-650,000 drivers in 2015<sup>12</sup>. In 2016, the estimated number of drivers obtaining their initial qualification was around 35,000 per year<sup>13</sup>. Attracting new employees to the profession is, therefore, one of the industry's biggest challenges due to the fact that an insufficient number of drivers will lead to a further increase in the industry's payroll costs and may result in higher freight rates. The deployment of autonomous vehicles will not cover this shortage in the short term<sup>14</sup>. Transport companies have so far launched a number of measures aimed at both attracting new employees and preventing the exodus of existing employees, through measures such as raising wages, upgrading fleets, hiring employees from other countries, especially from the East. However, these measures are still not yielding the expected results. The profession of driver is not very popular, especially among the young.

### **Professional drivers' earnings**

**In the context of the shortage of professional drivers, it is necessary to analyse the issue of average pay. Despite the shortage of professional drivers, the average monthly salary in this professional group is not increasing significantly.** According to data from the Central Statistical Office (GUS) for 2021, the average salary in transport companies is increasing annually by around 7%. In transport and warehousing in general, the average monthly salary was PLN 5092.64 gross, and in 2021 lorry drivers earned an average of PLN 6310, thus constituting a higher-than-average salary. For professional drivers, the average salary in 2021 increased slightly in comparison to 2020, namely by PLN 99<sup>15</sup>.

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<sup>12</sup> The value cannot be estimated accurately due to the fact that there is no institution in Poland that comprehensively collects data on the total number of persons holding qualifications required for the profession of driver (initial qualification).

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## Problems encountered

The estimated shortage of drivers (with sufficient skills) in the labour market in relation to the projected transport volume in 2022 is 200,000. The report *Transport of the Future. Report on the prospects for the development of road transport in Poland in 2020-2030* identified five challenging areas in terms of social factors having the greatest impact on the industry<sup>16</sup>:

1. The projected increase in industry turnover will translate into increased demand for labour, which could **exacerbate the driver shortage over the next five years**. Estimates suggest that there could be a shortage of 200,000 drivers by 2022 due to a negative balance of entering and exiting the profession while the industry keeps growing.
2. Sustaining labour supply is at risk due to the age structure of the industry and the increase in drivers' expectations of the standard of living (competition from other industries, insufficient quality of rest and refreshment facilities, long routes performed away from home), which could **widen the gap in relation to demand**.
3. In terms of market entry, **inadequate driver training resources and high training costs can be a constraint to efficient transport operations**, and measures taken to bridge the gap between demand and supply do not fully address the problem. Further action is required in this area.
4. **Driver migration will not be able to fill the gap, as drivers from across the eastern border meeting transporters' needs are already beginning to be in short supply**. An interim solution could be to recruit drivers from Asian countries (e.g. the Philippines, Vietnam, Nepal, Uzbekistan, Kazakhstan, Tajikistan), but there is already a shortage of drivers in these countries; moreover, this solution could involve additional costs for employers and longer hiring times due to formal procedures.
5. **The substitute for human labour in the form of technology is not sufficiently developed yet** to fill staffing gaps, and rising wages for drivers no longer solve the problem. In the transport sector, full automation will only be possible in 5 to 10 years at the earliest.

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<sup>16</sup> Transport przyszłości. Raport o perspektywach rozwoju transportu drogowego w Polsce w latach 2020-2030, PWC i Związek Pracodawców Transport i Logistyka Polska, p. 42.

However, the report *Driver Labour Market in Poland* draws attention to a very important aspect, i.e. the level of job satisfaction of professional drivers, as it is the working conditions and demands placed on drivers that may be the reason for their dissatisfaction and leaving their jobs<sup>17</sup>. For the purposes of the report, a driver satisfaction survey was carried out, the results of which indicated that, on average, drivers' job satisfaction is not high, which may be one of the reasons for the relatively frequent change of employer or profession - one in five drivers surveyed had considered changing their profession or at least employer and a quarter had planned to do so in the near future. The most frequently cited reason for dissatisfaction was working conditions, including the quality and mode of work, the quality of fleet vehicles and the level of pay<sup>18</sup>.

According to the drivers themselves, **the lack of legal regulations regarding parking conditions and access to sanitation facilities** at unloading and loading sites, **as previously indicated, is also a significant problem.**

In order to identify the needs of drivers, the Truckers Life Foundation produced a video in which professional drivers were asked for their opinions on the problems they face in their daily work<sup>19</sup>. The drivers' opinions indicate that their needs relate to the most basic issues that are not ensured, such as being treated with dignity and being able to use sanitation facilities and a place to spend time while parking for unloading and loading. According to the driver participating in the created material, "the most important thing - access to sanitation facilities and the second thing is to have somewhere to park".

## **Drivers' needs in terms of sanitation and parking - survey results**

In order to find out the current and real needs of professional drivers using logistics centres in Poland, a survey was conducted for the purposes of this report. Drivers were asked to complete a questionnaire in which they could indicate the most important needs and shortcomings in terms of sanitation and parking, also assessing the solutions applied to date.

A total of **566 questionnaires** were completed - 536 in Polish, 14 in Ukrainian, 14 in Russian and 2 in German. Drivers were free to choose the location for assessment - a total of **499**

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<sup>17</sup> Rynek pracy kierowców w Polsce, PWC i Związek Pracodawców Transport i Logistyka Polska, p. 34-37.

<sup>18</sup> Rynek pracy kierowców w Polsce, PWC i Związek Pracodawców Transport i Logistyka Polska, p. 34-37.

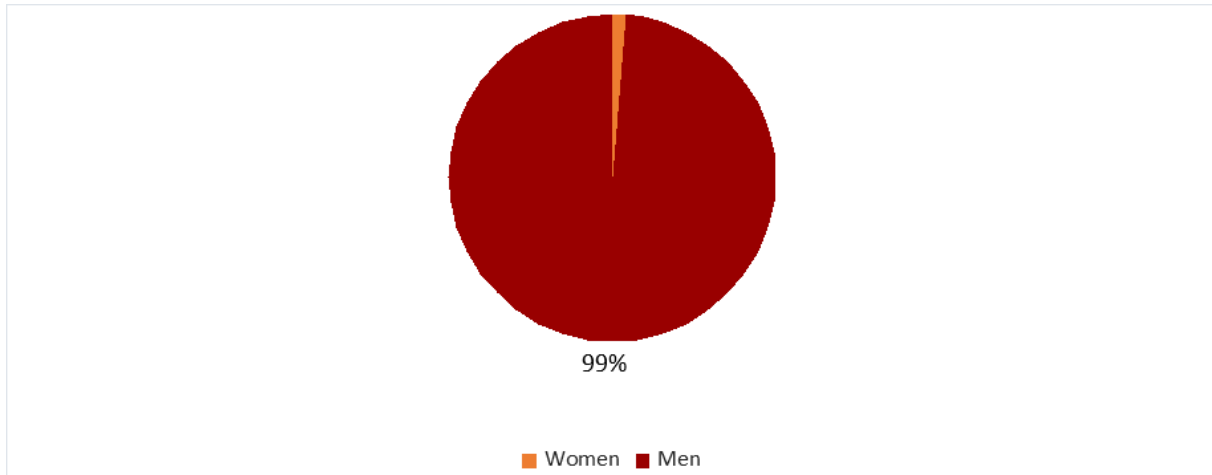
<sup>19</sup> Rynek pracy kierowców w Polsce, PWC i Związek Pracodawców Transport i Logistyka Polska, p. 34-37.

**logistics centres in Europe** were assessed as part of the survey. The vast majority of locations assessed were in Poland, whereas among the European logistics bases, logistics bases in Germany, the Netherlands, France and Spain were assessed. Respondents were free to choose the location to be assessed; however, as a significant proportion of the surveyed drivers did not indicate the full names of the logistics centres and production bases, it is not possible to accurately aggregate the data geographically by location.

### Metrics

The survey was mostly completed by men (98.7%), with women accounting for 1.3% of respondents.

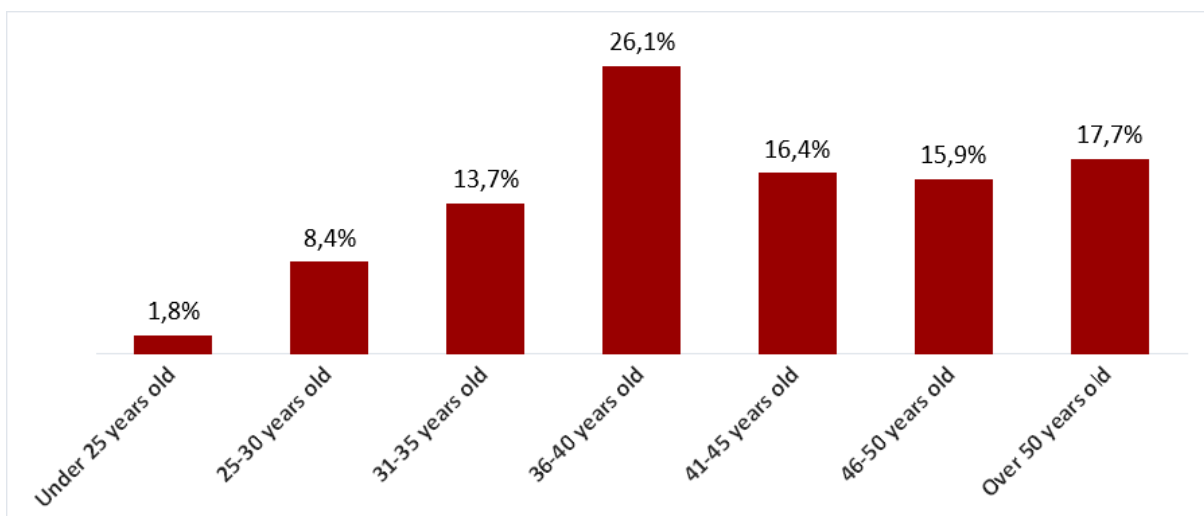
**Chart 1. Gender of survey respondents**



Source: Results of PAPI survey with professional drivers (N=566).

Professional drivers are an ageing occupational group, which was also reflected in the age structure of the survey participants. The highest percentage of respondents fell into the 36 to 40 age group, but it is important to note a general upward trend in the number of respondents as age increases in subsequent response groups. Persons under 30 years old accounted for merely 10.2% of all survey participants.

