

Earnings of Professional Drivers in Poland.

Labor market in the TFL industry



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1. Report in numbers – general summary

830 drivers participated in the survey

The survey was conducted using the CAWI (Computer-Assisted Web Interview) method. The Polish Road Transport Institute prepared and distributed the survey with the support of several industry portals and partners of this report.



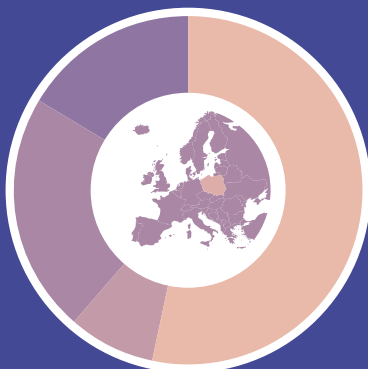
The research results present the earnings of drivers in 2022



NEARLY 90% OF RESPONDENTS ARE SEMI-TRUCK DRIVERS



6% are drivers of buses (with a GVW of up to 3.5 tonnes) and other specialized vehicles



53% of the surveyed drivers operate on international routes within the European Union

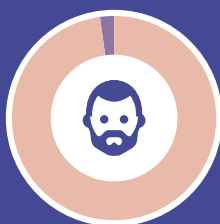
8% drive on international routes outside the EU

22% are employed in domestic traffic

16% of respondents drive on typical local routes



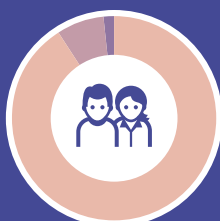
Compared to the group surveyed in 2021, there was a 2% decrease in traffic outside the EU, with 10% more drivers servicing domestic and local routes.



Our research shows that professional driving is still male-dominated (**98%**), with women accounting for only **2%** of all respondents.



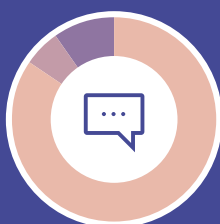
69% of respondents are under 40 years old, with the largest age group among drivers being 31-40 at 38%. Only **5%** of respondents reported being under 25 years of age. The remaining participants (31%) are over 41, of which 10% are 51 years or older.



60% of respondents are married, with three in ten drivers being single. Divorcees account for **5%** of the total, whereas **1%** are separated. Compared to 2021, the percentage of married respondents decreased by 12%.



91% of respondents are employed under an employment contract, with 3% being employed under a contract of mandate and 5% declaring they are self-employed. The percentage of those employed under a contract of mandate decreased by 4%, while the percentage of self-employed drivers increased by 2%.



44% of respondents declare a conversational command of English, with two out of ten drivers speaking German and 9% Russian. In total, 27% of drivers claimed command of at least one other language (French, Slovak, Czech, Ukrainian, Italian, or Spanish). **Only 5% of respondents admit to being unable to communicate in any foreign language.**



80% of surveyed drivers enjoy their job! This represents an 8% growth compared to 2021. Only four out of ten drivers think about changing their profession, which is an improvement over previous years. Only 19% of drivers did not consider changing jobs at all.

Respondents value truck driving, freedom, and not having a boss looking over their shoulders the most. Drivers most often complain about theft on roads and parking lots.

In addition to earnings, the previous report also discussed the benefits and technologies used by drivers and carriers in road transport.

In this publication, in turn, our focus goes beyond only the compensation of drivers as we will also examine the remuneration applicable to other job positions related to the TFL industry.

We hope you find this report interesting and informative.

2. Earnings of professional drivers

The year 2022 saw significant developments with the introduction of additional provisions under the Mobility Package. These regulations focused on cabotage transport and the rights of carriers with fleets of buses. While these changes improved drivers' situation, they also imposed new obligations and financial burdens on their employers.

2.1 Mobility Package – changes in cabotage transport

Cabotage is a popular road transport service performed in a country where the haulier is not established. The provisions of the Mobility Package are intended to hinder the operation of “letterbox companies,” i.e. companies with fictitious headquarters in countries with lower labor costs. However, everyone, including carriers operating legally, will bear the costs of this pushback.

As per the regulations effective since February 2022, vehicles engaged in cabotage transport are restricted to a maximum of three such operations within a seven-day period in any given country. Following three consecutive cabotage operations, a mandatory four-day break must be observed before undertaking any subsequent cabotage activities. The cooling-off period starts on the next calendar day following the date of the last unloading.

In addition, any vehicle performing cabotage operations must return to the carrier's country of registration no later than eight weeks after departure. Importantly, the driver should return to their place of residence or the carrier's registered office at least every four weeks. Until recently, it was common for a driver's return to their base to be contingent upon the completion of loading. In the event of an empty run, it was more advantageous for the carrier to leave the vehicle in the country where cabotage was performed and have the employee return by public transport. Following the changes, in many situations, returning to the base with the vehicle will be necessary, which means higher costs associated with forced travel and increased CO2 emissions. This, in turn, contradicts the assumptions of the “Fit for 55” climate package, which imposes far-reaching emission limits on the transport sector.

Losses are, therefore, inevitable, and attempts to circumvent the regulations will expose carriers to penalties. Failure to return to the base every eight weeks is punishable by a fine of PLN 2,000 in Poland.

The Mobility Package also introduced detailed provisions on drivers' working time in cabotage operations.

2.1.1 Pakiet Mobilności – odpoczynek kierowców i praca w załodze dwuosobowej

The Mobility Package introduces changes to the regulation of rest periods for drivers involved in international transport. The provisions differentiate between a regular rest period (45 hours) and a reduced rest period. To improve drivers' working conditions, the Mobility Package mandates that regular rest periods cannot be spent in the vehicle cabin; instead, they must be taken at a hotel or other suitable accommodation.

Detailed regulations also address reduced weekly rest periods. Drivers may take two consecutive reduced weekly rests, provided they are spent outside their country of residence. However, these must be followed by two regular weekly rests at the driver's home or company premises. Furthermore, even when compounded, reduced rest periods cannot replace regular ones.

Rest periods are also related to double-manning regulations. According to these rules, drivers must switch positions behind the wheel every 4.5 hours, and the total driving time cannot exceed 9 hours. After driving for the designated time, each driver must take a mandatory 45-minute break, which can be spent in the vehicle cabin. Importantly, double-manned crews must take a 9-hour daily rest.

2.1.2 Mobility Package – changes to posting regulations

The provisions on posting introduce a new element, referred to as industry pay, which is included in drivers' remuneration. The industry pay applies in the country through which the driver passes and performs cabotage or cross-trade transport (transport carried out between two countries by a haulier not established in either of these countries).

Additionally, drivers' remuneration no longer includes per-diems and flat-rate accommodation allowances. Consequently, drivers' remuneration now consists of:

- the base pay,
- the industry pay in a given European Union country,
- bonuses.



Under the new compensation structure, all pay components are subject to taxation and contributions to the Polish Social Insurance Institution (ZUS). Moreover, carriers are no longer required to cover the business trip expenses, as drivers conducting transport under posting regulations are no longer considered to be working as part of a business trip.

Each posting must also be reported through the IMI system (Internal Market Information System), i.e. the European Posting Declaration Portal, which replaced the national systems upon its launch on 2 February 2022. It is recommended that drivers carry a copy of the IMI posting declaration in case of inspection. The declaration must include details such as the information of the driver and transport manager information, the start and end dates of the posting, and the type of transport. Additionally, the driver must register each border crossing in the digital tachograph.

2.1.3 Mobility Package – expanded licensing obligation

Another step towards improving working conditions for drivers in international goods transport is imposing additional obligations on operators of light commercial vehicles (LCVs) weighing between 2.5 to 3.5 tonnes. As of 20 May 2022, they are required to obtain a Community license, which involves additional obligations and requirements for such operators.

To obtain a Community license, the carrier must have a permit to pursue the occupation of road transport operator, a permanent and real seat of the company, a Certificate of Professional Competence, and provide a financial guarantee of 1800 Euros for the first vehicle and 900 Euros for each additional vehicle. Only after meeting these requirements can the carrier apply for a Community license. The cost to satisfy these requirements is in the range of several thousand zlotys.



Jakub Szatek,
Trans.eu expert

Despite major concerns related to the introduction of new provisions in the Mobility Package, the transport market quickly adapted to the changes. Polish carriers skillfully navigated the biggest challenges: changes to the way drivers are compensated (for vehicles over 3.5 tonnes) and the Community license requirements (vehicles up to 3.5 tonnes). As a result, in the first half of 2022, the anticipated decrease in transport capacity did not materialize. The reasons for the change in this trend in the second half of the year should be sought elsewhere. It was primarily the economic slowdown and the related decline in manufacturing that contributed to the historically low demand for transport in the lead-up to Christmas and a very difficult first quarter. Interestingly, carriers

with fleets up to 3.5 tonnes seem to be faring better in these challenging circumstances.



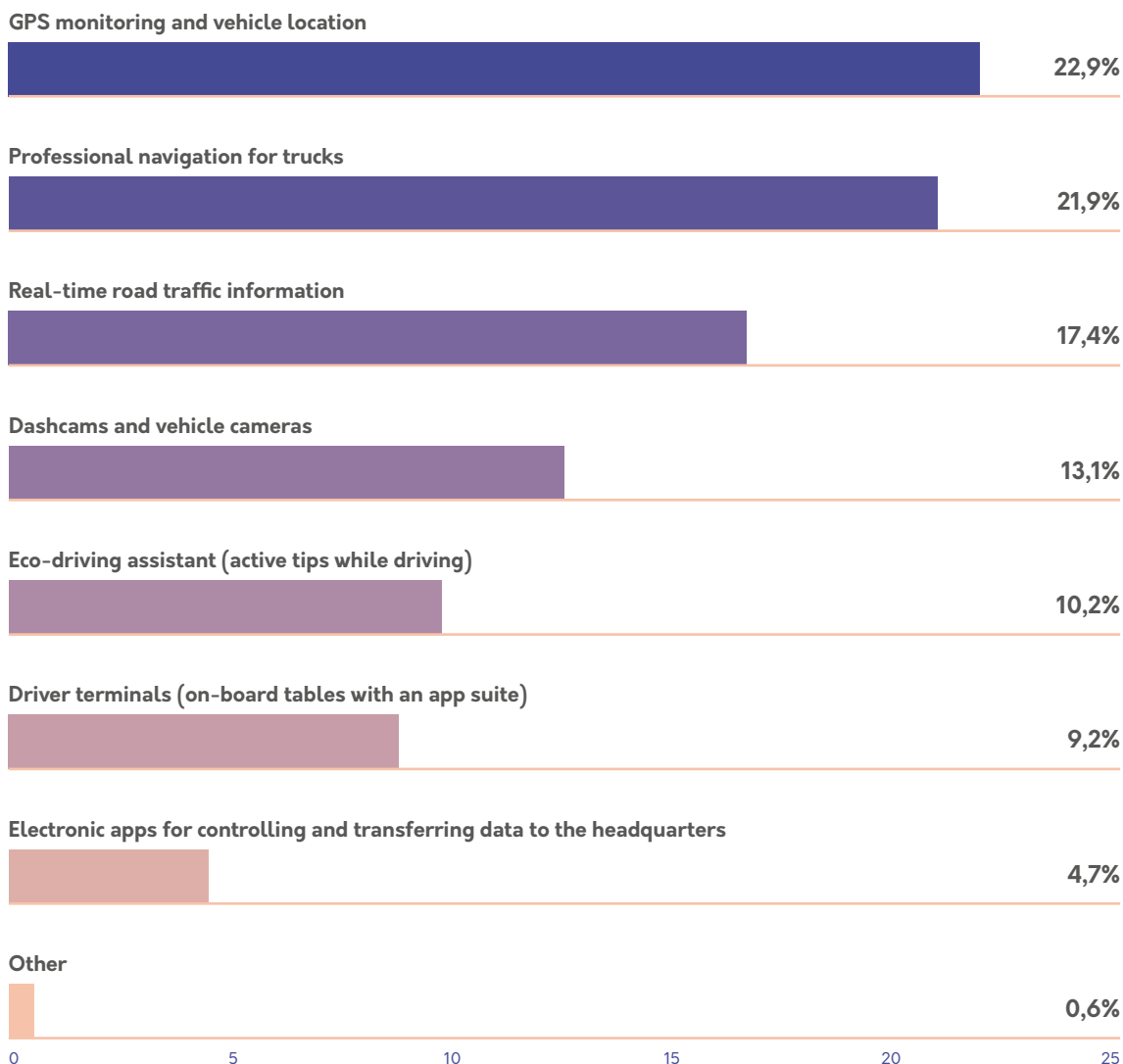
2.2 Respondent characteristics

As previously noted, the study was heavily male-dominated, with men making up 98% of the respondents. Another dominant group was semi-truck drivers. The remaining respondents, including drivers of solo trucks, buses, and other vehicles, accounted for only approximately 18% of the participants. The European Union still remains the most popular destination for Polish professional drivers. Almost nine out of ten Polish drivers work for Poland-based companies. Among employers based in other locations, Germany is the only notable country of employment.

Interestingly, a substantial share of drivers operates new vehicles on a daily basis, with nearly four out of ten driving vehicles no older than three years. The number of drivers operating older vehicles is consistently declining, with only 8% of the respondents using vehicles manufactured more than ten years ago, a positive trend. The survey predominantly comprised middle-aged drivers and those employed by small and medium-sized companies.

The vast majority of the respondents, about 72%, use new technologies. Basic telematics, such as vehicle location and GPS monitoring, continue to be the most widely used technology at approximately 23%. Navigation for trucks and road traffic information rank second and third, respectively, at 22% and 17%. Driver terminals and electronic apps for controlling and sending vehicle performance data to the headquarters, known as “vehicle checks,” had the smallest share of responses, below 10%.

What technologies do you use?