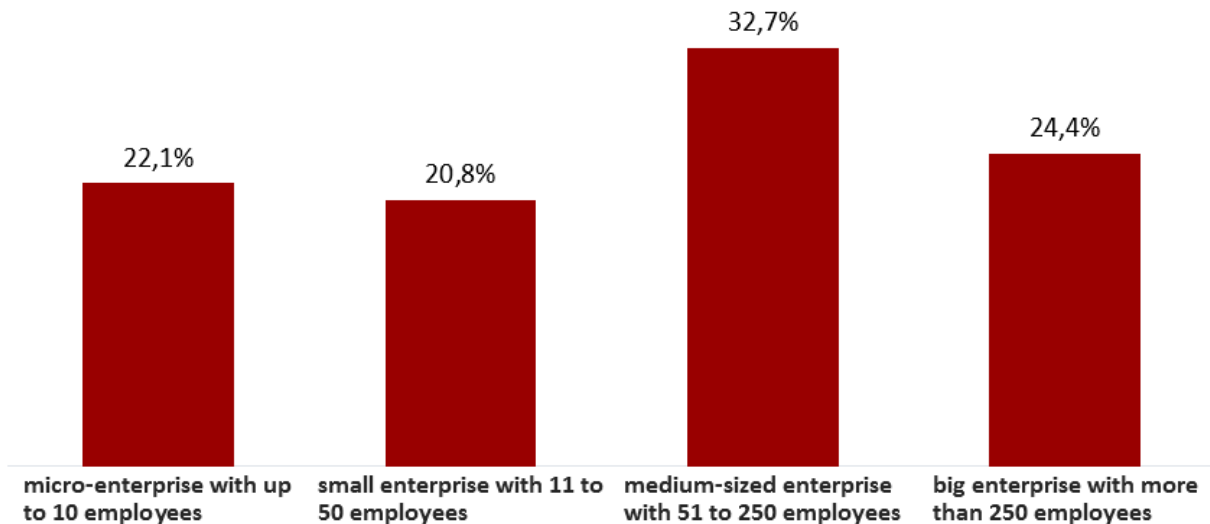
**Chart 2. Age of survey respondents**



Source: Results of PAPI survey with professional drivers (N=566).

There were no particular differences in the employment structure of survey participants, with a slightly higher proportion of respondents (32.7%) employed in medium-sized enterprises.

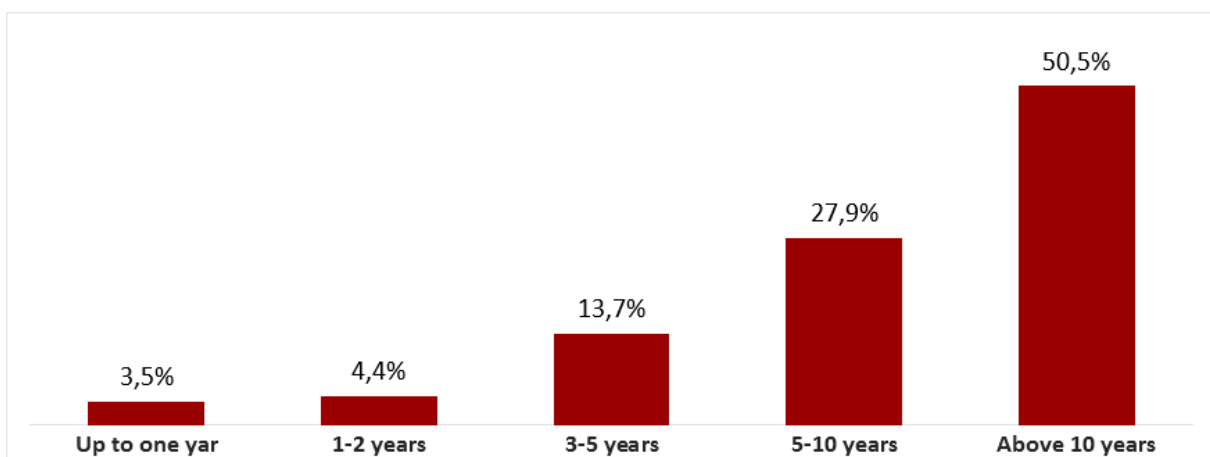
**Chart 3. Size of the enterprise where the respondent is employed**



*Source: Results of PAPI survey with professional drivers (N=566).*

The considerable experience and familiarity with the problems of professional drivers at the point of unloading and loading is evidenced by the high seniority of the vast majority of survey respondents - more than half of the drivers completing the questionnaires had more than ten years of experience in the profession (50.4%). The second highest percentage of indications belonged to the group of drivers with between 5 and 10 years of experience (27.9%).

**Chart 4. Seniority of survey respondents**

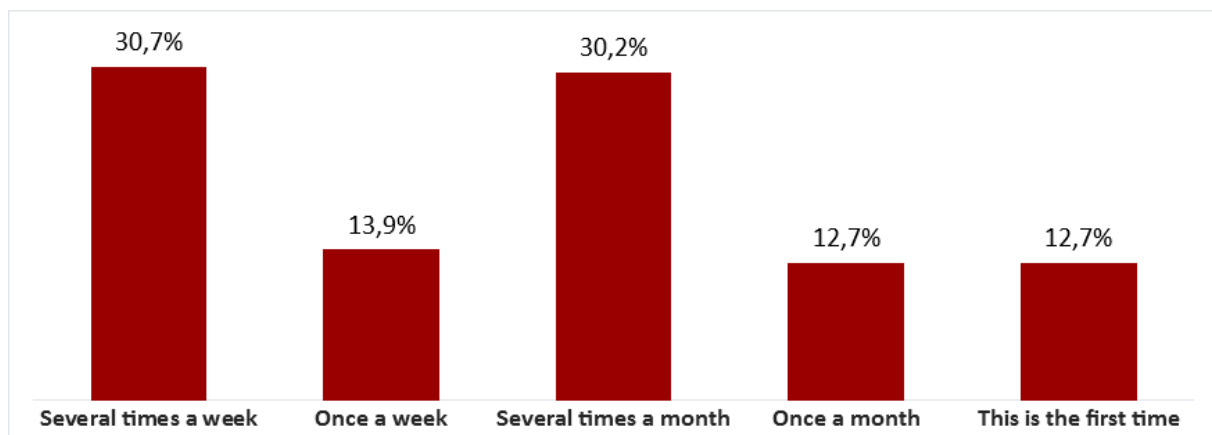


Source: Results of PAPI survey with professional drivers (N=566).

o **Assessment of drivers' needs**

The drivers who took part in the survey relatively often work at the location they assessed, so **problems with sanitation facilities or unsatisfactory loading or unloading conditions can be particularly troublesome**. The highest percentage of survey participants indicated that drivers work at the evaluated site even several times a week (30.7%) and several times a month (30.2%).

**Chart 5. How often do you have loading/unloading at the assessed location?**



Source: Results of PAPI survey with professional drivers (N=566).

The drivers surveyed rated the time as definitely the worst in the context of satisfaction with the quality of service in logistics centres, with as many as 56.3% of respondents expressing dissatisfaction (total number of "rather not" and "definitely not" answers).

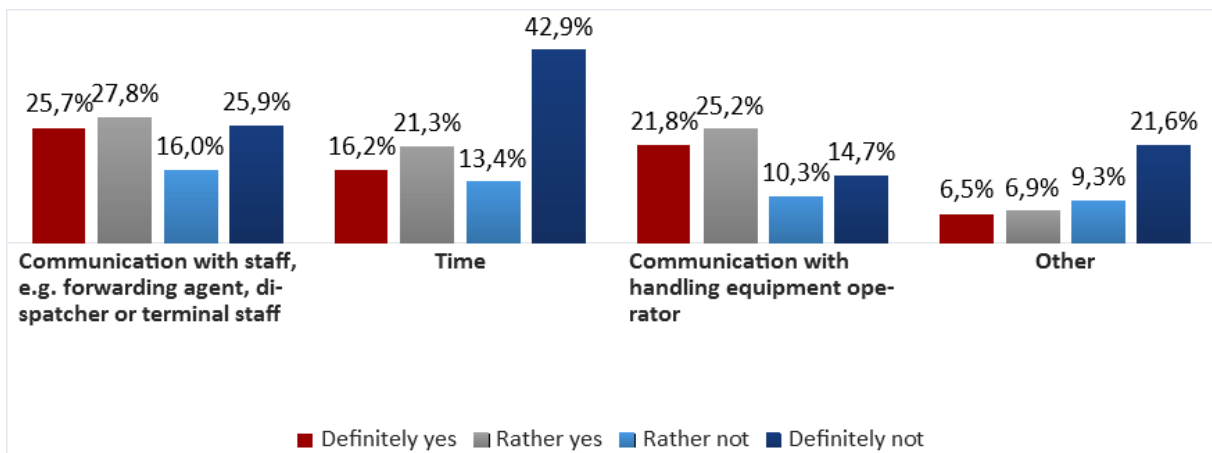
**Drivers most frequently indicated the following problems as the most bothersome:**

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- Failure to meet loading/unloading time arrangements due to insufficient staffing,
  - Long waiting period even before entering the unloading/loading area,

- Long, delayed notifications,
  - Extended waiting time for documents after loading/unloading,
  - Long time spent looking for a parking space,
  - Waiting time for loading of up to several dozen of hours,
  - Failure to respect scheduled loading/unloading times and service according to queue,
  - Inadequate pace of staff responses.
  - Communication with the handling equipment operator was not a frequently mentioned problem and the drivers surveyed tended to rate it positively, but opinions were divided when it came to assessing communication with staff. 53.5% of the drivers participating in the survey gave positive ratings, while 41.9% gave negative ones. Among the most frequently indicated problems in communication with staff, the following issues should be noted:
    - Lack of adequate communication of information, the need to obtain it from other drivers,
    - Unprofessional service,
    - Unpleasant behaviour, rudeness, arrogance towards drivers,
    - Staff tardiness,
    - Lack of possibility to communicate with staff in English or by other means (e.g. gestures) than the native language of the country in which the assessed logistics centre is located,
    - Lack of contact with decision-makers,
    - No information available on the reason for delays.
- 

Drivers responding to the question in the 'other' category also frequently indicated the burdensome **problem of a lack of adequate number of parking spaces and sanitation facilities**, which is a particularly significant problem in the context of long waiting times for unloading/loading, highlighted by a significant proportion of survey respondents.

**Chart 6. Are you satisfied with the quality of service at the place you are assessing? (the chart omits the responses "it doesn't matter to me" and "it's hard to say")**



Source: Results of PAPI survey with professional drivers (N=566).

The evaluation of the aspects indicated above was analysed in the context of the seniority of the drivers evaluating them. No particular correlations were identified between satisfaction and seniority, reflecting the fact that shortcomings are being identified by drivers regardless of the number of years in the profession. However, those with low seniority (one to two years) did not rate communication with staff negatively.