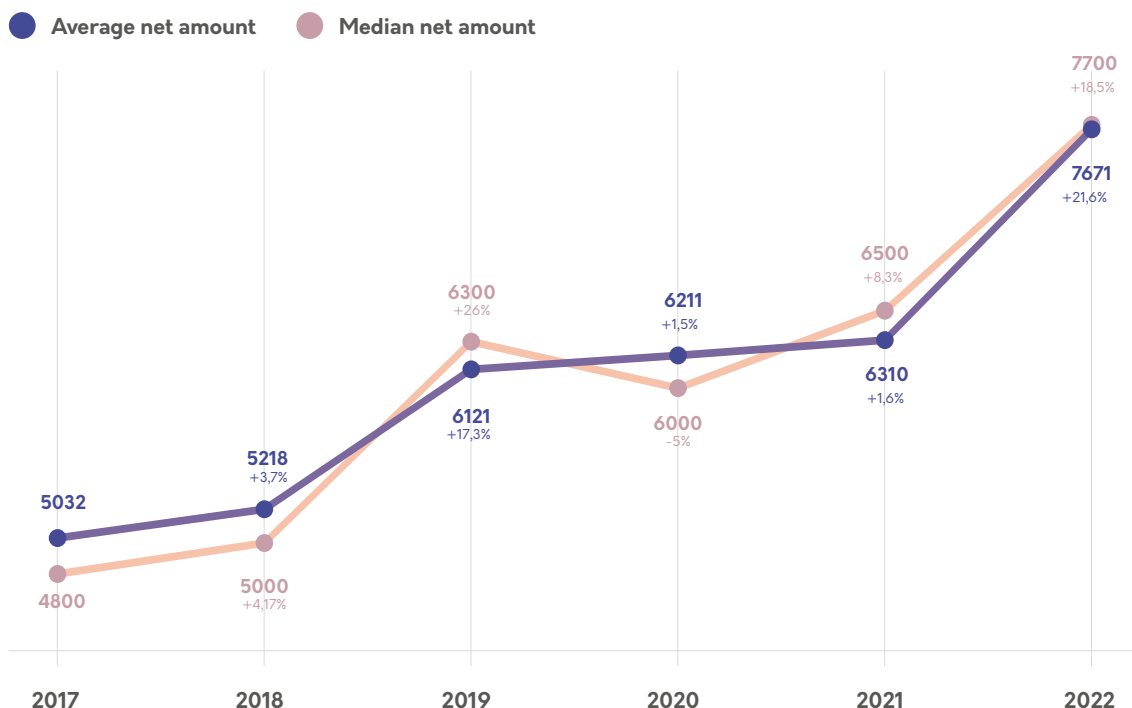
2.3 Comparison of drivers' compensation in recent years

In this 6th edition of the report on the earnings of professional drivers, it is worthwhile to compare the findings with those of previous years. TFL professionals know that 2022 saw pay increases related to the Mobility Package. The question is, how much did drivers' compensations increase?

In the analysis below, we considered drivers of trucks, semi-trucks and solo trucks. We disregarded the type and schedule of work and made no distinction between local and international routes.



Comparison of drivers' remuneration in 2017-2022*



*The amounts given represent the total take-home pay, which consists of: the base pay and other allowances.

For professional drivers, the average net salary in 2022 increased by 21.6% compared to the previous year. The median, in turn, increased by PLN 1,200. In 2022, the average net salary for truck drivers stood at PLN 7,671. Is that a lot?

In the first three quarters of 2022, the Polish Central Statistical Office (GUS) reported that the average salary in transport companies increased by approximately 20% year on year. During Q1-Q3 2022, the average gross salary in the transport and warehouse management sector was PLN 6,080.40, indicating that the remuneration for drivers is higher than the sector average. However, the salary for drivers varies depending on factors such as their work mode, schedule, and country of employment. A more in-depth discussion of this topic is available further in the report.

Bus drivers also took part in the survey, representing 6% of all respondents. The table below shows that bus drivers earn less than truck drivers, but this is partly due to the fact that buses are typically used for local transport. Half of the surveyed bus drivers serviced domestic routes, while the other half serviced international ones.



Earnings of drivers in 2022

Bus driver



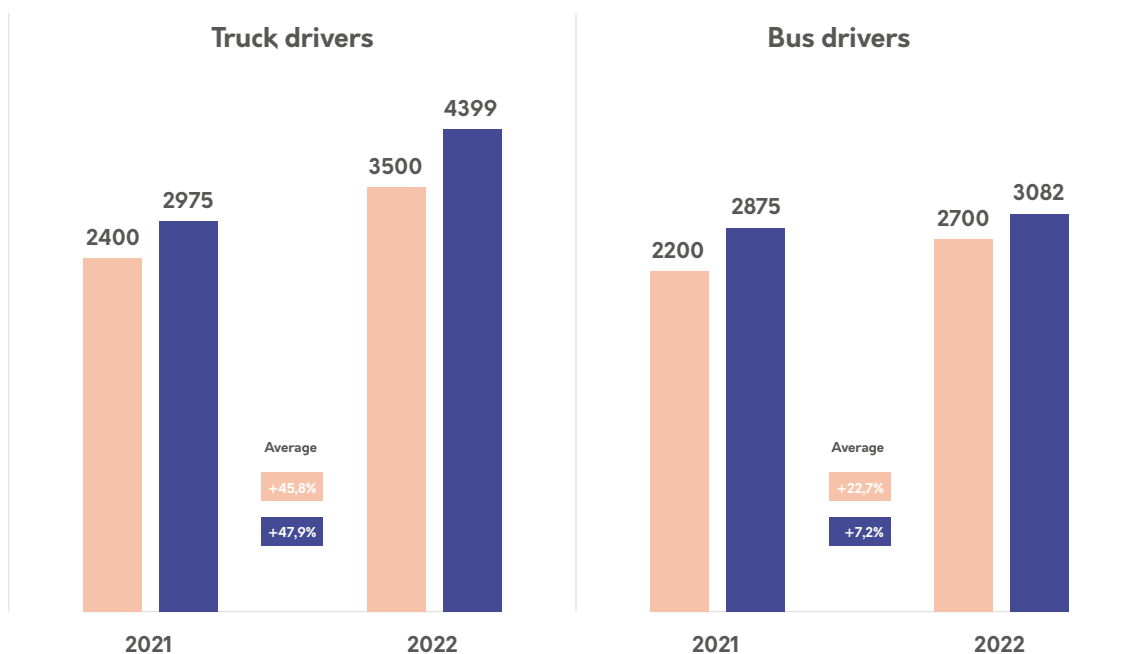
The remuneration of professional drivers in Poland has quite a complex structure. Therefore, we decided to combine base pay with other additional pay components. Why? Because these values offer the best approximation of reality. Additional pay components, e.g. bonuses, overtime or per-diems represent a substantial part of this remuneration. Let's remember, however, that this directly follows from the regulations on the method of remunerating professional drivers. The Mobility Package and the new Road Transport Act introduced changes in 2022.

So what is the base pay?

What base pay did you receive in 2022 (amount without any additional components)? [PLN]

● Net average

● Net median



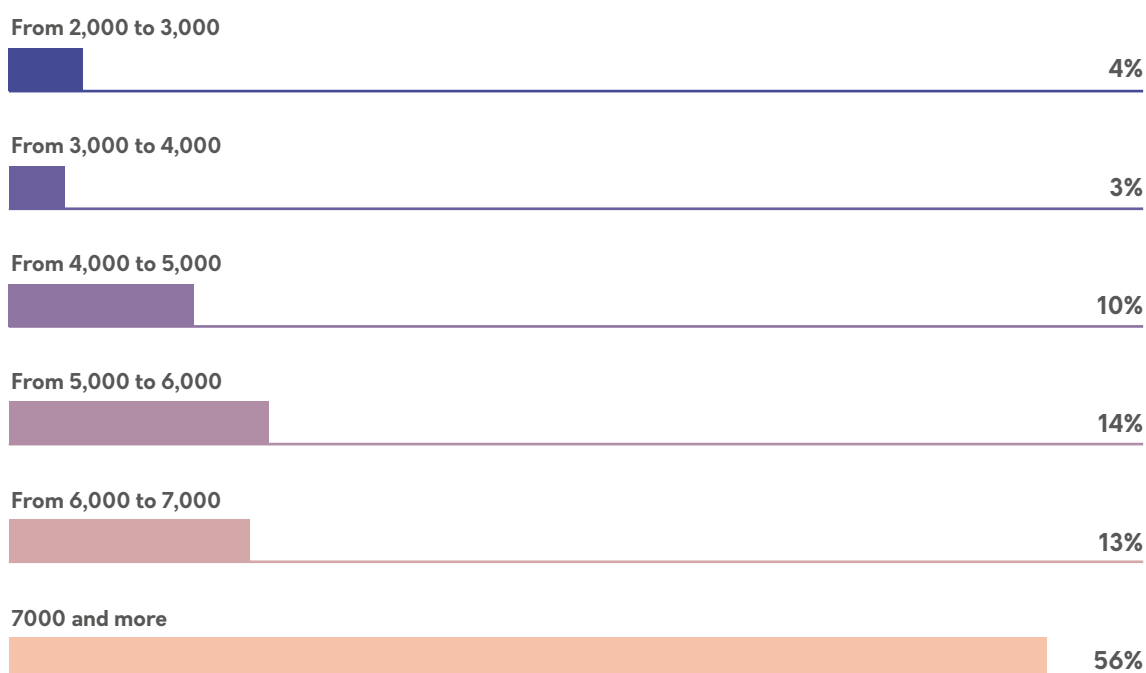
The average net base pay of truck drivers increased by nearly 50%, and that of bus drivers by 7.2%

An analysis of the values from previous years shows that the base pay has grown significantly. In 2022, the national minimum wage for an employment contract in Poland was PLN 2,364. In the case of professional truck drivers, the average base pay is PLN 4,399. This is almost 50% more compared to 2021 and much more than the minimum net wage. The rest of the salary is paid in bonuses, etc. This is evidenced by the results provided in the previous table. Further in the report, we will present our findings regarding drivers' satisfaction with their salaries.

2.4 Salary structure (ranges) in 2022

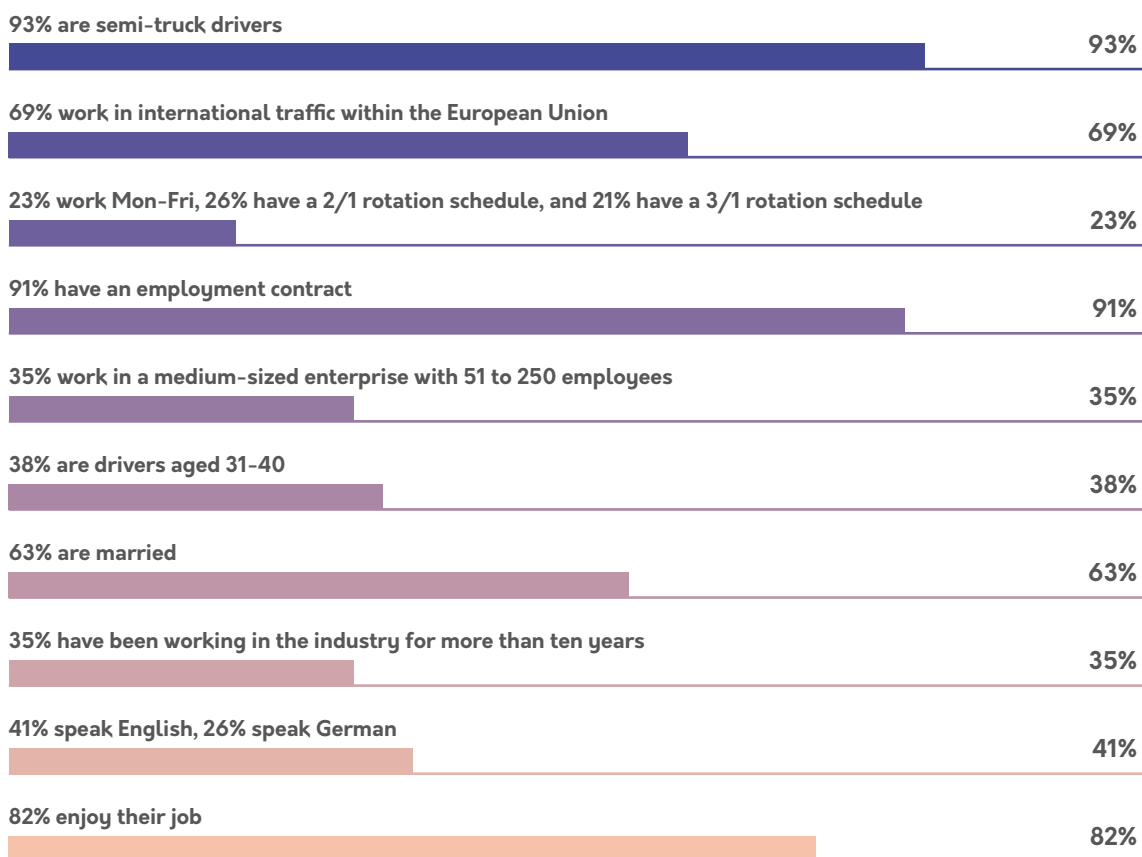
We also surveyed truck drivers about their total net pay. We divided the values into ranges, enabling us to determine the most common salary range among drivers.

Salary range [PLN net]



In 2021, 28.1% of drivers earned less than PLN 5,000 net. However, in 2022, this group decreased to 17%. The presented data indicates that driver earnings are significantly above the average salary or national average. On the one hand, drivers receive high salaries; on the other, they face challenging working conditions. Over half of the surveyed drivers earn more than PLN 7,000. Various factors contribute to drivers' remuneration, with the individual elements discussed further in this report.

Characteristics (model) of a driver with a monthly take-home pay of PLN 9,000:

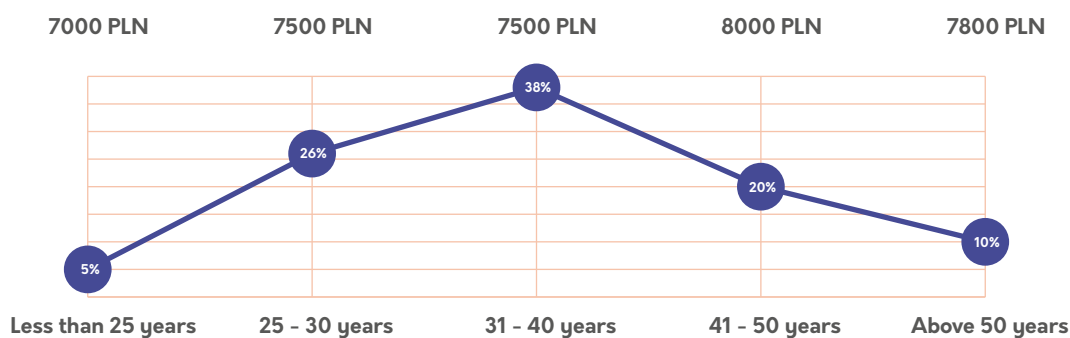


30% of the respondents earn over PLN 9,000 per month!

2.5 Driver age and salary

It was not possible to explicitly determine how experience affects the salary of professional drivers. So what about their age? The results are listed below.

Age:

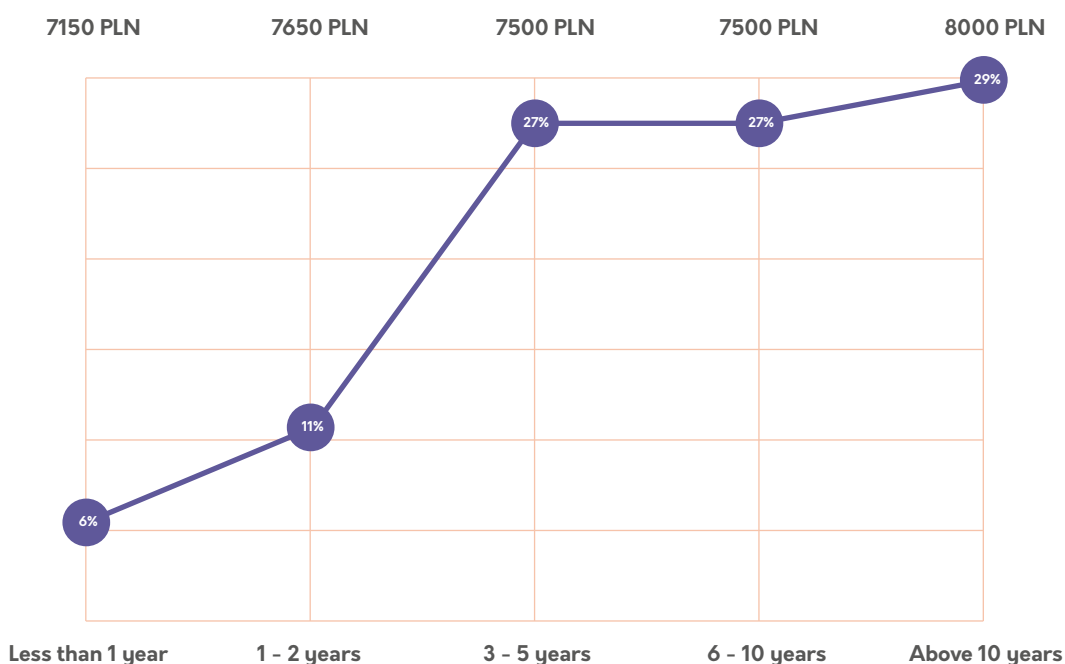


Drivers aged 31 to 40 represent the largest group of respondents, consistent with last year. Previously, the oldest drivers earned the lowest salary. However, in 2022, it was drivers under 25 years who received the lowest compensation. Drivers aged 31 to 50 account for 58% of respondents, with those **aged 41-50 earning the most, followed by the oldest ones.** This may be attributable to their extensive experience and involvement in international trips. We will examine this aspect in greater detail later in the report.

2.6 Driver experience and earnings

If older drivers receive higher pay, is this trend influenced by their experience? Do employers consider the experience of drivers and does their remuneration depend on it?

Driver experience in the sector



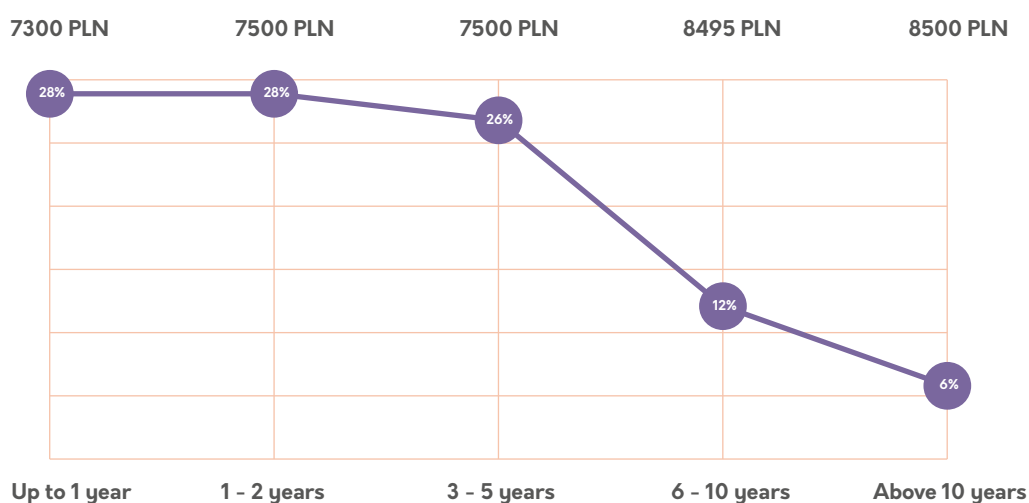
Most respondents have over ten years of experience. The next largest group consists of drivers with three to ten years of experience. Both categories account for more than half of all respondents. The participants in the study are highly experienced drivers with several years in the industry. Previous reports indicated that less experienced drivers earned considerably less. Respondents with over ten years of professional driving experience have the highest median earnings. Based on the data presented in the table, it is not possible to conclusively determine whether experience impacts remuneration.

22.7 Seniority with one company and earnings

Similar to other industries, there is a pervasive belief that “the more experience you have, the more you earn”.

So, how does experience with one employer affect the earnings of drivers of semi-trucks and solo trucks? Below are the drivers’ responses.?

Seniority



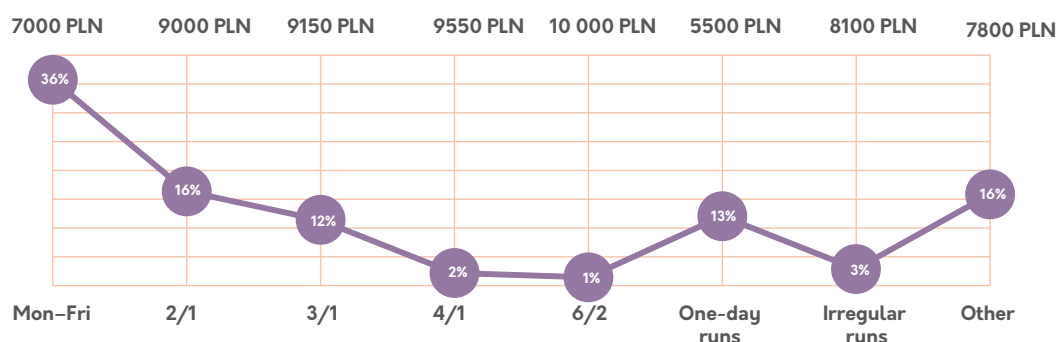
Based on data from previous years, the highest earners were drivers who have been employed by a particular company for one to two years. However, in 2022 the situation changed, illustrating an almost textbook pattern: **the longer you work for a given employer, the more you earn**. The most significant rise in median earnings was observed among drivers who had been with their employer for over ten years, as they saw a PLN 2,500 increase compared to last year's report.

Eighty-two percent of respondents have been working for one employer for less than five years. What could this imply? There are over 40,000 transport companies in Poland that carry out road transport. Consequently, the labor market in road transport is vast. Drivers can choose their employers, work location, or rotation schedule. Drivers have no issues finding employment, which is why they often switch jobs to find the “perfect employer.”

2.8 Work schedule and remuneration

Drivers may have varying work schedules depending on their employer, the type of cargo they transport, and whether the company primarily operates on permanent contracts or relies on spot loads. Below are the results of salaries for truck or semi-truck drivers based on the rotation schedule.

Current work schedule



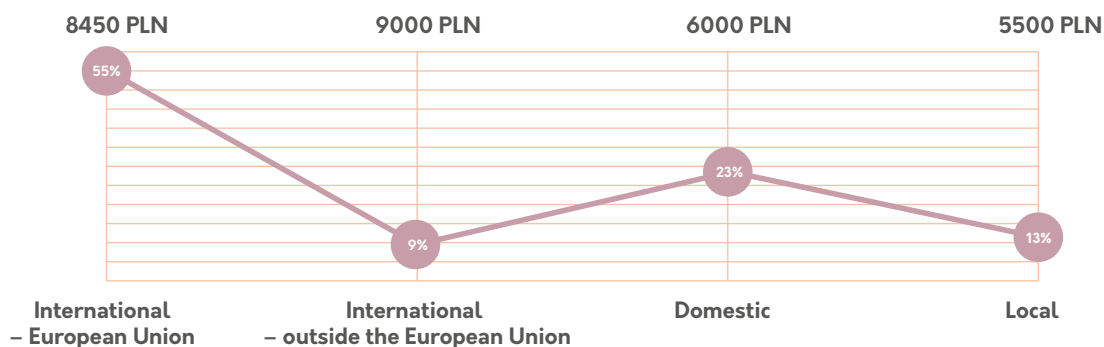
As in previous years, the most popular work schedule involves working from Monday to Friday, which applied to 36% of respondents. The least common rotation schedules are: 4/1, where the driver works for four weeks and then has one week off at home, and 6/2, where the driver is on the road for six weeks, followed by a two-week break at home. All schedules with more than seven working days have a median of over PLN 9,000 net. Under these schedules, drivers work in international transport, hence the high salaries. One-day runs or irregular runs are also gaining popularity. Thus, compared to other professions, a net pay exceeding PLN 5,000 appears to be very attractive.

All the amounts analyzed so far are significantly higher compared to previous years due to the regulations of the Mobility Package, the increase in the national per-diem rate, etc.

2.9 Type of routes serviced and compensation

An analysis of our research results shows that the share of drivers working on international routes outside the European Union is increasing yearly. Below is a summary for trucks, semi-trucks, and solo trucks.

Types of routes





In 2018, our study on earnings revealed that those who serviced international routes within the European Union were the highest earners. Interestingly, people working on routes to the east or north (outside the EU) earned almost 10% less. Since 2020, the situation has changed. Drivers with non-EU destinations now earn the most. Traveling outside the EU can be risky, especially in certain countries (e.g., due to the impact of the war in Ukraine). Additionally, infrastructure and parking facilities may be poorer than their EU counterparts.

Older or still inexperienced drivers usually drive on national or local routes. In this case, the median of net earnings is also PLN 5,500-6,000. **In international transport, these amounts are 50% higher than in domestic transport.**

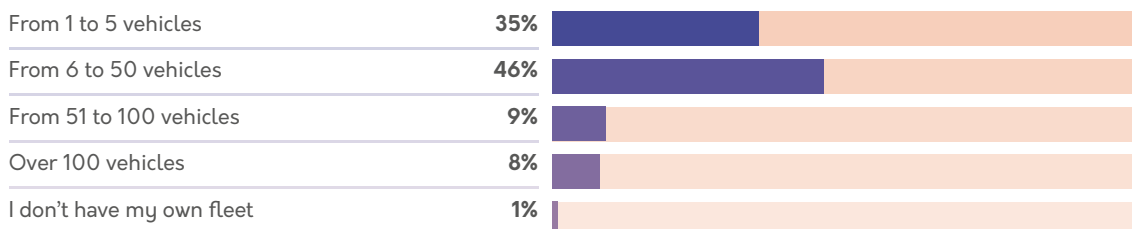


3. What do employers offer?

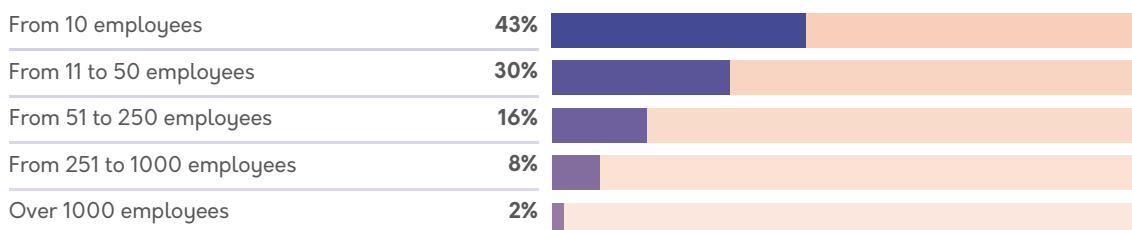
Two hundred employers participated in our survey, primarily servicing international transport within the European Union (64%). Half of the respondents have been operating in the market for ten years. Every fourth respondent is a company that has been operating for two to ten years. Our respondents mainly comprise small and medium-sized enterprises operating a fleet of one to fifty vehicles.

Characteristics of respondents

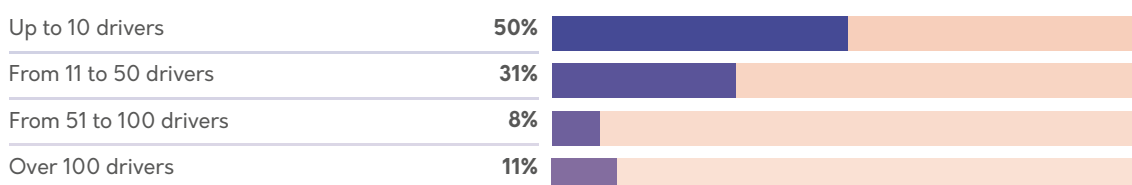
How big is your company's fleet?



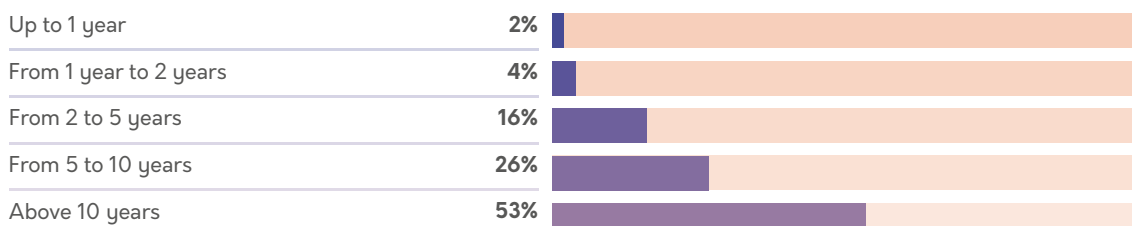
How many employees does your company employ?