**Table 1. Are you satisfied with the quality of service at the place you are assessing?**

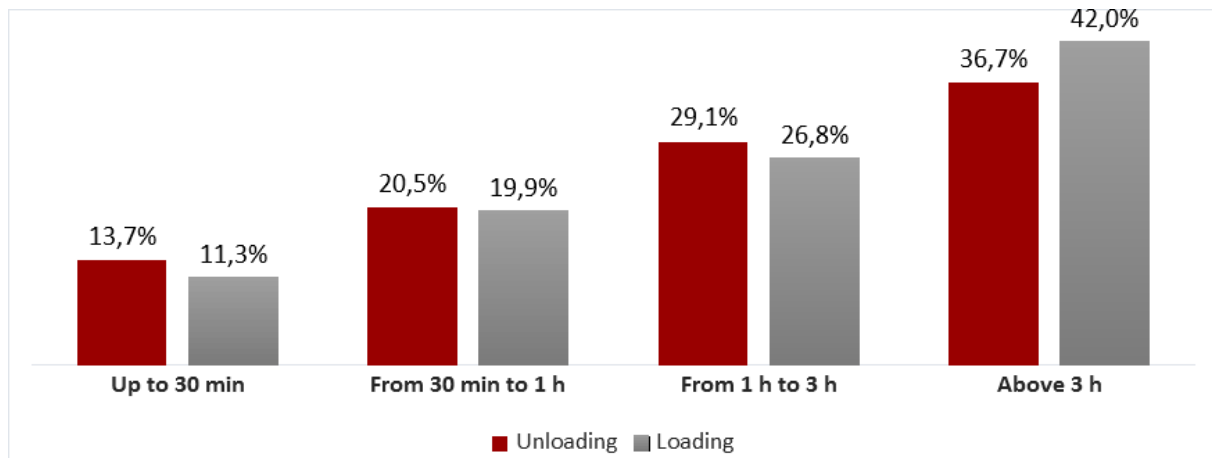
	Drivers' seniority				
	Up to one year	1-2 years	3-5 years	5-10 years	Over 10 years
<b>Communication with staff, e.g. forwarding agent, dispatcher or terminal staff</b>					
<b>Definitely yes</b>	37.5%	40.0%	35.7%	30.9%	35.7%
<b>Rather yes</b>	25.0%	40.0%	42.9%	18.2%	35.7%
<b>Rather no</b>	12.5%	0.0%	7.1%	21.8%	8.9%
<b>Definitely no</b>	25.0%	0.0%	10.7%	29.1%	17.0%
<b>Communication with handling equipment operator</b>					
<b>Definitely yes</b>	37.5%	10.0%	16.1%	30.2%	24.6%
<b>Rather yes</b>	12.5%	30.0%	32.3%	19.0%	18.4%
<b>Rather no</b>	0.0%	10.0%	0.0%	9.5%	3.5%
<b>Definitely no</b>	12.5%	0.0%	6.5%	7.9%	8.8%
<b>Time</b>					
<b>Definitely yes</b>	25.0%	10.0%	29.0%	23.8%	21.1%
<b>Rather yes</b>	12.5%	50.0%	19.4%	27.0%	24.6%
<b>Rather no</b>	25.0%	30.0%	9.7%	4.8%	14.0%
<b>Definitely no</b>	37.5%	10.0%	32.3%	44.4%	30.7%

Source: Results of PAPI survey with professional drivers (N=566).



Drivers spend a considerable amount of time in logistics centres, as evidenced by the fact that both loading and unloading take a long time - the highest percentage of respondents indicated that these activities take more than three hours. In the course of the survey, respondents indicated that this time even reaches several dozen of hours.

**Chart 7. How long did your last loading/unloading take?**



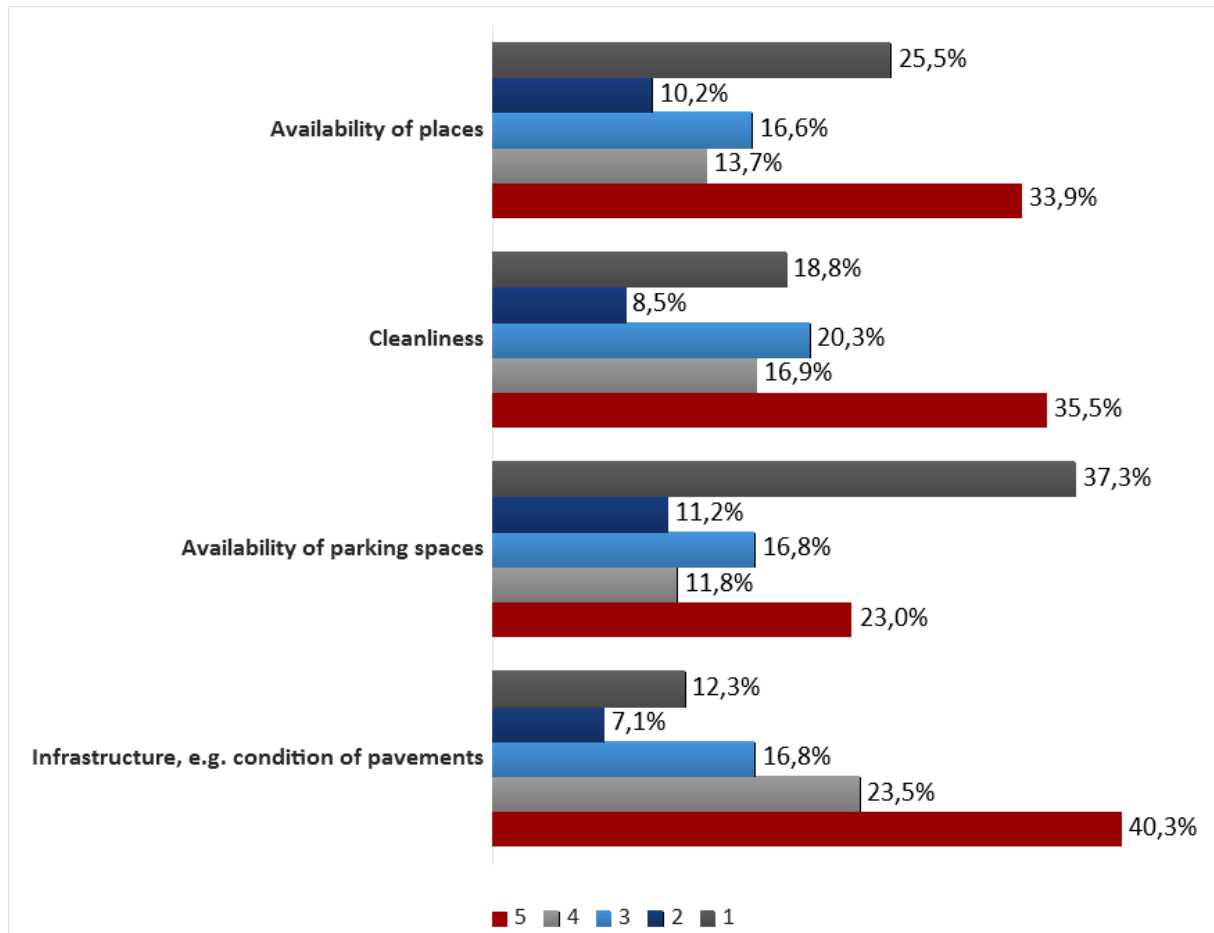
Source: Results of PAPI survey with professional drivers (N=566).

The infrastructure (including e.g. the condition of the pavement) and cleanliness in the logistics centres assessed by the drivers surveyed were generally not a problem, and drivers rated these aspects mostly positively. The availability of space was rated lower (35.7% of the lowest ratings of 1 and 2) and, above all, the availability of parking spaces, which was frequently mentioned during the survey - their insufficient number was pointed out by a majority of respondents, with 48.5% of respondents giving this aspect the lowest possible ratings (1 and 2).

**Particular attention should be paid to the problems that constitute a barrier for a majority of the drivers surveyed:**

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- The manoeuvring area is in some places insufficient for the safe execution of the ramp approach/departure manoeuvres,
  - Stacked empty bins/pallets obstructing passage,
  - The inability to enter resulting in the need to wait in the street, thus blocking the road for other road users. Drivers added that on more than one occasion they have been fined for having to wait in an unauthorised place,
  - Lack of warehouse space,
  - Parking spaces exclusively for the vehicle fleet of the respective logistics centre,
  - Lack of rest and refreshment facilities as well as sanitation facilities for drivers
  - Very long waiting times before being able to enter the car park,
  - No parking despite available spaces,
  - Parking available only for a short period of time, while the organisation of work at the logistics centre extends loading/unloading to many hours.
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Chart 8. How would you rate the place in general? Please rate it on a scale of 1-5, where 1 is the lowest rating and 5 is the highest.



Source: Results of PAPI survey with professional drivers (N=566).

The table below shows the average ratings given to each aspect by drivers, bearing in mind their seniority and the different age groups of survey respondents. No significant correlations were identified, with the youngest drivers (age groups up to 30 years old) rating cleanliness the lowest of all groups.

**Table 2. Are you satisfied with the quality of service at the place you are assessing? - average rating by seniority of survey respondents**

	Drivers' seniority					In general
	Up to one year	1-2 years	3-5 years	5-10 years	Over 10 years	
Availability of spaces	2.25	2.11	3.69	3.74	4.31	<b>4.09</b>
Cleanliness	2.00	2.68	3.34	3.86	3.86	<b>3.97</b>
Availability of parking spaces	2.00	1.95	3.10	2.95	3.69	<b>2.97</b>
Infrastructure, e.g. condition of pavement	2.00	2.95	3.93	4.02	4.24	<b>4.23</b>

Source: Results of PAPI survey with professional drivers (N=566).