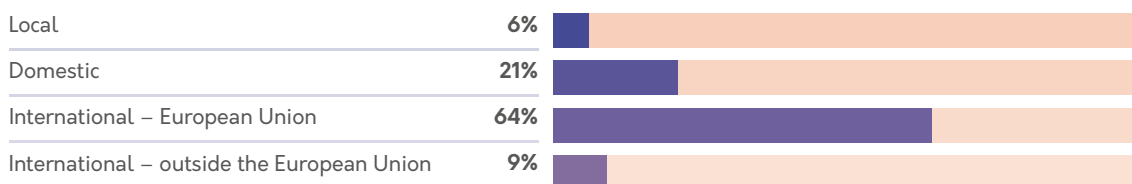
How many of the employees are drivers?



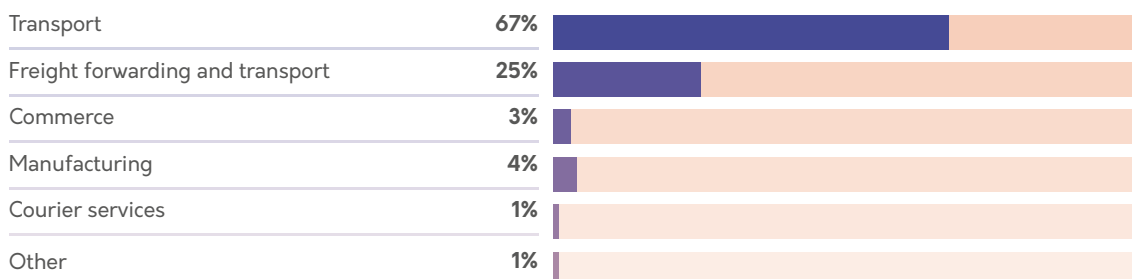
How long has your company been on the market?



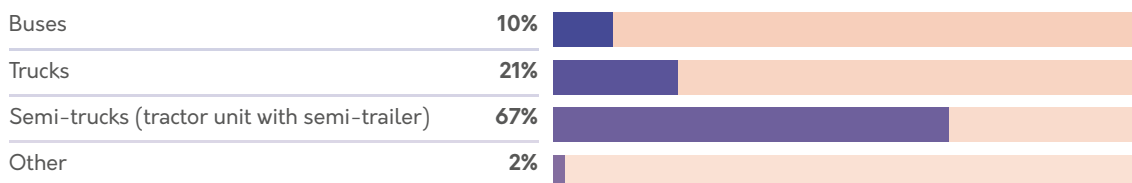
What kind of routes do your drivers usually service?



What is your sector?



What kind of vehicles do your drivers usually operate?



Employers with up to ten employees represent the largest group of respondents accounting for 43% of the total. One in ten companies employs more than 250 employees.

Half of the respondents employ up to ten drivers. Two out of ten companies employ more than 50 drivers.

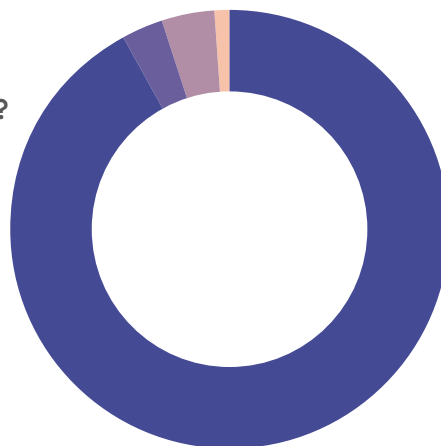
In the analysis, a fairly important element is also the sector of a given company, as well as the main destinations their drivers service. 70% of companies operate in the transport industry and 25% in the freight forwarding and transport industry. Manufacturing and courier services had the fewest representatives in the survey.

3.1 What salaries do employers offer?

Many factors influence how employers compensate drivers. To begin with, let's examine the working conditions offered to professional drivers by their employers. Almost 90% of the respondents manage a fleet of trucks.

What type of contracts do your drivers mainly have?

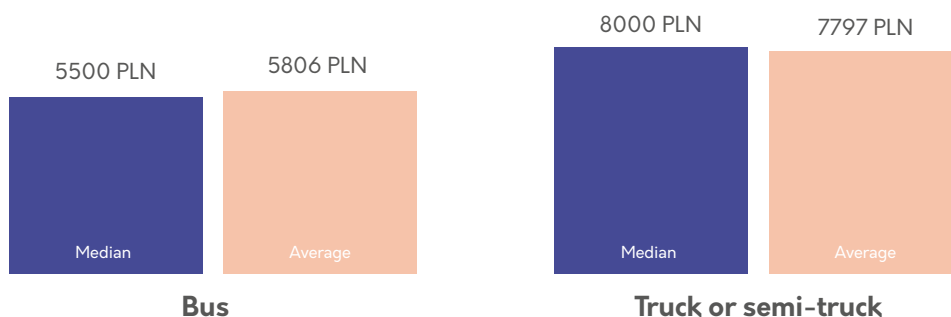
Employment contract	92%
B2B (self-employed)	3%
Contract of mandate	4%
Other	1%



The implementation of additional regulations within the Mobility Package raised concerns that drivers may increasingly be employed under alternative arrangements rather than traditional employment contracts. However, among the surveyed employers, employment contracts remain the most common form of employment. Drivers' responses were similar, with 91% of them working under employment contracts, 5% engaged on a B2B basis (self-employed), and 3% operating under a contract of mandate.

The analysis presented in Section 2 shows that bus drivers earn less than both truck, semi-truck, and solo truck drivers. What conditions were offered to these drivers by their employers?

In 2022, what was the average net monthly salary received by your driver of a:



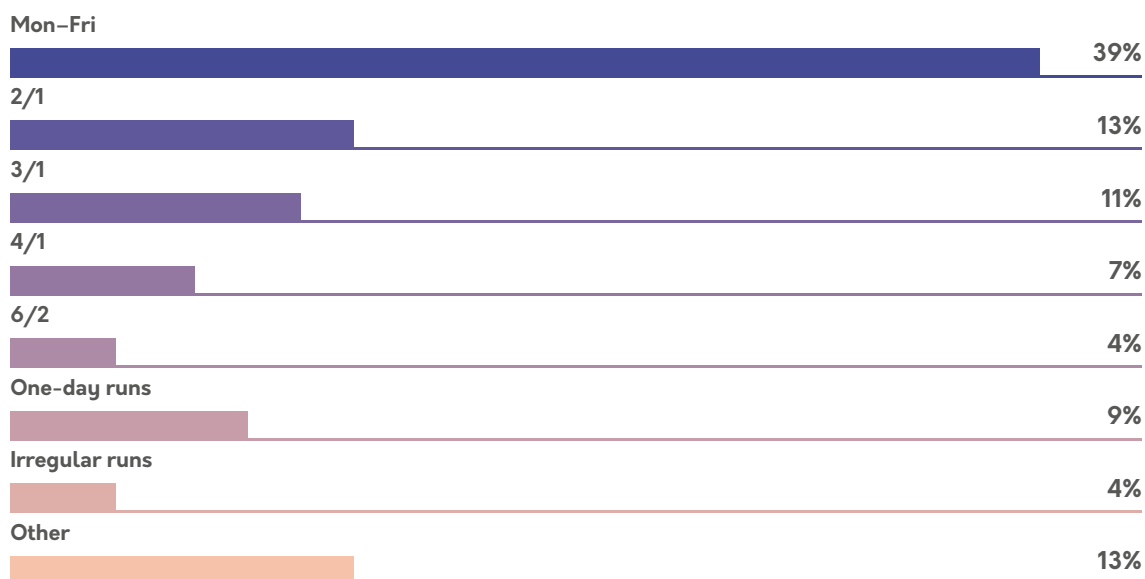
The difference between the average earnings of bus and truck drivers is almost PLN 2,000 net, with a median earnings difference of around PLN 2,500 net. **Bus drivers reported earning an average of PLN 5,172 net, with a median of PLN 4,400 net.** There is a substantial discrepancy between the assertions of employers and drivers. Moreover, this discrepancy is significantly influenced by the type of routes primarily served, whether international or local.

For truck drivers, the results are similar. The median is PLN 300 higher than what the drivers reported, while the average is PLN 126 higher. This confirms that the data can be reliable. Of course, a more in-depth analysis may show differences in salaries. What other factors affect wages?

3.2 What work schedules do employers most often offer?

Drivers indicated that they typically work from Monday to Friday. The companies they work for predominantly carry out international transport within the European Union (55%). Employers' responses were similar, with 64% handling goods transport within the EU. So, what schedules do employers most commonly offer?

Current work schedule:



Employers most frequently offer employment on a Monday-to-Friday basis. Followed by 2/1 or 3/1 rotation schedules or other options such as 2/2. As noted in Section 2.8, the highest median earnings reported by drivers are in the 6/2 rotation (PLN 10,000 net) and the 4/1 rotation (PLN 9,550 net).



4. Benefits and raises. Do all drivers get them?

This report shows that drivers earn quite a lot compared to other professions. This can be attributed to a number of various factors, sacrifices, and risks associated with this line of work. Drivers often work long hours and are frequently away from home, typically in another country. While on the road, they usually sleep in the vehicle cabin, although this practice is expected to change due to the Mobility Package. Drivers are also exposed to numerous dangers, whether at rest areas or while traveling.

So how can these risks be mitigated? Is remuneration the only way for companies to retain drivers? Do drivers get raises? What benefits can they expect? We aim to address these pressing questions further in this Section.

4.1 Benefits in the eyes of drivers

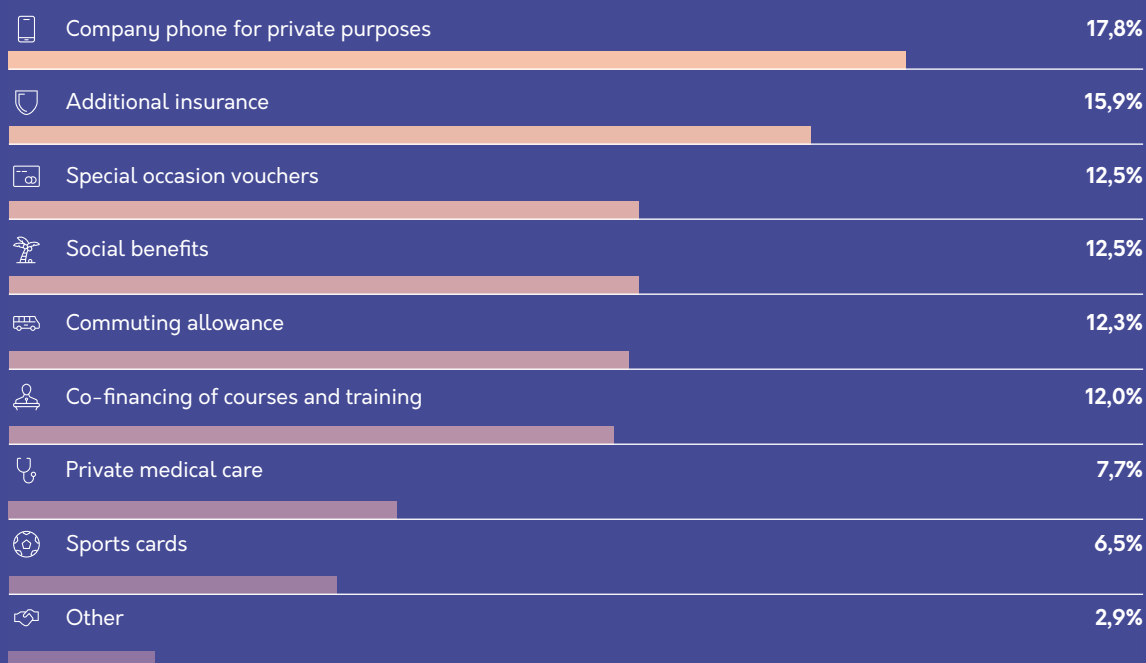
Employees are increasingly receiving more benefits in the labor market. Sports cards and medical care have become standard in most businesses. “Fruit Thursdays,” sports activities, and team-building trips are just a few of the incentives offered by employers.

What about drivers? Are “fruit Thursdays” and sports cards important to them? Especially considering that they spend most of their work in their vehicles, often abroad. In our survey, we asked about the benefits that are important to them, what they use and what they would like to have in the future. In both cases, respondents could select multiple answers.



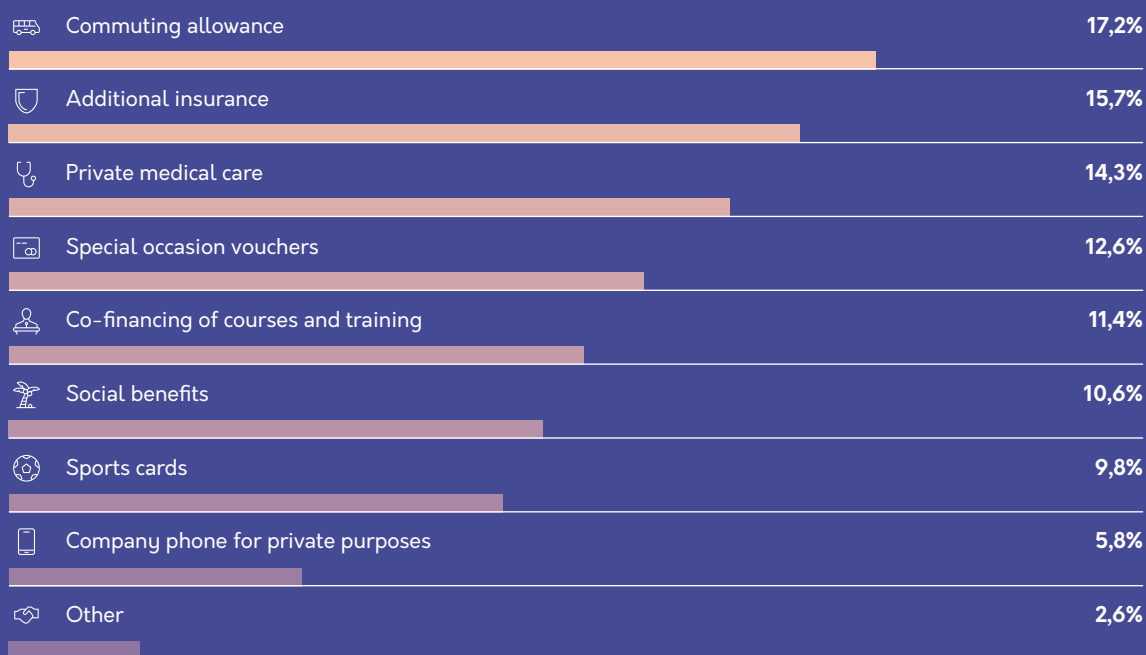
ONLY every third driver receives any benefits

What benefits do you receive?