**Table 3. Are you satisfied with the quality of service at the place you are assessing? - average rating by age groups of survey respondents**

Drivers' seniority								
	Less than 25 years	25-30 lat	31-35 years	36-40 years	41-45 years	46-50 years	Over 50 years	In general
Availability of spaces	2.25	2.11	3.69	3.74	4.31	4.09	3.78	<b>3.71</b>
Cleanliness	2.00	2.68	3.34	3.86	3.86	3.97	4.35	<b>3.76</b>
Availability of parking spaces	2.00	1.95	3.10	2.95	3.69	2.97	2.21	<b>2.86</b>
Infrastructure, e.g. condition of pavement	2.00	2.95	3.93	4.02	4.24	4.23	4.14	<b>3.97</b>

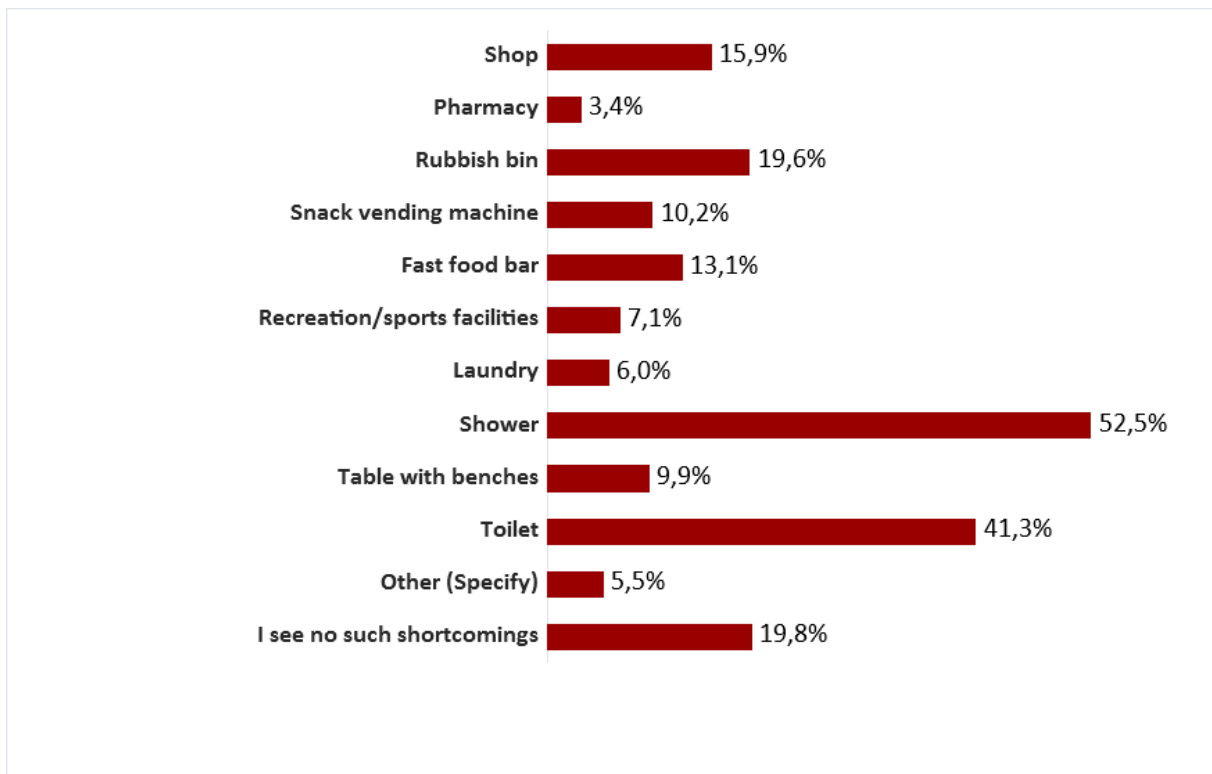
Source: Results of PAPI survey with professional drivers (N=566).

The lack of sanitation facilities at a logistics centre is a frequently mentioned problem among the drivers participating in the survey. **52.5% of survey respondents indicated that these locations lacked showers and 41.3% - toilets.** The lack of even the most basic sanitation facilities is a particularly difficult situation in the context of many hours of loading or unloading, which was mentioned very often by drivers during the survey.

When asked about facilities that were not available, **drivers indicated the most basic needs** instead of elements that could improve the conditions in the assessed places, which makes it possible to conclude that the centres are insufficiently prepared. In addition to the lack of showers and toilets, a significant percentage of respondents also indicated the lack of rubbish bins (19.6%), a shop with basic items (15.9%) and a fast food bar (13.1%).

As other missing elements, drivers emphasised again how important it is to provide parking spaces and efficient sanitation facilities that drivers would be allowed to use freely, however, also pointing out correct signposting in car parks, greater commitment on the part of the staff of the locations assessed, better manners of staff towards drivers and better treatment. Attention was also drawn to the issue of the risk to health and life when rooms or shaded areas are not provided for drivers to wait in during the summer season. In such a situation, drivers are forced to stay for hours in a sunny cockpit in the heat.

Chart 9. What facilities do you think are missing at this location? (multiple choice question)

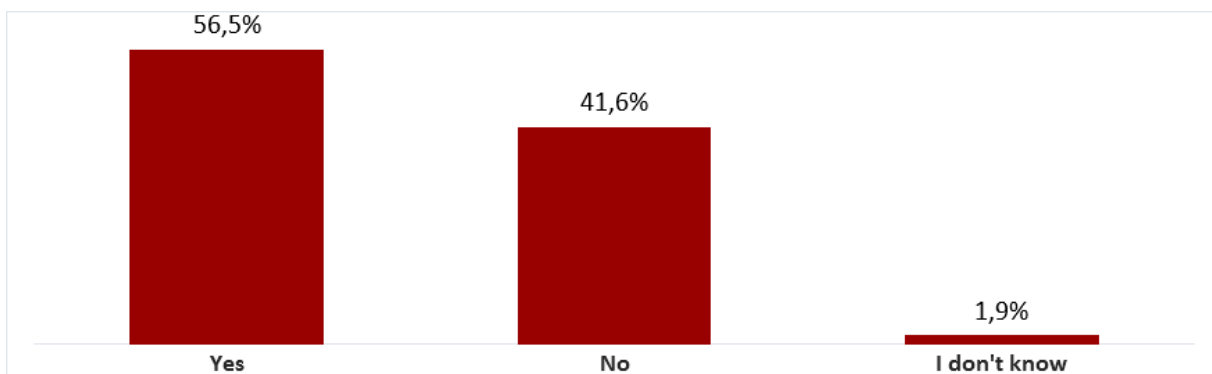


Source: Results of PAPI survey with professional drivers (N=566).

o Assessment of sanitation facilities

According to the survey, almost one in two places assessed by drivers does not have access to toilets - 56.5% of respondents marked the "yes" answer, while 41.6% marked the "no" answer.

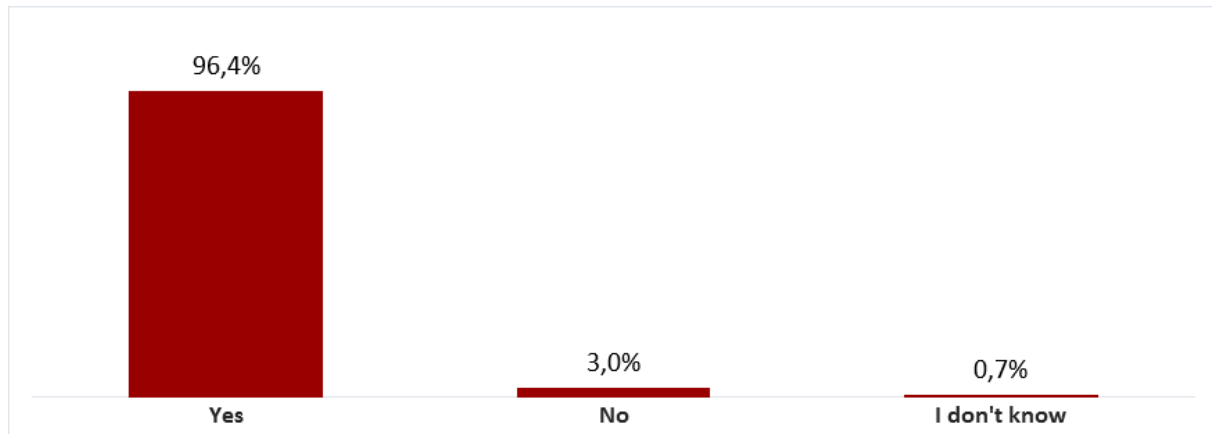
Chart 10. Is there a toilet available in the car park?



Source: Results of PAPI survey with professional drivers (N=566).

Drivers rating sites with toilet access were asked to further assess their quality. 96.4% of drivers confirming access to sanitation facilities in the previous question added that the toilets were operational and accessible.

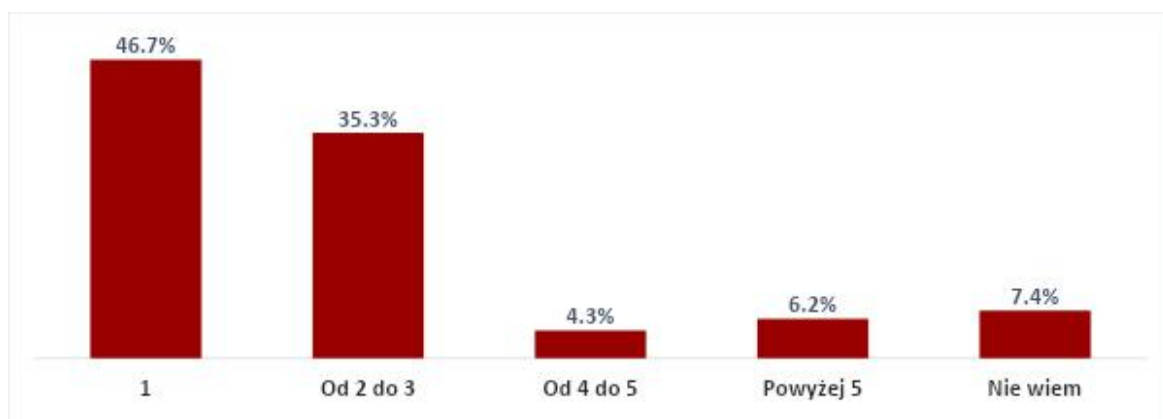
**Chart 11. Is the toilet accessible/open?**



Source: Results of PAPI survey with professional drivers (N=566).

Usually, **only one toilet was available** (46.7%), which is in line with drivers' indications of not having enough toilets for their needs, especially in large logistics centres. 35.3% of the locations assessed had between two and three toilets, with a small percentage of respondents indicating a higher number.

**Chart 12. How many toilets are available?**

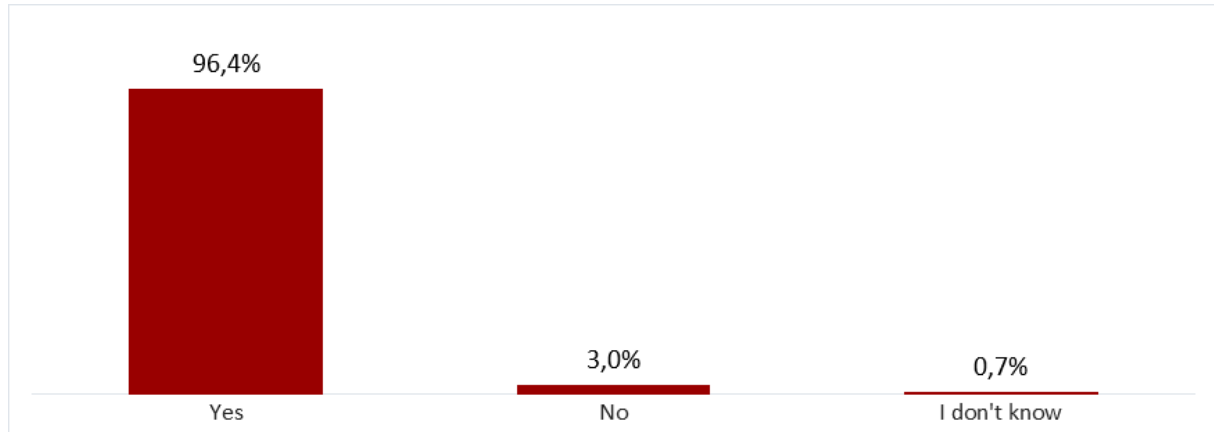


Source: Results of PAPI survey with professional drivers (N=566).



96.4% of the available toilets met the requirements to provide separate facilities for men and women.

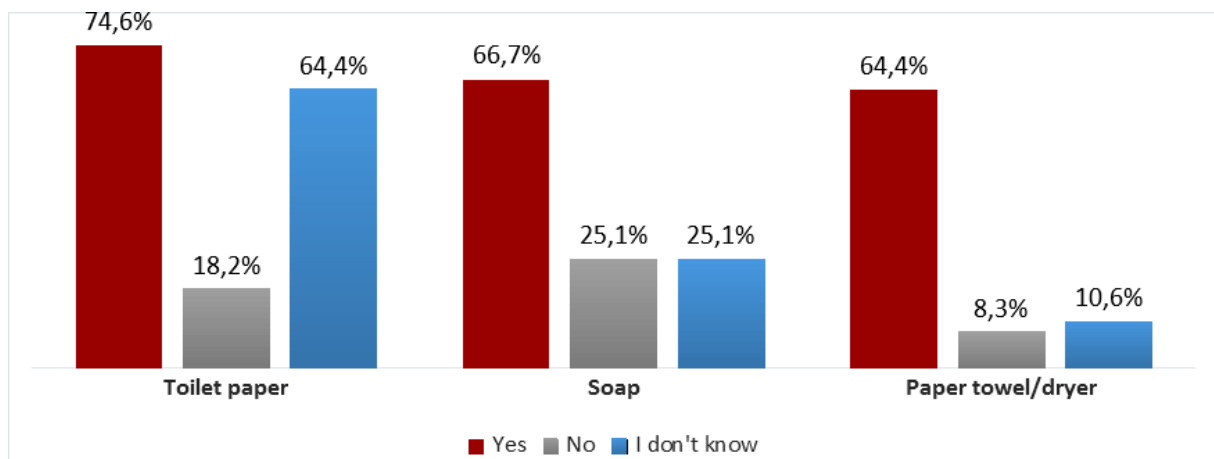
**Chart 13. Are there separate toilets for men and women?**



Source: Results of PAPI survey with professional drivers (N=566).

The vast majority of respondents did not perceive a problem in terms of equipping the available toilets with essential hygiene products, such as toilet paper, soap and paper towels or hand dryers; however, ¼ of drivers indicated a lack of soap.

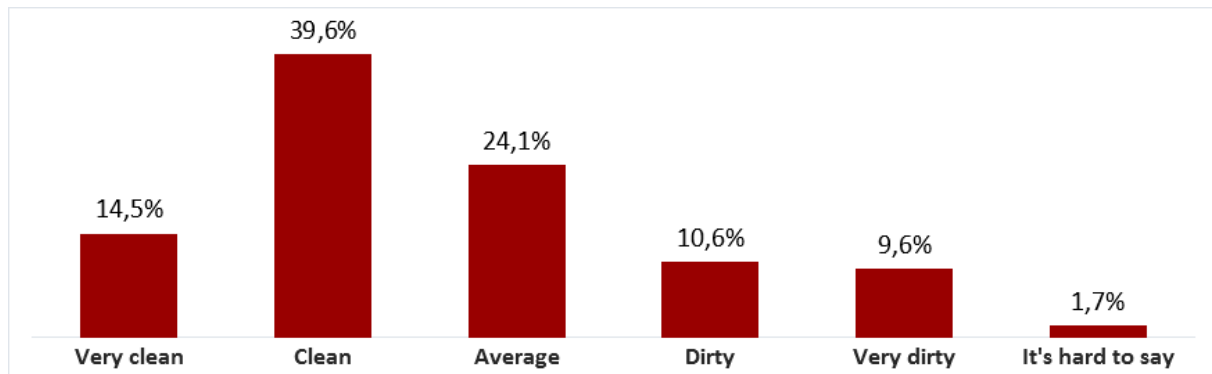
**Chart 14. Are all the necessary hygiene items in the toilet?**



Source: Results of PAPI survey with professional drivers (N=566).

The available toilets were mostly rated as very clean and clean (a total of 54.1% of responses), although almost ¼ of respondents rated them average (24.1%). 20.2% of the assessed locations did not provide clean sanitation facilities, meaning that the sanitation facilities were dirty or very dirty.

**Chart 15. How would you rate the cleanliness of the toilets?**

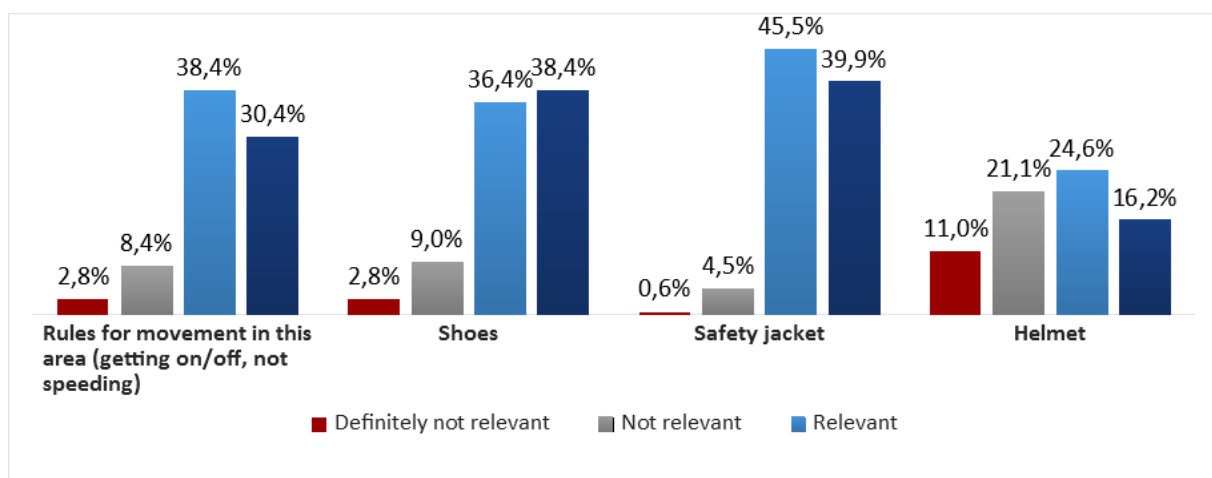


Source: Results of PAPI survey with professional drivers (N=566).

**o Assessment of safety level**

Drivers were asked about the most important occupational health and safety rules that should be observed during unloading/loading. For each rule assessed (wearing a helmet, safety jacket, protective shoes and rules for proper movement), most of the drivers answered "very important" and "important".

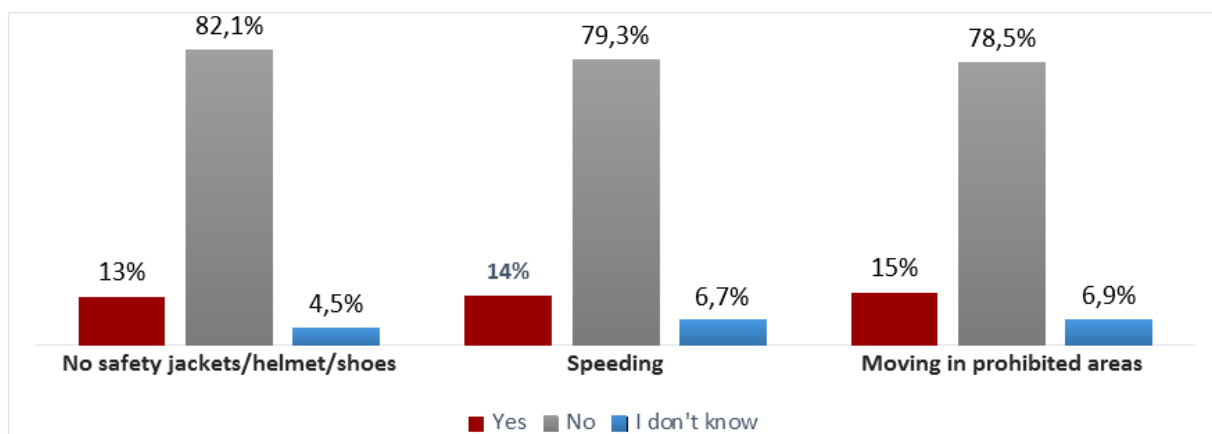
**Chart 16. Which of the occupational health and safety rules on unloading/loading are important/relevant to you?**



Source: Results of PAPI survey with professional drivers (N=566).

Drivers reported no particular need for safety improvements at loading and unloading sites. 82.1% of survey respondents marked the answer "no" for lack of safety jackets, helmets and shoes, 79.3% for speeding, and 78.5% for moving in prohibited areas. A small percentage of those who confirmed problems with safety compliance added that they mostly did not see any additional measures taken by owners to improve safety at the assessed location.

**Chart 17. Have you noticed any safety issues at this location?**



Source: Results of PAPI survey with professional drivers (N=566).