As “other” drivers mentioned a holiday allowance, additional bonuses or work clothes.

What benefits would you like to receive?



Other benefits that drivers want to receive include pension contributions, holiday vouchers or **verbal recognition**.

We asked the same question in a previous survey in 2021. **At that time, only every second respondent received benefits.** Drivers most frequently received additional insurance, a company phone, and commuting subsidies. In 2022, drivers continue to receive similar benefits, such as **a company phone, additional insurance, or some vouchers and social benefits.** These can be considered fairly basic benefits in this profession, particularly considering the occupational risks involved. Benefits that are standard in other industries, such as private medical care and gym memberships, are relatively uncommon for drivers. It is unfortunate because medical care, particularly family packages, could be a desirable addition to the benefits offered.

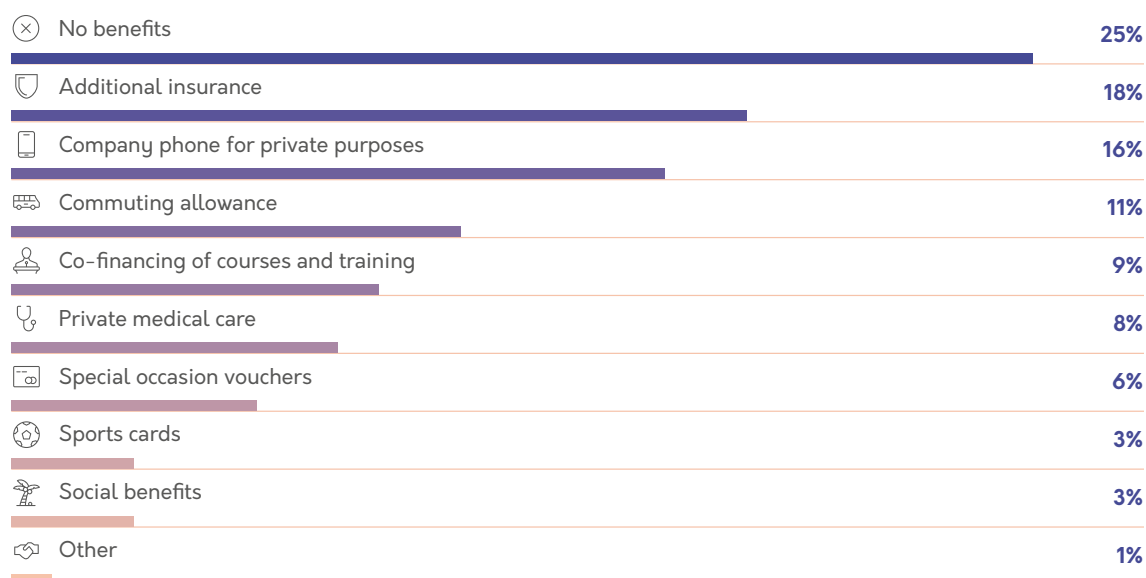
The benefits that drivers desire the most include commuting allowances, additional insurance, and private medical care.

Considering the significant changes related to the Mobility Package, primarily affecting drivers, we inquired whether their employers provided them with appropriate training. **Only 15% of drivers reported receiving such training.**

4.2 Benefits from the point of view of employers

Now that we examined the benefits that drivers receive, let's take a closer look at their employers. We also asked them about the benefits they offer their drivers.

What benefits do drivers currently receive in your company?





In 2021, only 11% of employers did not provide any benefits to their drivers. In 2022, this figure increased to 25% of all employers. Only every third driver reports receiving any benefits, so the results overlap.

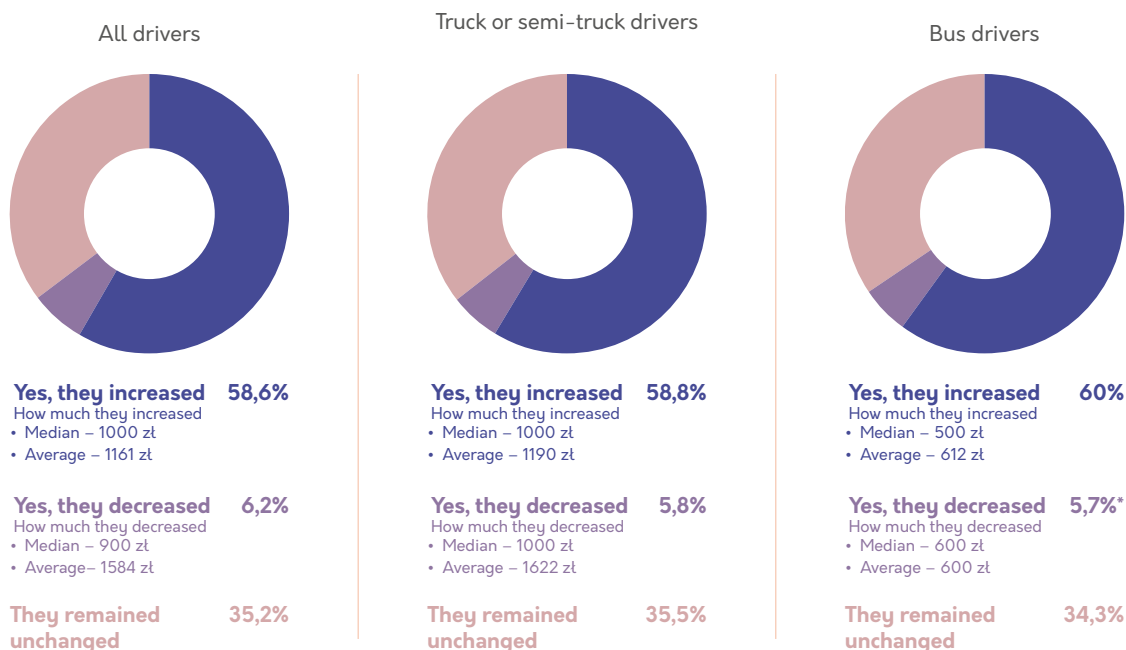
When benefits are offered, the **most common ones include additional insurance**, followed by a company phone and a commuting allowance. At the bottom of the list are private medical care, special occasion vouchers, sports cards, and social benefits.

It is concerning that benefits are not highly prioritized by employers, particularly considering the current shortage of drivers in the industry.

4.3 Did drivers receive raises?

. When conducting our research annually, we found that in most cases, the COVID-19 pandemic did not result in salary reductions for professional drivers. In many sectors, employers provide annual raises, regardless of how small they may be. However, the situation is different for drivers because they need a higher salary due to regulations included in the Mobility Package. So, the question is, how much did their salaries increase? In the comparison below, we also considered bus drivers, who accounted for 6% of all respondents, making the rate of truck drivers more reliable.

Have your monthly earnings changed between 2021 and 2022? Amount in PLN net



*only a few answers – data may not be reliable.



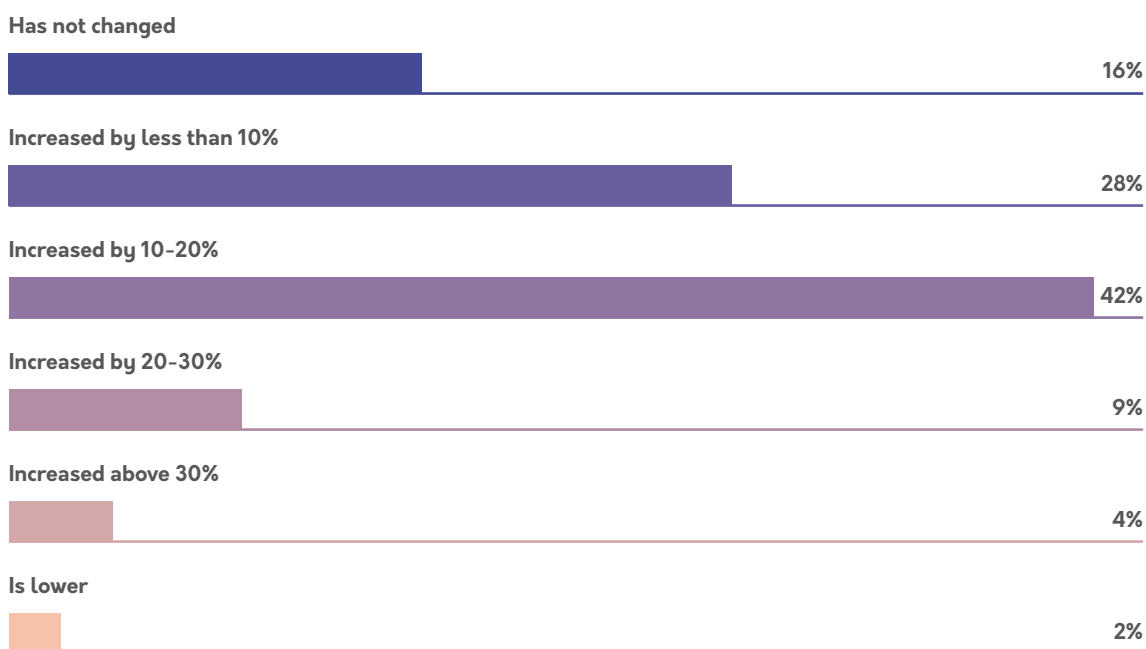
Nearly 60% of all drivers stated that in 2022 their salaries increased compared to 2021. This marks an increase of almost 20% compared to the 2021/2020 figures when the impact of the COVID-19 pandemic and related lockdowns was felt. In contrast, three out of ten drivers say their salaries did not change. Truck drivers' median net salary growth is PLN 1,000 net, making it an appealing increase compared to other industries. The median earnings for truck drivers are PLN 7,700 net, marking a 13% increase in median earnings and a 15.5% increase in average earnings. The results seem credible.

Only 5.8% of truck drivers experienced a drop in pay, less than in the previous report. Does that really mean they had a lower salary? Yes and no. **It is important to note that drivers' compensation also comprises bonuses and other components.** This may indicate that drivers whose salaries decreased work less or drive on domestic rather than international routes. It could also suggest that driving was an odd job for them or that they spent more days working within the country than abroad.

The same trend was observed among bus drivers, where six out of ten respondents reported an increase in their salaries. However, looking at how much they increased, the average earnings increased by PLN 205 compared to the results from the previous publication.

Now it's time for employers' responses. Do they give drivers raises? If so, how significant are they? Answers below.

Compared to 2021, in 2022, the remuneration of professional drivers in your company:





In four out of ten employers, drivers' wages increased by 10% to 20%. This aligns with what drivers said, as the average net amount of total wages increased by 21.6% year-on-year.





5. Do drivers like their job or are they thinking about switching?

Considering the earnings of professional drivers regardless of the type of routes they operate on, it might appear that they earn significantly more compared to warehouse workers or forklift operators in the logistics industry. And it would seem that it is the salary that attracts them to this profession. But is that really the case?

The Polish Road Transport Institute teamed up with InPost, TVM Transport and Transsped to launch the “Respect My Way” campaign, which seeks to encourage young people to pursue a career as a driver. We aim to demonstrate that while the profession may not be the easiest, it offers several advantages. It is a fulfilling job for individuals who value freedom and enjoy traveling. The website <https://respectmyway.pl/> has a “Testimonials” tab that provides numerous firsthand accounts from women and men working in this challenging profession. In response to the question “why do you enjoy your job?” the most common answers are “passion” for trucks, the desire to travel, and freedom. So, what did our respondents say?

The results may come as a pleasant surprise to many. However, to arrive at a comprehensive analysis of the results, we also checked the correlation with the median earnings, and there were no surprises in this regard. The lower the salary, the lower the job satisfaction. The difference in median net earnings for individuals who reported job dissatisfaction in 2022 is only PLN 200 lower. In 2021, it was PLN 800.

Do you like your job?



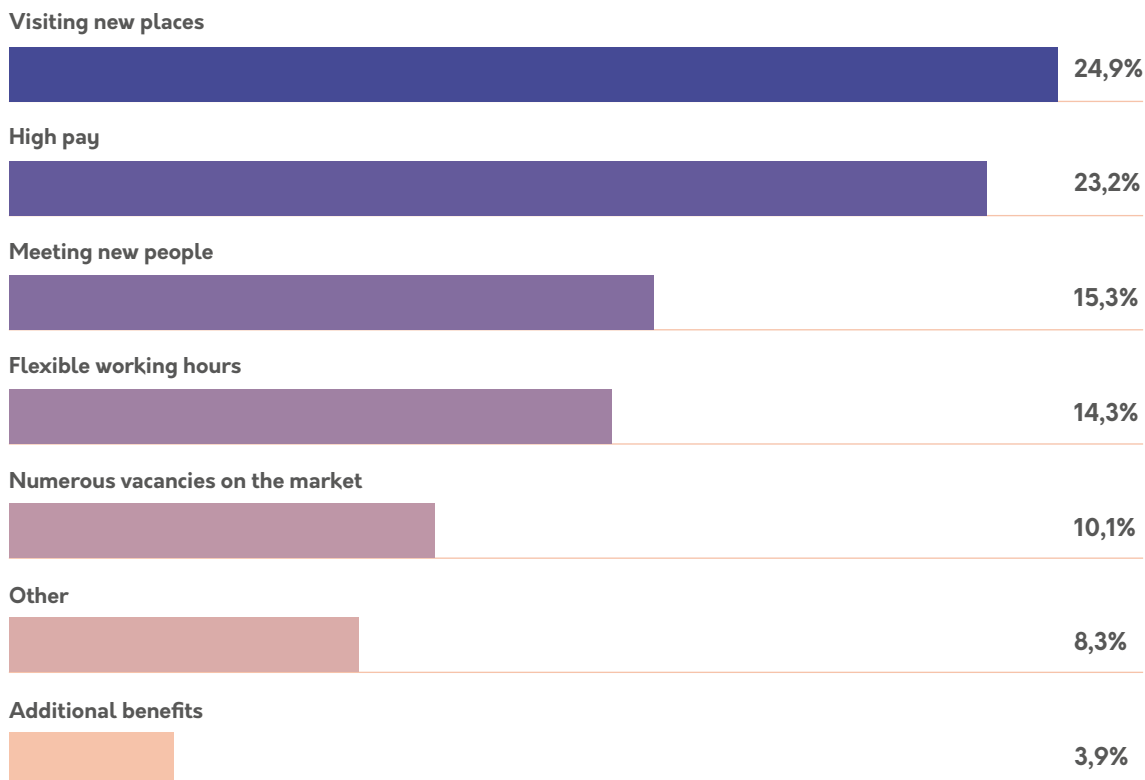
*median net earnings

Eight out of ten drivers stated that they enjoy their job. This marks an increase of a few percent compared to the previous year. The shortage of drivers is increasing year by year, not only in Poland but in Europe as well. Improved working conditions for drivers can increase job satisfaction, ultimately benefiting everyone. It is important to remember that drivers are responsible for ensuring that goods are stocked on store shelves every day, and people outside the industry often overlook or underestimate their contributions.