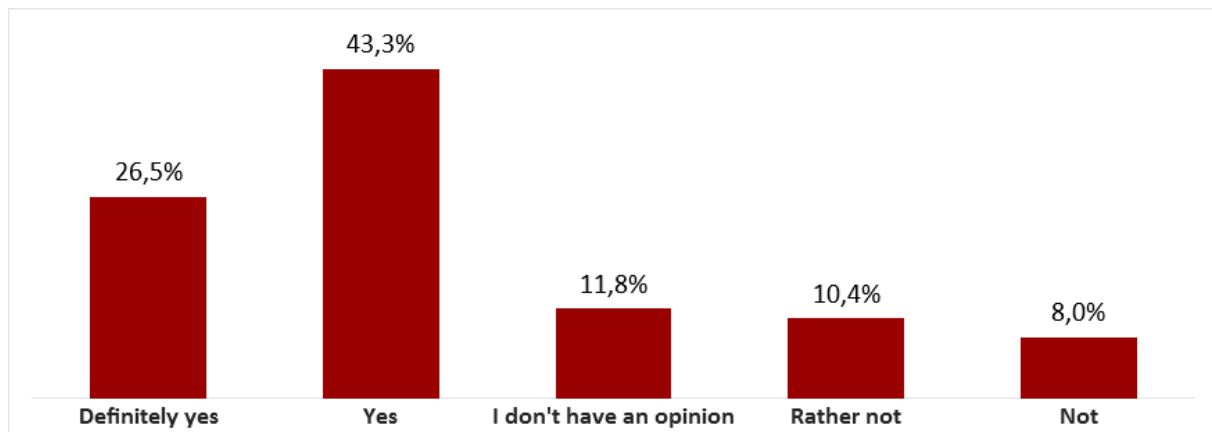
A total of 69.8% of the drivers surveyed rated the signposting at the logistics centres positively (total of "definitely yes" and "yes" answers), with 18.4% of the respondents taking the opposite view, who also pointed this out when asked about identified needs.

**The problems with signposting indicated by drivers primarily include:**

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- illegible, obliterated horizontal markings (lines),
  - insufficient signposting of entrance gates and authorised parking spaces in the case of car parks for company vehicles in a logistics centre,
  - lack of knowledge and willingness to help on the part of the staff of some of the locations assessed,

- conflicting instructions given by the staff,
  - lack of height markings,
  - possibility to enter only in the back, directly from the public road,
  - difficulties in finding the right sector, field, track,
  - maps difficult to read,
  - poor quality of signs (including, but not limited to, dirty, obliterated signs).
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**Chart 18. In your opinion, are the signs at this location (entrance, exit, sectors) well marked?**



Source: Results of PAPI survey with professional drivers (N=566).

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*SUMMARY - drivers' needs*

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According to the responses of the almost six hundred drivers surveyed, loading and unloading at logistics bases is a lengthy process, often subject to delays and postponements, often requiring drivers to spend dozens of hours in one place - hence the importance of striving for at least minimum working conditions, which should not be seen as a convenience, but rather as necessary basics. In addition to extended service times, survey respondents also pointed to poor treatment of drivers, lack of assistance and having to cope on their own. The most frequently mentioned problems, however, were the insufficient number of parking spaces and the lack of access to sanitation facilities at logistics bases. Despite the shortcomings noted, it should be pointed out that the logistics centres surveyed were safe workplaces where occupational health and safety rules were observed.

## On the way to change

Measures are already being taken to ensure proper working conditions for drivers and to introduce legal regulations in this regard, both in Poland and in other European countries. The Federal Association of Freight Transport, Logistics and Waste Disposal (BGL) has criticised the treatment of drivers at loading ramps in Germany, calling it "unacceptable and inhumane"<sup>20</sup>. Therefore, the association has raised the debate on the need to change the law to provide a binding guarantee of access to sanitation as well as rest and refreshment facilities for all lorry drivers at loading and unloading points. To this end, steps have been taken to amend the Ordinance on Workplaces, which stipulates that the provisions on sanitation and rest and refreshment facilities also cover (shared) use by external personnel<sup>21</sup>.

A similar situation occurred in Spain in September 2022, with the carriers' association Plataforma Nacional Defensa Sector del Transporte calling on transport workers to boycott the port of Algeciras, Spain, due to the port managers' rejection of proposals to talk about improving drivers' work quality<sup>22</sup>. The aim of the protest was to ensure better waiting conditions and respectful treatment of drivers. The demand was also to prepare a safe infrastructure for both drivers and their lorries.

Similar activities are also being undertaken in Poland, with the aim of starting a debate on the fundamental rights of professional drivers. Projects in this area are primarily carried out by the employers' association Transport and Logistics Poland (Transport i Logistyka Polska) and the Polish Road Transport Institute (Polski Instytut Transportu Drogowego) together with organisations operating in Poland and abroad. In November 2022, the conference "Road Transport Today and Challenges of the Future" was held, organised by the Polish Press Agency (PAP) in substantive cooperation with the employers' association Transport and Logistics Poland. The main themes of the conference were road transport in the face of geopolitical change, the remodelling of supply chains, the labour market for drivers in Poland, the digitisation of road transport and the industry's readiness to meet the challenges of decarbonisation<sup>23</sup>.

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<sup>20</sup> <https://trans.info/pl/traktowanie-kierowcow-na-rampach-w-niemczech-302849> [Accessed: 5.12.2022].

<sup>21</sup> Ibidem.

<sup>22</sup> Ibidem.

<sup>23</sup> Ibidem.

## o Legal status analysis

The legal regulations, which do not sufficiently and consistently define the rules for the work of professional drivers at places of unloading and loading of goods, also need to be changed. The institutions that should have competence in this area are the Ministry of Road Transport and the Maritime Economy, the Ministry of Labour, Municipal and Road Transport, the Trade Union Forum, the Road Transport Inspection, the Main Labour Inspectorate. **Work in road transport is regulated by European Union and national legislation as well as European agreements.** EU regulations apply to heavy goods vehicles over 3.5 tonnes and professional drivers must comply with them in all EU countries, as well as Switzerland, Liechtenstein, Norway and Iceland. Outside this area, in most European countries and some Central Asian countries, drivers must comply with the rules of the European Agreement Concerning the Work of Crews of Vehicles Engaged in International Road Transport (AETR), adapted to the EU regulations<sup>24</sup>.

Road transport drivers are obliged to comply with certain EU rules on **driving times, rest periods and their recording**. The rules must be complied with in long-distance transport or for domestic and international deliveries, regardless of which country the vehicle is registered in and regardless of whether the work is carried out on a self-employed basis or for a transport company.

The main legal acts regulating the working conditions for professional drivers in the aforementioned area are as follows:

- Regulation (EC) No. 561/2006 of the European Parliament and of the Council of 15 March 2006 on the harmonisation of certain social legislation relating to road transport and amending Council Regulations (EEC) No. 3821/85 and (EC) No. 2135/98 and repealing Council Regulation (EEC) No. 3820/85 (Text with EEA relevance)
- DIRECTIVE OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL (EU) 2015/413 facilitating cross-border exchange of information on road-safety-related traffic offences.
- Council Directive 2004/66/EC, of 26 April 2004 adapting Directives 1999/45/EC, 2002/83/EC, 2003/37/EC and 2003/59/EC of the European Parliament and of the

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<sup>24</sup> Ibidem.

Council and Council Directives 77/388/EEC, 91/414/EEC, 96/26/EEC, 2003/48/EC and 2003/49/EC, in the fields of free movement of goods, freedom to provide services, agriculture, transport policy and taxation, by reason of the accession of the Czech Republic, Estonia, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Slovenia and Slovakia.

- Regulation (EU) No. 165/2014 on tachographs in road transport, repealing Council Regulation (EEC) No. 3821/85 on recording equipment in road transport and amending Regulation (EC) No. 561/2006 of the European Parliament and the Council on the harmonisation of certain social legislation relating to road transport
- DIRECTIVE 2002/15/EC OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 March 2002 on the organisation of the working time of persons performing mobile road transport activities.
- Directive 2006/22/EC of the European Parliament and of the Council of 15 March 2006 on minimum conditions for the implementation of Council Regulations (EEC) No. 3820/85 and (EEC) No. 3821/85 concerning social legislation relating to road transport activities and repealing Council Directive 88/599/EEC (Text with EEA relevance) - Declarations.
- Act of 16 April 2004 on Drivers' Working Time
- Act of 26 June 1974 Labour Code.

A significant change for Polish transport was introduced by the adoption of the Mobility Package by the European Commission. The Mobility Package I was designed to be an initiative aimed at amending and extending EU regulations in the field of road transport by pursuing safety, social justice, sustainable development and the achievement of economic objectives<sup>25</sup>. The legal acts constituting the Mobility Package 1 defining changes in the rules of conducting business activity in the transport sector in Poland are implemented primarily through amendments to the Act of 6 September 2001 on Road Transport and the Act of 16 April 2004 on Drivers' Working Time<sup>26</sup>.

The significant changes introduced by Mobility Package 1 are primarily as follows:

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<sup>25</sup> Ibidem.

<sup>26</sup> Ibidem.



- regulations on drivers' rest and working time. The changes introduced concern the obligation to allow drivers to return to their place of residence or company base for at least 45 hours once every four weeks (in the case of shortened weekly rest periods, such a return must take place once every three weeks), the obligation for drivers to take regular weekly rest periods away from the vehicle cockpit, and the possibility of extending driving time to a maximum of two hours when returning to base (provided that this exception is documented and justified).
- changes to drivers' salaries engaged in international transport, concerning the payment of the minimum wage applicable in the country in which the drivers perform their work.
- an obligation for drivers of vehicles engaged in international transport to return to the base of the country where the carrier has its registered office once every eight weeks, a ban on carrying out more than three cabotage operations within seven days and an obligation to take a break of four days from the end of the last cabotage operation<sup>27</sup>.

According to the report entitled "Mobility Package I - Impact on the European Road Transport System", drivers' rest in hotels and similar facilities is difficult to implement, and full enforcement of the rules on rest outside the cockpit from the perspective of companies will not be feasible for many years due to the lack of suitable facilities<sup>28</sup>. Another issue of concern is the compulsory return of drivers and vehicles to base at four-week intervals, involving a significant increase in costs, loss of productivity and additional environmental burdens<sup>29</sup>.

The above-mentioned legal acts regulate the working conditions of professional drivers with regard to, inter alia, permitted driving time, required rest time, status or minimum remuneration. In the Polish legal environment, an important act in the context of regulating the work of heavy goods vehicle drivers is also the Act of 20 June 1997 - the Law on Road Traffic (Journal of Laws (Dz.U.) 2012, item 1137, as amended). The Act contains provisions on the safe use of roads, the technical condition of vehicles, the acquisition of qualifications and examinations. The Ordinance of the Minister of Labour and Social Policy of 14 March 2000 on

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<sup>27</sup> Ibidem.

<sup>28</sup> Ibidem.

<sup>29</sup> Ibidem.