5.1 What do drivers like and dislike about their job?

We already know that drivers enjoy their job, but it's worth exploring which aspects of the job they like the most. In this case, drivers were allowed to select more than one answer.

What do you like about your job most?



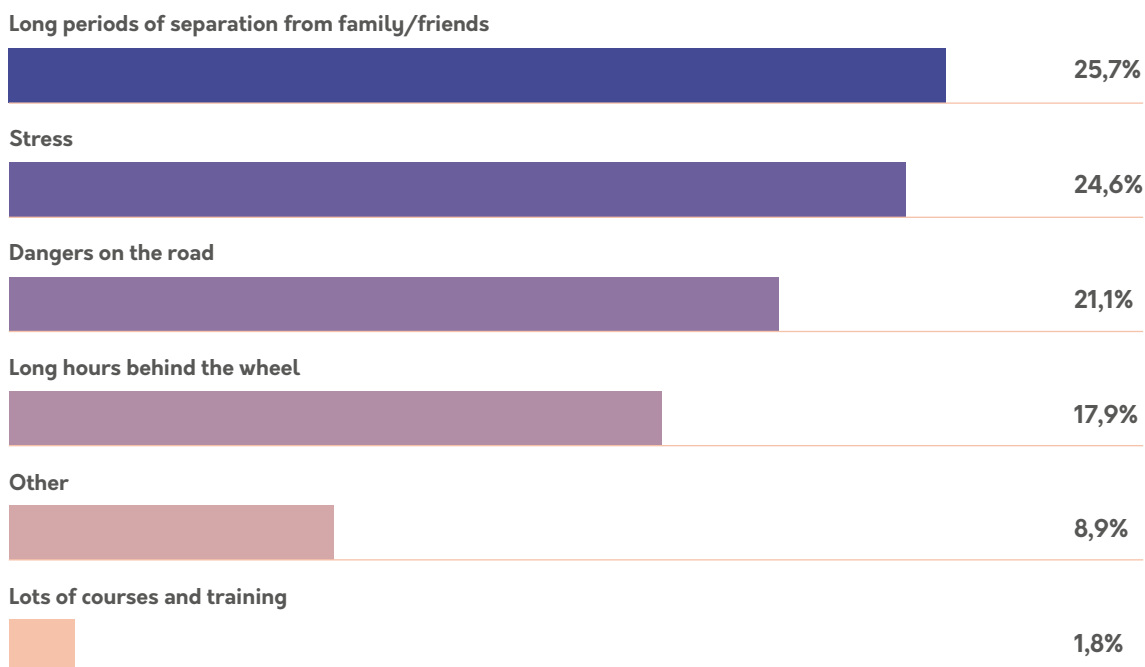
Visiting new places has been the top answer in our research for several years now. For the past three years, there has been no significant change in the distribution or ranking of answers, with only slight variations in the values reported. According to our survey, drivers enjoy their job most for the opportunity to explore new places, while benefits are among the least liked aspects of the profession. This finding is not particularly surprising, especially in the context of the earnings of drivers in comparison to other professions. In 2018, nearly half of the drivers indicated that the opportunity to visit new places was the most important aspect of their job. However, in 2022, only one-fourth of the surveyed drivers share this opinion.

Flexible working hours and the opportunity to meet new people were among the next most commonly cited reasons why drivers enjoy their job. Respondents also appreciate the fact that there is currently a high demand for drivers, resulting in numerous job opportunities on the market. This situation provides drivers with a sense of psychological comfort and greater job security, which in turn contributes to a greater sense of personal

freedom. Among the “other” reasons cited by drivers, some mentioned “tranquility”, “I enjoy driving trucks,” while others simply said, “because it’s my passion”. They value peace, having no “boss looking over their shoulders”, the “family work atmosphere”, and “having no targets”, or the fact that thanks to this job, they can be at home a lot and spend time with their families.

Drivers are the least interested in benefits (only 3.9% of respondents). This begs the question: why is that the case? In our opinion, the benefits for drivers are mismatched. This year, we also asked drivers and employers about the benefits offered to drivers, and we will discuss the details of those findings further in the report.

What do you dislike about your job?



Drivers could select multiple answers to this question. The responses about what drivers dislike about their work are not surprising. **Family is often considered to be the most important thing in people’s lives. As such, it’s not surprising that separation from loved ones and long driving hours are drivers’ greatest challenges.** This is rather expected, as 61% of respondents declared that they engage in international transport. In addition, it is a job that can be quite stressful. Since 2020, stress has moved to the second position. **Dangers on the road rank only third.** This may be attributable to the spread of telematic systems that enhance safety and driving comfort. Among the “other” answers, the most frequently mentioned concerns were danger and theft in car parks, enhanced inspections by various services, boredom, low wages, long waiting times for unloading and loading, lack of parking spaces to rest, and the pressure of “racing against time”. There were also answers about dangers and thefts in parking lots.

This year, drivers did not mention great animosity towards their profession or a lack of respect on the roads as significant challenges, both of which were frequently brought up in previous years. However, just because these issues were not mentioned as significant challenges in the survey, it does not necessarily mean they do not



exist. Thus, we should avoid drawing far-fetched conclusions. In previous years, some drivers also complained about the low base pay under the “other” category. Apart from some “low pay” responses, most drivers seem happy with their salary. **As a reminder, only 20% of drivers reported not liking their job, which is why there are relatively few answers regarding job dissatisfaction.** In previous years, there were reports of mobbing being an issue among drivers, but such complaints seem to have subsided now.

It may appear that their marital status could affect drivers’ job satisfaction. **Our research does not confirm that, as 80% of both unmarried and married drivers expressed satisfaction with their job.**

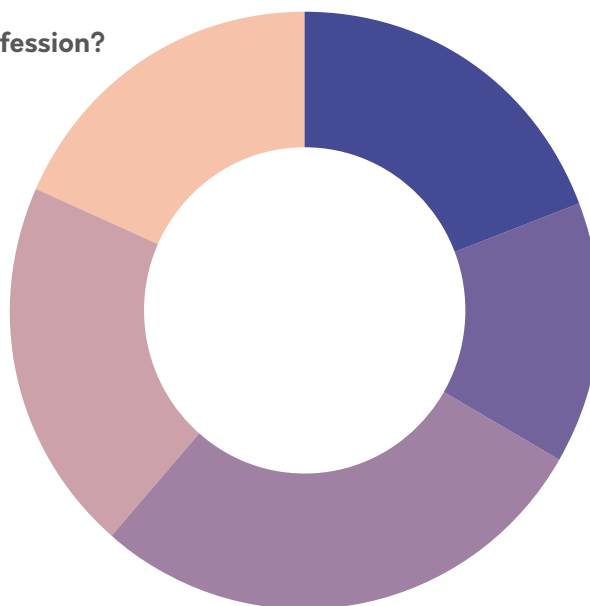
5.2 Are drivers thinking about switching professions?

Job satisfaction and workplace well-being play crucial roles in determining how well drivers perform their duties and the level of commitment they bring to their tasks. It is essential for drivers to feel like they are a part of the company and appreciated. This helps to ensure that they are committed to their work and do not consider leaving their job. This is particularly important given that the TFL industry has struggled with a driver shortage for years. So, what do our respondents think?

Are you thinking about changing your profession?

Not at all 8100 PLN*	19%
Very rarely 8000 PLN*	14%
Rarely 7800 PLN*	28%
Often 7000 PLN*	20%
Very often 6450 PLN*	18%

**net median

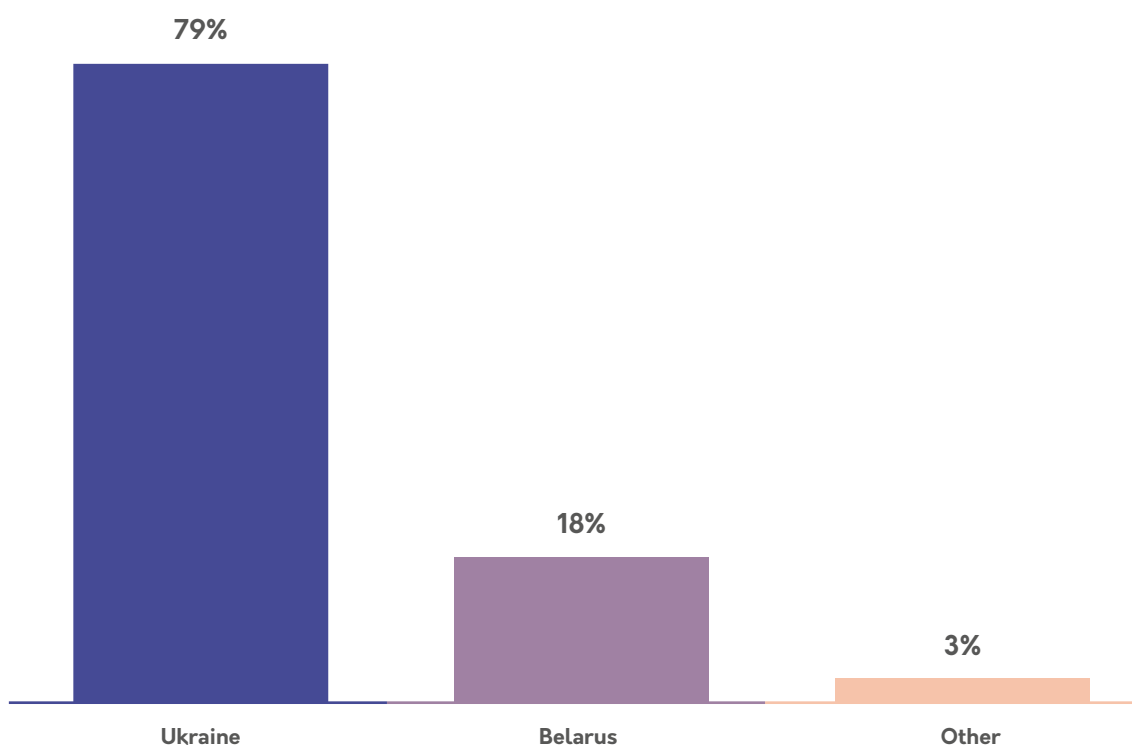


38% of drivers think about changing their profession often or very often. This is 12% less than in the previous year. Importantly, the trend is correlated with earnings. Those with the lowest income are most likely to quit. This should be a warning signal for employers already struggling with a lack of specialists in the labor market. Additional resignations will only exacerbate the problem. By that, we do not mean only raising the amounts of salaries but introducing other changes as well. As we showed in Section 5, drivers value visiting new places and meeting new people over a high salary. Thus, more consideration should be given to additional benefits and a positive atmosphere.

6. Labor market of drivers in road transport

Without a doubt, we currently have an employee market. This is particularly true for the transport industry, which is struggling with a workforce shortage. **According to the estimates of Transport Intelligence analysts, there is a shortage of 124,000 drivers in Poland. The outbreak of the war in Ukraine only exacerbated the issue. According to the Main Inspectorate of Road Transport (GITD), in 2021 there were 103,766 Ukrainian drivers' certificates in Poland.** In 2022, the number of drivers holding Ukrainian licenses expanded to 127,389, which constitutes 79% of all drivers in Poland. As we are well aware, and as hauliers also attest, many drivers from Ukraine returned to their homeland to defend it shortly after the start of the war. Mobilization regulations and travel restrictions also limit the influx of further drivers. The shortage may be further exacerbated by the sanctions imposed on the aggressor countries of Russia and Belarus (which supports Russia). It is worth mentioning that Belarusians were the second-largest nation of drivers working in Poland. According to GITD, in 2021, Belarusians held 28,496 driver's licenses, accounting for 18% of all foreign drivers in Poland.

Driver's certificates in 2022



So we asked employers what conditions they offer drivers, and whether they have issues with finding employees.



Maciej Maroszyk,
Operations Director,
TC Law Office

The growing shortage of professional drivers in the road transport industry is driven by a variety of factors. These factors include extended periods spent behind the wheel, health consequences associated with the profession, and the aging of the current workforce.

Hiring drivers from other countries, particularly from across the eastern border, may help alleviate this issue, but it will not completely resolve the problem. The advantage of this solution lies in the potential for acquiring new, often more affordable, employees. However, the complex and multi-stage process of verifying professional competencies and the high costs of obtaining mandatory benefits prolong the period during which carriers are left without a workforce.

Therefore, carriers must find effective strategies to attract more young, licensed drivers. If not addressed, the shortage could significantly impact the future growth and development of the sector.



Jakub Szatek,
Trans.eu expert

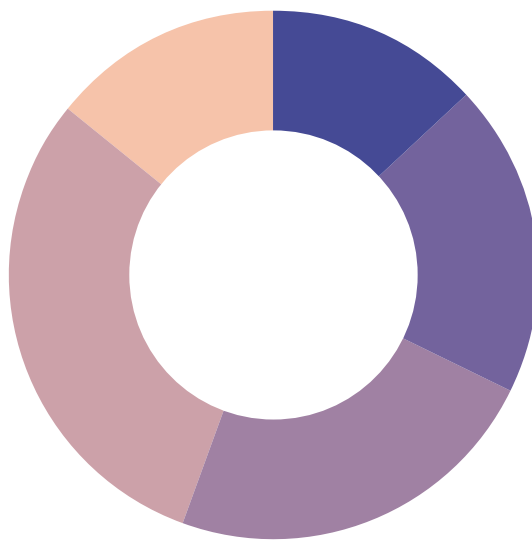
Despite the decline in demand for transport services, the shortage of drivers remains one of the most significant challenges in the industry. Due to the conflict in Ukraine and the depletion of non-EU markets that previously benefited from procedural facilitations (such as Ukraine, Belarus, Moldova, Georgia, and Armenia), carriers are now seeking solutions further afield. Larger industry players are making efforts to recruit workers from Asian countries, including Kazakhstan, Indonesia, India, and the Philippines. Given the magnitude of the driver shortage, it is essential to optimize route planning, minimize empty runs, and manage human resources effectively, as a long-term solution is unlikely to emerge in the near future.

6.1. Is it easy to find a professional driver for work?

Nearly half of the surveyed employers reported having issues with hiring a driver. Compared to 2021, this is a downward trend (12% less). Only three in ten employers have no difficulty finding drivers. So how much time is needed to find the right candidate?

Do companies have trouble finding drivers?

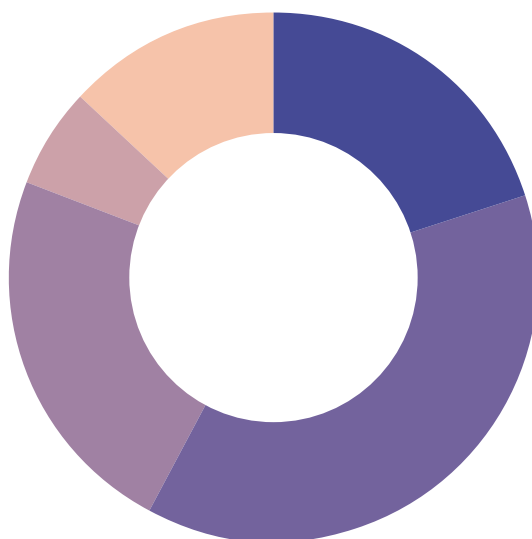
Definitely not	13%
Rather not	19%
Hard to say	23%
Rather yes	30%
Definitely yes	14%



Most often, carriers said between 1 and 3 weeks. Nearly 1/4 of employers admit finding a driver takes 3 to 6 weeks. One in five employers chose the shortest option of “less than one week”. With each passing year, this situation changes dynamically in favor of either drivers or employers.

How long does it take to find a driver?

Up to 1 week	20%
From 1 to 3 weeks	38%
From 3 to 6 weeks	23%
From 6 to 8 weeks	6%
Over 8 weeks	13%





Dawid Dołiński,
CEO of DOL-TRANS-TOUR

Finding new bus drivers can be quite challenging. We manage to acquire most of our drivers through paid referrals from our existing drivers. There seems to be a shortage of young people interested in entering the market, which is why we offer subsidies for D-category driving license training. We have also noticed a subtle trend of drivers shifting away from goods transportation, as they prefer not to sleep in cabins and work long hours. The job of bus drivers, particularly tour bus drivers, tends to be somewhat slower-paced, and providing single rooms for drivers has now become the standard during trips.

6.2 Turnover in transport companies

Four out of ten employers reported having no issues with driver turnover in 2022. The situation was similar in 2021, with three out of ten employers saying that they experienced it, but it did not hinder their business operations.

One in five employers reported that the turnover of drivers negatively affects their company's ability to fulfill orders, resulting in a loss of business due to fewer orders. This is a warning signal.

Does your company have a problem with driver turnover? If so, how does it affect the business?

We have no issue with turnover



We are seeing turnover, but it does not hinder ongoing operations



We are seeing turnover and it negatively affects the execution of orders



We are seeing turnover that leads to loss of business due to fewer orders



I have no opinion



Employers also shared with us how the shortage or turnover of drivers affected other aspects of their company's operations. Positive impacts include reduced downtime, lower incidence of fines and infractions, and decreased fuel and e-TOLL expenses. On the other hand, the negatives are lack of business development, inflexibility in vehicle planning, reduced service quality (due to delays in deliveries), separation of double-manned crews, idle vehicles and lower business revenues.

Our study also examined **where employers most commonly search for professional drivers and which methods yielded the best results**. We asked about the latter for the second time, listening to the voices of our readers. Employers could provide multiple answers to this question.

Where do carriers look for professional drivers?

Which channels yield the best results?



. In 2018, half of the carriers were looking for drivers on job portals. In the following years, however, this share slightly decreased. **Currently, employers most often look for drivers on job portals and based on other drivers' recommendations . These two methods also yield the best results.** On the other hand, press ads are losing popularity. The same applies to truckside ads.



Dawid Doliński,
CEO of DOL-TRANS-TOUR

We have a very low employee turnover rate of around 1%, thanks to the family-like atmosphere within our company. We employ approximately 25 drivers, and we make an effort to engage with each of them, building relationships and emphasizing open communication to address any issues as they arise. However, due to the shortage of drivers and restrictive working hours for drivers, even a single resignation can have a major impact on our business.



7. Labor market in the TFL industry

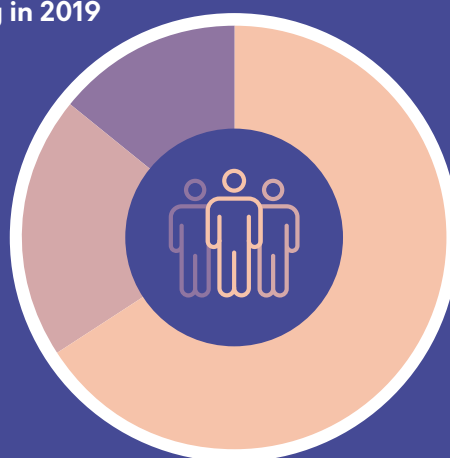
The most recent data on the labor market in the TFL sector comes from 2021. In late 2021, in Poland, the PKD (Polish equivalent of NACE) sector of Transport and Warehouse Management employed 950.6 thousand people. It is the 3rd largest professional group in the service sector. Employment in this sector is the highest in the Lubuskie and Zachodniopomorskie provinces and lowest in the Podkarpackie province (2021). This is mainly due to Poland's geographical location, as most transport services (37.1%) are provided by Polish road transport companies, which account for as much as 70% of all transport services.

Structure of employees in Poland in the TFL industry in 2019

480 thousand people – road transport of goods

147 thousand people – storage

102 thousand people – postal and courier companies



Road transport of goods

Poland 51,3%

European Union 31,5%

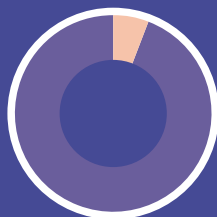


Source: European Commission 202



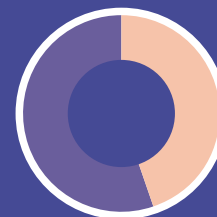
951 thousand
employees in
the TFL industry
(2021)

5,7%
of GDP in 2021
was generated
by the TFL industry



355 billion
tonne-kilometers
were transported
by the Polish
TFL industry

44%
of the Polish
logistics market
is full truckload transport
(compared to 10%
in the entire EU)



Own study based on: Branża TSL w obliczu automatyzacji i wojny, Polish Economic Institute, Policy Paper, 4/2022.

Logistics Director

Key tools

- **Supply chain management (SCM) systems:** facilitate the management of logistics processes, including planning deliveries, monitoring inventory, and controlling costs
- **Data analysis and reporting software:** enable data analysis and creation of reports on the efficiency and effectiveness of logistics processes
- **Delivery route monitoring and optimization systems:** help plan optimal delivery routes, leading to improved efficiency and cost savings
- **Customer communication management tools:** support good communication with customers and ensure a continuous exchange of information about the status of orders and shipments

Key skills:

Familiarity with logistics processes

- transportation
- warehousing
- supply chain management and quality control

Analytical and strategic skills

- data analysis
- creating effective strategies
- optimizing and enhancing the efficiency of logistics processes

Team management skills

- managing a multi person team
- inspiring and motivating the team to achieve goals and constantly improve qualifications

Negotiation and relationship-building skills

- negotiating
- building lasting relationships with customers, suppliers and business partners.

Planning and organization skills

- planning elements, i.e. delivery schedule
- storage, transportation and inventory management
- improving the performance of the reporting unit

Communication and presentation skills

- presenting cost reports, results and the performance of the logistics department
- presenting new ideas and strategies

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 20,000 gross

HO – PLN 30,000 gross

Maximum – PLN 35 000 gross

Sample career path:

- Regional Logistics Director
- Chief Operations Officer
- CEO
- Independent Consultant*

*A Logistics Director may consider becoming an independent logistics consultant offering consulting services to various companies

Logistics Manager

Key tools

- **Supply Chain Management (SCM) systems:** supply chain management tools such as SAP, Oracle and others to monitor and optimize logistics processes
- **Planning and forecasting systems:** production scheduling and inventory planning tools to ensure adequate supply and prevent shortages of components, parts, etc.
- **Transport optimization systems:** route planning and transport cost optimization tools to reduce delivery costs and minimize empty runs
- **Warehouse management systems:** tools for stock-taking, monitoring product movement and managing warehouse space.
- **Data analysis software:** Microsoft Access and other analytical programs to facilitate a comprehensive overview of logistics processes and making informed business decisions

Key skills:

Familiarity with the logistics industry

- familiarity with and experience in the logistics industry and supply chain

Familiarity with logistics processes

- transportation
- warehousing
- supply chain management

Analytical skills

- data analysis (data analysis, processing and interpretation)
- decision-making
- solving logistics problems

Planning and organization skills

- planning elements, i.e. delivery schedule
- storage, transportation, inventory management

Communication and negotiation skills

- negotiating
- communicating with the team, customers, etc.
- building lasting relationships with customers, suppliers and other internal units.

Team management skills

- delegating tasks
- resolving conflicts
- communicating with employees at various levels within the organization and in varying situations

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 13,000 gross

HO – PLN 18,000 gross

Max – PLN 20,000 gross

Sample career path:

- Logistics Director
- Supply Chain Manager

Logistics Specialist

Key tools

- **Supply chain management (SCM) systems:** SAP, Oracle, Microsoft Dynamics and others
- **Demand planning and forecasting systems:** Demantra, SAP APO, i2 Technologies and others
- **Warehouse management systems:** WMS (Warehouse Management System)
- **Delivery route planning and optimization systems:** TMS (Transportation Management System)
- **Delivery monitoring and tracking systems:** GPS, electronic tracking and others
- **Data analysis software:** Excel, PowerBI, Tableau and others

Key skills:

Familiarity with logistics processes

- supply chain management
- warehousing
- transportation and distribution

Analytical skills

- data analysis (data analysis, processing and interpretation)
- decision-making

Negotiating skills

- negotiating with customers and suppliers (prices and other terms)
- communicating with the team, customers and suppliers

Project management skills

- managing logistics projects
- coordinating team activities

Ability to work in difficult conditions

- working under time pressure
- handling difficult situations

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 7,500 gross

HO – PLN 8,500 gross

Maximum – PLN 10,000 gross

Sample career path:

- Logistics Manager
- Supply Chain Manager
- Warehouse Manager
- Transport Manager

Transport Manager

Key tools

- **IT systems for fleet management:** support monitoring of vehicles, their locations, routes and cargo movement schedules
- **Systems supporting route planning:** facilitate optimal route planning and delivery scheduling, taking into account time, costs and vehicle availability
- **Inventory management systems:** enable tracking of inventory levels, deliveries and demand, allowing for more effective transport planning
- **Electronic invoice processing systems:** facilitate the automation of the invoicing process and settling accounts with customers
- **Services quality monitoring tools:** support tracking of the quality and reliability of transport services, which is necessary to maintain high-quality customer service

Key skills:

Familiarity with the transport sector

- basic definitions and regulations applicable to transport
- trends and modern technologies
- up-to-date knowledge of changes in regulations

Planning and organization skills

- effective planning
- reacting quickly to changes

Negotiation and relationship-building skills

- negotiating
- communicating with the team
- building lasting relationships with customers, suppliers and business partners

Ability to work in difficult conditions:

- working under time pressure
- making difficult decisions under time pressure
- taking responsibility for decisions made
- conflict resolution skills

Team management skills

- managing a multi-person team
- achieving set goals with the team

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 11,000 gross

HO – PLN 15,000 gross

Maximum – PLN 18,000 gross

Sample career path:

- Transport Director
- Transport Business Development Manager
- Own transportation business

Kierownik spedycji

Key tools

- **Systemy transportowe i logistyczne**, tj. TMS (Transportation Management System), ERP (Enterprise Resource Planning), które umożliwiają planowanie, koordynowanie tras i harmonogramu transportu, a także pozwalają zarządzać procesami logistycznymi.
- **Narzędzia do komunikacji**, tj. poczta elektroniczna, telefon (smartfon), komunikatory internetowe, aby móc skutecznie i szybko współpracować z klientami, dostawcami i pracownikami.
- **Mapy i narzędzia nawigacyjne**, tj. Google Maps, pozwalają śledzić i wyznaczać najlepsze trasy do wykonania transportu.
- **Programy do fakturowania i rozliczania**, tj. QuickBooks, które pozwalają skutecznie rozliczać i monitorować koszty transportu.
- **Programy do analizy danych**, tj. Excel, aby móc analizować dane dotyczące transportu i wyznaczać kierunki rozwoju dla swojej firmy.