Occupational Health and Safety in Manual Transport Work is, on the other hand, relevant to unloading and loading work, specifying, among other things, the methods of carrying goods. In the context of unloading and loading work, however, **there should be one regulation comprehensively setting out occupational health and safety rules for warehouse premises.** The types of goods, the way they are stored, as well as the size of the company and the organisation of work in warehouses mean that all the very different and specific risks must be taken into account when shaping occupational health and safety policies in warehouses. Equally important for ensuring occupational safety are the obligations to inform workers about the safe work rules applicable when storing goods. In order to ensure safe work in warehouses, it is necessary not only to implement the requirements relating to the general principles of safe storage of goods, but to take a holistic, comprehensive and coherent approach to safety problems, including technical issues and, above all, the proper organisation of work<sup>30</sup>.

Importantly, **none of the above-mentioned legislation includes provisions to protect and ensure safe working conditions for professional drivers at the place of loading and unloading of goods in logistics centres.** Despite the provisions on proper stopping and parking, parking spaces are not provided and made available to drivers, which means that they often have to park in an unauthorised or unsafe place.

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*"Security is selective in allowing lorries into the yard, with some vehicles having to wait on the local road with traffic."*

*"They issue notifications for a few hundred vehicles, they have a car park for 30-40 vehicles, the rest park on the road, blocking the street. The police give fines for parking in an unauthorised place."*

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*Source: Driver's opinion as part of the survey.*

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<sup>30</sup> Basic occupational health and safety rules in warehouses - legal status, [https://www.ciop.pl/CIOPPortalWAR/appmanager/ciop/pl?\\_nfpb=true&\\_pageLabel=P34800140991457100452543&html\\_tresc\\_root\\_id=10118&html\\_tresc\\_id=10300&html\\_klucz=10118&html\\_klucz\\_spis=](https://www.ciop.pl/CIOPPortalWAR/appmanager/ciop/pl?_nfpb=true&_pageLabel=P34800140991457100452543&html_tresc_root_id=10118&html_tresc_id=10300&html_klucz=10118&html_klucz_spis=) [accessed: 20.12.2022].

This is particularly problematic in the context of driver working time in a logistics centre, where, as confirmed in the completed survey, loading and unloading take more than a few hours, often exceeding 24 hours. Despite this, there are no legal regulations regarding the need for drivers to be able to park safely.

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*"Waiting for several to dozens of hours for unloading, no parking in front of the company, you have to stay on the roadside. No sign of where the toilet is, driver's time doesn't count for staff."*

*"Despite the notification for a given hour, waiting for loading often takes more than 24 hours."*

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*Source: Driver's opinion as part of the survey.*

Despite regulated working time, drivers indicate that a frequent problem is the failure of logistics centre staff to respect it. Drivers are forced to work during rest periods or after regular working hours. In addition, drivers are forced to unload and load, and employees at some of the locations assessed in the survey pass their professional duties onto the drivers. Their experience clearly indicates the need for regulation in this area, as their powers are often exceeded, thus indicating a lack of dialogue with employees at logistics bases.

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*"Forwarding agents pay no attention to established areas, the amount of work for drivers and their fatigue - loading and unloading with a manual pallet truck."*

*"Arrogance of the reception staff, dumping their responsibilities on the drivers."*

*"When I said that my working time was coming to an end I was told "it's your problem". You can't get along when it comes to unloading time, they tell you to drive up the ramp despite the pause."*

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Source: Driver's opinion as part of the survey.

Examples of action from outside the country indicate that the problem exists everywhere. Driver unions, which are in short supply in Poland, are pushing for regulation in this area. In 2020, a group of French unions representing lorry drivers, among others, threatened a transport paralysis in the country. The protest was intended as a response to the closure of roadside restaurants, bathrooms and toilets due to the outbreak of the coronavirus pandemic. As part of their demands, the unions asked for the opening of catering outlets along major roads, against which a nationwide protest was organised<sup>31</sup>. An example of the German trade unions' successful work on behalf of professional drivers is the German Trade Union Federation DGB Faire Mobilität (Polish: Uczciwa Mobilność (Fair Mobility)), which in 2021 took action and launched a campaign on lorry drivers and their poor working conditions. To this end, DGB Faire Mobilität met with around 50 lorry drivers from Poland, Ukraine, Belarus, Kyrgyzstan, Uzbekistan, Moldova, Romania and Bulgaria<sup>32</sup>. In 2017, the DGB also conducted between 50 and 60 events at motorway car parks, during which 3,000 drivers were interviewed. The German Trade Union Association (DGB) explained to foreign lorry drivers their rights by distributing leaflets to drivers about their rights in Germany<sup>33</sup>. Trade unions are an important form of protecting and ensuring the fundamental rights of workers and improving their working conditions. In Poland, they are regulated by the Act of 23 May 1991 on Trade Unions. Chapter 1 Art. 1. 1 of the Act defines a trade union as "a voluntary and self-governing organisation of working people, established to represent and defend their rights, professional and social interests."

### o Options for responding to problems

It should be noted that the problems most frequently indicated by drivers participating in the survey concerned **insufficient infrastructure and the lack of systemic solutions in this area**. The most common problem is the lack of access to sanitation facilities, which is particularly important given the long time that drivers are forced to spend at loading and unloading

<sup>31</sup> <https://40ton.net/protest-kierowcow-ciezarowek-przez-zamkniete-restauracje-i-toalety-grozba-z-francji/> [accessed: 20.12.2022].

<sup>32</sup> <https://trans.info/pl/warunki-pracy-kierowcow-uragaja-standardom-pokazuja-zwiazkowcy-236499> [accessed: 20.12.2022].

<sup>33</sup> <https://www.punkt.media/pl/aktualnosci/gospodarka/8932-kierowcy-ciezarowek-nie-znaja-swoich-praw-w-nie-mczech> [accessed: 20.12.2022].

points. The availability of toilets in logistics centres for transport workers is not regulated by law, and the problem is exacerbated by the difficulty of finding a solution for the maintenance of common areas in warehouse centres and the issue of financing them. Drivers often use the toilets of companies for which unloading or loading is carried out; however, it was emphasised that this is not always possible. Sometimes this was a result of a lack of goodwill towards the drivers, and sometimes it was due to the actual impossibility of making private rooms available to people not employed by the company. This situation was further exacerbated by the SARS-CoV2 virus pandemic, forcing strict compliance with sanitary regulations.

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*"There's always some kind of resentment towards a driver, he parked in the wrong space, when you go to ask about the toilet they smile and tell you to pee your pants. To a large extent a toilet isn't even there."*

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*Source: Driver's opinion as part of the survey.*

The provision of sanitation facilities can be a concern for companies due to the cost and space involved, but prefabricated facilities are becoming more common in many European countries and are a good practice worth replicating. This trend is particularly noticeable in the industry of modular toilets installed in urban public spaces, particularly in parks, squares and centres of large cities. In terms of functionality, the buildings do not deviate at all from the generally accepted standards. They meet all safety standards and are also compliant with occupational health and safety and fire regulations. This type of building is distinguished by its high standard of workmanship and is equipped with all the necessary installations. It should also be mentioned that the toilets prepared in this way are suitable for use for many years. Modular toilets are a modern, cost-effective solution. The elements are characterised by high parameters and their production is repeatable. Furthermore, choosing prefabricated facilities is a way of reducing operating costs. An example possible for implementation is the product of Hamster Polska Sp. z o.o. - the company produced, among other things, modular toilets for public transport drivers in Bielsko-Biała, where drivers spend time between their routes. The buildings are air-conditioned, equipped with a separate food preparation area and toilet facilities. What is important for this type of solution is that the toilets can be easily

configured, e.g. adding shower rooms for the drivers or creating a separate room for several drivers, where they can prepare their meals in comfort and wait for information from the logistician about loading or unloading. The toilets are a separate building in a separate parking zone, so drivers can use them 24 hours a day, which is particularly important for drivers carrying out loading or unloading at night, when access to the toilets in logistics centres is difficult or impossible. The solution is suitable for use by people with disabilities, meeting accessibility standards.

The following photographs show an example of a modular toilet that can be used in logistics centres<sup>34</sup>.



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<sup>34</sup> Photographs courtesy of Hamster Polska Sp. z o.o.



As mentioned above, existing locations have problems with the allocation of additional space that could be used to create a toilet accessible to drivers. An effective solution to the barriers encountered in accessing toilets is to shift the burden of finding usable space to other locations, such as car parks created within the economic zones. This also applies to other rest and refreshment rooms and secure parking spaces, the lack of which was acutely experienced by the survey respondents.

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*"There was a car park nearby for a few lorries but probably only for those waiting to unload, load. Generally, in the area there is no parking as such strictly for resting after work. As it is in an industrial area, you park wherever you like, without toilets or other facilities."*

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*Source: Driver's opinion as part of the survey.*

Despite the lack of legal regulations in this area, positive developments are taking place, an example of which is the car park for lorries built by The Coca-Cola Company and the PKS car park in Katowice. The company Przedsiębiorstwo Przewozu Towarów Powszechnej Komunikacji Samochodowej Spółka Akcyjna with its registered office in Katowice (PKS S.A.

Katowice) operates a 24-hour guarded car park with an area of 14,375.00 sq.m for lorries, where parking is provided on a daily and subscription basis. Rest and refreshment and sanitation facilities are provided within the car park. What is particularly important is that the car park is located in a well-accessible place close to major investments and economic zones, and there are a number of businesses in the vicinity offering vehicle repair and diagnostic services for lorries, as well as tyre and car wash services for drivers to use. This car park is an example of proper planning in the context of the needs of professional drivers, despite the lack of regulations in this area.

The photographs below illustrate the guarded car park and prepared rest and refreshment facilities.







An example of a successfully implemented solution regarding the preparation of parking spaces is the modern, refurbished car park in the German town of Frechen, whose safety is confirmed by the second level of TAPA certification<sup>35</sup>.



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<sup>35</sup> <https://www.bosch-secure-truck-parking.com/en/news/security-area-frechen/> [accessed: 5.01.2022]

<sup>36</sup> Photograph source: <https://www.bosch-secure-truck-parking.com> [accessed: 5.01.2022]

The car park, previously in a very poor technical condition, was modernised by the new operator in cooperation with Bosch. The solution developed is a two-zone car park (free access zone and secure zone) combined with a new petrol station, which has sanitation and utility facilities prepared for drivers. State-of-the-art technology has been used to ensure the highest possible level of security, including the identification of vehicles at entry and exit with cameras scanning vehicle registration numbers, the installation of 20 smart cameras, access control and parking space reservation. What is important, the significance of the planning stage is particularly highlighted in the project - planning was an almost two-year process, thus indicating the necessity to consider the needs of professional drivers starting at the conceptual stage of the investment.

The lack of such systemic solutions is particularly significant in the context of the significant growth of the warehousing market in recent years, with further growth projected in future years. A possibility to change the legal regulations in this respect is to adopt the provisions on Places of Service for Travellers set out in Chapter 3 - Places of Service for Travellers - Technical and Construction Regulations for Toll Motorways (Chapter 3 - Places of Service for Travellers - Technical and Construction Regulations for Toll Motorways. Journal of Laws Dz.U.1997.62.392). The legal regulations should determine the necessity of providing sanitation facilities as well as rest and refreshment rooms as early as at the planning stage of investments of newly created warehouse sites and economic zones. This is necessary in view of the fact that there is often no room for this type of investment in existing logistics centres.

An example of good practice in this respect, which may serve as a model that could be replicated, is the facilities prepared for drivers at MDC<sup>2</sup> Park Gliwice, **a high-quality distribution centre** under construction in Gliwice, located at the junction of Poland's two most important motorways - the A1 and the A4. An important advantage in the context of responding to the needs of drivers is the location of the centre - the main traffic routes in the vicinity of the facility are numerous national roads, providing easy access. At the design stage of the investment, the drivers' needs were taken into account by providing a car park for lorry drivers and external relaxation zones at the drivers' disposal, which will include an outdoor gym, small architecture (benches, rubbish bins) and places where drivers can take a break and have a meal.

The photographs below show the project for the MDC<sup>2</sup> Park Gliwice distribution centre.



The use of modern solutions aiming at the automation of part of the logistic processes, resulting in improvements that will remain valid in the long term, should also be considered good practice. An example of an implemented technological solution is a dynamic system for booking and planning lorry stops based on planned travel routes, with particular emphasis on loading and unloading notifications, developed by the Krakow-based company OVPS and implemented in cooperation with BOSCH and partners from the logistics industry. Thanks to optimisation in this area, logistics companies and carriers can efficiently redirect vehicles to known and accessible parking hubs located close to industrial zones, where drivers can park safely and, with access to all sanitation and rest and refreshment services, wait for confirmed

notifications. The solution significantly improves logistics processes, contributes to better working conditions for drivers and enables optimal use of the road infrastructure in industrial areas. Importantly, the OVPS system is open and, thanks to its simple and intuitive operation, any logistics or transport company can join the pilot project and contribute. The pilot implementation is currently being tested in the Katowice Special Economic Zone and will be developed in additional locations.



In the context of efficient use of small spaces for rest and refreshment facilities, the **compact hotels** being built in Europe dedicated to lorry drivers should also be considered good practice. In 2020, the rest time for professional drivers has been newly and uniformly regulated across the EU in Mobility Package 1. Thus, the weekly rest period of 45 consecutive hours can no longer be spent in the driver's cab. Adequate hotel rooms with parking for lorries are not available in sufficient quantities in EU countries, so the aim of the new EU law is to improve the quality of life of professional drivers, prevent their exploitation and increase safety on European roads. An analysis of the solutions available on the market has shown that there are investments that meet the needs of drivers, thus not requiring significant free space for construction. An example of such a solution are the compact hotels by Roatel GmbH, which creates so-called micro-hotels in service stations and near motorways. These accommodation facilities are tailored to the needs of professional drivers to enable them to comply with the statutory rest period. What is important in terms of free

space, the product implemented by the company is a properly insulated and converted recycled ocean container, so that each hotel unit is compact, mobile and can be configured in a variety of ways. The micro-hotels can be combined to respond flexibly to demand and adapt the offer at any time.

The photographs below show an example of good practice in terms of rest areas prepared for professional drivers<sup>37</sup>.



o **Need for a change of attitude**

It is important to note the twin-track nature of the problems identified by drivers - the most frequently indicated problems related to inadequate infrastructure and the lack of systemic solutions in this area, but in order to bring about change, education is also necessary to raise awareness of the needs and the possibility of implementing them. Drivers pointed out that they face poor treatment and disrespect for the work they do.

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*"Disrespectful behaviour towards the other person. After pointing this out, the driver was often served in anger."*

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<sup>37</sup> Photographs courtesy of Roatel GmbH.

*"Employees accepting documents from drivers are very rude and unhelpful when dealing with document problems. There is often a very long waiting time before documents can be handed over."*

*"Uncommunicative staff, provoking conflict by their behaviour."*

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*Source: Driver's opinion as part of the survey.*

Drivers also frequently drew attention to unequal, unfair treatment by logistics centre staff.

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*"I waited almost 4 hours to unload, the ramps were empty, not a single vehicle. They let company cars through, whose drivers are treated much better."*

*"Operators have their favourite companies and drivers who are served out of turn, straight away."*

*"Security consider themselves lords and masters in this network - if someone starts arguing for their rights, they are informed that they will be banned if they don't calm down."*

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*Source: Driver's opinion as part of the survey.*

In view of the above, it is necessary to change the approach to the needs of professional drivers so that the proposed solutions can become the norm. Along with the implementation of measures responding to the identified infrastructural problems, "soft" measures are also very important, i.e. such as information and promotional activities, training in the context of the law in force and opportunities for improving drivers' working conditions and campaigns, an example of which is the "I am a woman, I am a driver" campaign, carried out by the Truckers Life foundation, whose aim was to draw attention to women in the transport industry and encourage retraining of those women who, for various reasons, faced the need to change their lifestyle<sup>38</sup>. These activities should be conducted in particular by

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<sup>38</sup> <https://www.trans.eu/pl/blog/jestem-kobieta-kieruje-kampania-fundacji-truckers-life/> [accessed: 4.01.2022]

non-governmental organisations and trade unions, which, by working directly with the professional group, have the opportunity to learn about their real needs. An additional effect of such a social campaign will be to counteract low social awareness and unfair stereotypes concerning professional drivers' work, which may have a positive impact on young people's interest in this career path. Through informational and promotional activities, possible solutions will be indicated to both drivers and entrepreneurs.

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## **SUMMARY**

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The transport and warehousing industries in Poland have developed dynamically over recent years, forecasting further significant growth in the importance of road freight transport and the use of logistics centres in the coming years. However, they are facing numerous problems, observed both in Poland and in other European countries. Thus, the demand for labour is growing much faster than the supply of workers, and a significant phenomenon in this respect is the progressive shortage of professional drivers in relation to needs, as well as the fact that this professional group is an ageing group in terms of the age of those working in the industry.

The problems that are identified involve access to basic infrastructure for drivers at logistics centres. Loading and unloading at logistics bases is a lengthy process, often subject to delays and postponements, often requiring drivers to spend up to tens of hours in one place - hence the importance of seeking access to sanitation facilities and safe parking spaces.

Drivers participating in the survey carried out for the purposes of this report also highlighted problems related to the poor treatment of drivers in logistics centres, burdening them with responsibilities and a lack of understanding of their needs.

Neither Polish nor European legislation explicitly regulates the working conditions of a professional driver to the extent indicated above.

There are infrastructure solutions available on the market that can address the identified shortcomings, particularly given the problem of space availability in existing logistics centres.

In order to initiate change, it is also necessary to continue with the informational and promotional activities / information campaigns to change attitudes towards the work of a professional driver.



## Conclusions and recommendations

As part of the survey carried out for the purposes of this report, the main conclusions were identified, together with recommended courses of action for the improvement of drivers' sanitation and parking conditions at logistics bases in Poland and Europe.

### Conclusion 1:

In EU countries such as Germany and Spain, there are lorry driver trade unions that initiate measures to improve the quality of drivers' work.

#### Recommendation:

It is recommended to establish cooperation with associations and non-governmental organisations in other countries in order to exchange experiences and develop proposals for systemic solutions.

### Conclusion 2:

In the context of loading and unloading work, there are no legal regulations comprehensively setting out occupational health and safety rules in warehouse premises. Importantly, there are also no provisions in the current legislation to improve the quality of work of professional drivers at loading and unloading facilities in logistics centres, for example in terms of working time or scope of duties.

#### Recommendation:

Efforts should be made to initiate dialogue with national and foreign institutions and non-governmental organisations in the context of the possibility of amending regulations and developing joint proposals.

### **Conclusion 3:**

A problem particularly frequently indicated by drivers participating in the survey is the lack of sanitation facilities in logistics centres. 52.5% of survey respondents indicated that these locations lacked showers and 41.3% - toilets. The lack of even the most basic sanitation facilities is a particularly difficult situation in the context of many hours of loading or unloading, which was very often mentioned by drivers during the survey. An equally important and frequently identified problem is limited access to parking spaces, which was rated very low by the drivers surveyed - the lowest rating (1 and 2) was given to access to parking by as many as 48.5% of all survey respondents.

### **Recommendation:**

It is recommended to promote feasible, modern solutions applied in European countries as an answer to the identified problems of drivers. Attention should be paid to solutions identified in the course of the survey, which can be effectively adapted in Poland. Examples include modular toilets, compact hotels and distribution centres, which have considered the needs of drivers as early as at the design stage, planning at least the basic amenities that would respond to these needs.

### **Conclusion 4:**

Drivers face a lack of understanding of their needs, unequal and inappropriate treatment and a lack of assistance from logistics centre managers.

### **Recommendation:**

It is recommended to implement "soft" measures aimed at increasing knowledge and understanding of the scale of existing problems. Information and promotional activities should be implemented by non-governmental organisations (including associations and foundations). They should be based on experience resulting from campaigns and information materials that have already been carried out, an example of which is the series of film materials "Stereotypes: truth or myths?" produced by the Truckers Life foundation.

### **Conclusion 5:**

The broad concept of digitisation of systems supporting logistics processes should include issues related to improving drivers' working conditions, take into account infrastructure considerations, and support the efficient management and planning of vehicle stops, both at destinations and en route. The combination of notification, route and load tracking, and integration into fleet or warehouse management systems is an inevitable and necessary step to not only improve processes, but must also be directly translated into improving the standard of work so needed by the industry of drivers, aiming to increase the popularity and attractiveness of the profession of professional driver.

### **Recommendation:**

Comprehensive IT solutions combining warehousing processes, fleet management and load tracking should definitely take into account aspects of drivers' work and make it possible to improve their working conditions. In combination with the increasing development of digitisation and the integration of systems, aspects directly related to drivers' work should be taken into account as early as at the systems analysis stage and implemented in dialogue with users. Cooperation in the broad sense should include and combine economic, social and environmental aspects.

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