Key skills:

Wiedza nt. branży transportowej

- znajomość podstawowych definicji, regulacji w transporcie
- wiedza o trendach, nowoczesnych technologiach
- aktualna wiedza nt. zmian w przepisach

Umiejętność planowania i organizacji

- umiejętność efektywnego planowania procesów logistycznych
- umiejętność szybkiego reagowania na zmiany

Umiejętność komunikacji i budowania relacji

- umiejętność prowadzenia negocjacji z klientami,
- przewoźnikami, kierowcami i innymi działami w firmie
- umiejętność komunikacji z zespołem
- umiejętność budowania trwałych relacji z klientami

Umiejętność pracy w trudnych warunkach:

- umiejętność pracy pod presją czasu
- umiejętność podejmowania trudnych decyzji w krótkim czasie
- branie odpowiedzialności za podjęte decyzje

Umiejętność pracy w zespole

- zarządzanie wieloosobowym zespołem
- osiągnięcie z zespołem wyznaczonych celów

Salary: [podano kwoty brutto. Min – minimalna; ON – oferowana najwyższa; Max – maksymalna]

Min – 9 000 zł brutto

ON – 15 000 zł brutto

Max – 20 000 zł brutto

Sample career path:

- Kierownik transportu
- Branch manager
- Własna firma spedycyjna

Spedytor

Key tools

- **Systemy zarządzania transportem** tj. TMS (Transportation Management System) pozwalają na śledzenie pojazdów i ich ładunków, umożliwiając spedytorowi planowanie tras i przydzielanie zleceń kierowcom.
- **Narzędzia do komunikacji**, tj. poczta elektroniczna, telefon (smartfon), komunikatory internetowe, aby móc skutecznie i szybko współpracować z klientami, dostawcami, kierowcami i pracownikami.
- **Programy do analizy danych** umożliwiają spedytorowi wizualizację danych, takich jak koszty i czas, co pozwala na lepsze planowanie i optymalizację tras.
- **Narzędzia do zarządzania dokumentami** umożliwiają łatwe przechowywanie i udostępnianie dokumentów, tj. faktury, umowy i inne ważne dokumenty, co umożliwia efektywne i optymalne prowadzenie biznesu.
- **Systemy wymiany danych (EDI)** umożliwiają spedytorowi automatyzację i ujednolicenie procesów, takich jak fakturowanie i rozliczanie, co pozwala na zwiększenie efektywności i obniżenie kosztów.
- **Znajomość giełd/ platform transportowych**: Trans.eu, Timocom, Wtransnet, Teleroute, Transporeon

Dzięki znajomości tych platform, spedytor może łatwiej i skuteczniej realizować swoje zadania, takie jak: wyszukiwanie dostępnych środków transportu, negocjowanie cen i warunków przewozu, monitorowanie przemieszczeń towarów i nawiązywanie kontaktów z innymi uczestnikami rynku

Key skills:

Wiedza nt. branży transportowej

- znajomość podstawowych definicji, regulacji w transporcie
- wiedza o trendach, nowoczesnych technologiach
- aktualna wiedza nt. zmian w przepisach
- znajomość prawa transportowego, a w szczególności:
 - przepisów dotyczących odpowiedzialności za przemieszczanie towarów
 - znajomość możliwości technicznych i regulacyjnych transportu
 - morskiego, lotniczego, kolejowego i drogowego

Umiejętność komunikacji i budowania relacji

- umiejętność prowadzenia negocjacji z klientami,
- przewoźnikami, kierowcami i innymi działami w firmie
- umiejętność komunikacji z zespołem
- umiejętność budowania trwałych relacji z klientami

Umiejętność planowania i organizacji transportu

- umiejętność efektywnego planowania transportu
- umiejętność szybkiego reagowania na zmiany

Umiejętność pracy w trudnych warunkach:

- umiejętność pracy pod presją czasu
- umiejętność podejmowania trudnych decyzji w krótkim czasie
- branie odpowiedzialności za podjęte decyzje

Salary: [podano kwoty brutto. Min – minimalna; ON – oferowana najwyższa; Max – maksymalna]

Min – 6 000 zł brutto

ON – 8 500 zł brutto

Max – 10 000 zł brutto

Sample career path:

- Kierownik spedycji
- Branch manager
- Business development manager

Warehouse Manager

Key tools

- **Warehouse management systems (WMS):** facilitate tracking of the movement of goods, stock-taking and inventory planning
- **Systems for monitoring and optimizing delivery routes:** facilitate the planning of optimal delivery routes, allowing for improved efficiency and cost reductions
- **Data analysis and reporting software:** Excel, Access and others; these tools support data analysis and generating reports on the efficiency and effectiveness of warehouse processes.
- **Barcode scanning and reading equipment**

Key skills:

Familiarity with warehouse processes

- basic logistics processes
- inventory management and goods turnover
- warehouse operations and trends
- basic labels and barcodes

Planning and organization skills

- planning and organizing logistics processes
- working under time pressure
- making key decisions under time pressure
- improving the performance of the reporting unit
- team management to ensure efficient use of resources and time

Familiarity with OHS regulations

- basic occupational health and safety, and environmental protection regulations
- procedures

Operating equipment and machinery

- forklifts
- storage racks
- computers
- scanners

Analytical skills

- data analysis
- compiling reports
- optimizing and increasing the efficiency of warehouse processes

Team management skills

- managing a multi-person team
- achieving set goals with the team
- making difficult decisions
- resolving conflicts

Familiarity with technologies

- latest technologies
- tools optimizing warehouse operations and ensuring a higher level of security

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 11,000 gross

HO – PLN 13,000 gross

Maximum – PLN 15,000 gross

Sample career path:

- Logistics Manager
- Operations Manager in a distribution center
- Distribution center director

Distribution Center Director

Key tools

- **Warehouse management IT systems:** SAP, Oracle WMS and Microsoft Dynamics
- **Human resources and order management tools:** Microsoft Excel and Project
- **Barcode scanning and reading equipment**
- **GPS and navigation systems:** including specialized warehouse navigation and distribution software
- **Communication tools:** email, telephone (smartphone), instant messengers; facilitate working with customers, suppliers, drivers and employees effectively and quickly

Key skills:

Familiarity with warehouse processes

- basic logistics processes
- inventory management and goods turnover
- warehouse operations and trends
- basic labels and barcodes

Team management skills

- managing a multi-person team
- achieving set goals with the team
- making difficult decisions
- resolving conflicts

Familiarity with technologies

- latest technologies
- tools optimizing warehouse operations and ensuring a higher level of security
- trends in logistics and robotic warehouse automation

Analytical skills

- data analysis
- compiling reports
- optimizing and increasing the efficiency of warehouse processes

Planning and organization skills

- planning and organizing of logistics processes
- working under time pressure
- making key decisions under time pressure

Negotiation and communication skills

- negotiation
- building lasting relationships with customers, suppliers and business partners
- communicating with the team and resolving conflicts

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 20,000 gross

HO* – PLN 24,000 gross

Maximum – PLN 30,000 gross

Sample career path:

- Regional Director – responsible for several distribution centers
- CEO – the distribution center director may eventually become the CEO to lead the entire organization and be responsible for its overall strategy and success.

Warehouse worker

Key tools

- **Barcode scanner:** allows for quick and accurate input of information about products and their locations.
- **Warehouse management system (WMS):** facilitates tracking and controlling inventory levels, registering receipts and releases, and managing transport orders
- **Support for storage devices:** manual or automatic pallet jack that help move loads or pallets; storage racks for storing products; toolboxes and manual tools facilitate everyday warehouse work, such as packing and storing products
- **Communication tools:** e-mail, telephone (smartphone) and computer

Key skills:

Familiarity with safety rules

- basic occupational health and safety, and environmental protection regulations
- procedures
- rules for storing individual groups of goods in the right order and conditions

Organization and planning skills

- planning and effective time management in the warehouse

Precision and accuracy

- inputting accurate information concerning the warehouse
- keeping the warehouse tidy and clean
- precise and accurate work

Teamwork skills

- working with other warehouse employees and other company departments

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 3,500 gross

HO* – PLN 4,200 gross

Maximum – PLN 5,000 gross

Sample career path:

- Forklift Operator
- Warehouse Shift Manager
- Warehouse Manager

Forklift operator

Key tools

- **Forklift:** the operator should be familiar with the design and operation of the forklift, including its braking system, drive system and controls
- **Safety features:** the operator should be familiar with and use the various safety features such as wheel locks and hitches to ensure work and goods safety
- **Gauges and control lights:** the operator should be able to read and interpret gauges and control lights on the forklift, such as the battery level, oil pressure and motor temperature gauges
- **Measuring instruments:** the operator should be and be able to use various measuring instruments, such as calipers and squares, to measure the dimensions of loads and storage shelves accurately

Key skills:

Precision and accuracy

- proper movement coordination
- maneuvering the forklift and loads safely and with precision
- precise and accurate work
- working under time pressure and stressful conditions
- correctly reading and interpreting maps and markings in the warehouse and the entire workplace

Readiness to do physical work

- lifting and moving loads manually
- keeping the warehouse tidy and clean

Familiarity with safety rules

- basic occupational health and safety, and environmental protection regulations
- procedures
- rules for storing individual groups of goods in the right order and conditions

Office of Technical Inspection licenses

- Office of Technical Inspection exam to operate forklifts

Communication skills

- effective communication with other employees and departments

Ability to learn and adapt

- learning quickly
- reacting and adapting to changes in procedures and technology

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 4,100 gross

HO* – PLN 4,900 gross

Maximum – PLN 5,500 gross

Sample career path:

- Warehouse Shift Manager
- Warehouse Manager
- Logistics Specialist

Dispatcher

Key tools

- **Dispatch management systems:** help plan and monitor the availability of resources such as employees, vehicles, equipment and materials
- **Telematic systems and maps:** allow dispatchers to track the location of vehicles and set routes
- **Data analysis software:** facilitates calculating costs and analyzing data
- **Communication tools:** email, telephone (smartphone), two-way radios and wireless communication systems, and instant messengers; these tools facilitate effective and quick cooperation with customers, suppliers and employees
- **Ticket and incident management software:** allows dispatchers to record and track incidents such as accidents, breakdowns or traffic incidents
- **Monitoring and reporting software:** supports dispatchers in monitoring and reporting data such as performance and free resources
- **Mobile apps** – allow dispatchers to access information and tools in the field

Key skills:

Planning and organization skills

- planning effectively
- reacting quickly to changes
- coordinating several units simultaneously

Ability to work in difficult conditions

- working under time pressure
- making difficult decisions under time pressure
- taking responsibility for decisions made

Ability to communicate and build relationships

- negotiating with carriers, drivers and other departments in the company
- communicating with the team
- building lasting relationships with customers, suppliers and business partners

Familiarity with technologies

- latest technologies necessary at work

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 4,800 gross

HO* – PLN 6,200 gross

Maximum – PLN 7,800 gross

Sample career path:

- Shift Manager
- Head of the Dispatch Department
- Transport Manager

Transport specialist

Key tools

- **Transport management systems (TMS):** facilitate planning, monitoring and tracking of transports, as well as provide information on the availability of vehicles and loads
- **Route optimization software:** supports planning optimal travel routes, taking into account time, distance and costs
- **Fleet management software:** assists in managing the fleet of vehicles, including monitoring their technical condition and maintenance
- **Invoicing and billing software:** e.g. QuickBooks; which facilitates effective settlement and monitoring of transport costs
- **Data exchange systems (EDI):** enable automatic data exchange between companies and facilitate the process of sending information about transports. These programs facilitate invoice generation and settlement of transport costs

Key skills:

Familiarity with the transport sector

- basic definitions and regulations applicable to transport
- trends and modern technologies
- up-to-date knowledge of changes in regulations
- analysis and presentation of transport data

Planning and organization skills

- planning and coordinating transport routes taking into account time, costs and safety

Communication and relationship-building skills

- negotiating with carriers, drivers and other internal units
- communicating with the team

Ability to work in difficult conditions

- working under time pressure
- making difficult decisions under time pressure
- taking responsibility for decisions made

Salary: [gross amounts, HO – highest offered]

Minimum – PLN 5,200 gross

HO – PLN 7,500 gross

Maximum – PLN 9,000 gross

Sample career path:

- Transport Manager
- Industry Expert: A transport specialist can develop their career as an industry expert and advisor to companies in planning and coordinating transport routes.
- Business owner: a transport specialist can also set up their own company for planning and coordinating transport routes.



Patryk Grygiel,
Manager Michael Page
Logistics & Sales

1. What is the current employment landscape in the TFL industry? Should the industry be concerned about anything? Is it worthwhile to invest in professional development in this field?

The TFL industry has experienced significant volatility in recent years, largely due to restrictions on international trade and production downtime caused by the pandemic. These factors have negatively impacted transport and logistics services, resulting in decreased demand and companies being forced to cut jobs. The industry faced additional challenges due to the conflict in Ukraine. While the market is slowly stabilizing, it still has a long way to go before returning to normal. However, it is worth noting that the TFL industry is a crucial part of the economy and plays an essential role in international trade, making it a field that offers promising career opportunities.

2. Is there a risk that artificial intelligence, such as ChatGPT, will eliminate jobs in the TFL industry?

Artificial intelligence is likely to be utilized for automating processes such as route planning, vehicle fleet monitoring, and predicting delivery times. However, it is important to remember that AI will not be able to fully replace human beings, particularly in areas such as strategic decision-making, client relationship-building, and problem-solving. Throughout history, the introduction of new technologies has repeatedly created greater opportunities for people, and I believe it will be the same in this case as well.

3. What are the current employment trends in the TFL sector, and what types of jobs are likely to emerge or be replaced by automation or robots?

As operating costs continue to rise and competition remains fierce, companies may be compelled to adopt new technologies that enable them to gather more information. Consequently, businesses will seek analytical competencies that enable them to leverage data to optimize their processes. Another critical skill in a dynamically changing market is the ability to establish strong business relationships, enabling companies to stay informed about the current needs of their



customers and anticipate changing expectations. It's crucial to remember that the world is increasingly focused on environmental sustainability, which is why more and more companies will require competencies related to environmental protection and CO2 reduction. As a result, in the coming years, the TFL industry is likely to see the emergence of roles such as data analysts and sustainable logistics specialists. Businesses will likely seek to address staffing challenges through robotics and artificial intelligence. With the advancement of autonomous vehicle technology, the demand for truck drivers may decrease. Some companies are already leveraging packaging robots or sorters to reduce their dependence on warehouse workers. As a result, there are fewer job openings for forklift drivers, as some processes are now being handled by autonomous forklifts.





Summary

The transport sector experienced significant instability in 2022, as the outbreak of war led to an outflow of drivers from Ukraine, deepening the workforce shortage. In the second half of the year, economic turbulence, rising fuel prices, and soaring inflation compounded these challenges. All these trends increased wage pressures in the economy.

Six out of ten drivers reported an increase in their salaries compared to 2021. Wages decreased only for 6% of respondents. These studies were conducted just one year after the implementation of the Mobility Package, which raised drivers' base pay. Contrary to various experts' dire predictions of significant changes to drivers' employment status, employment contracts continued to dominate. As many as 91% still declare that they work under this traditional form of employment. For professional truck drivers, the average base pay is PLN 4,399, and the median net amount was PLN 3,500. Next year, as we have already done six times, we will check whether these conditions have changed.

Another study conducted by the Polish Road Transport Institute confirms that nearly eight out of ten drivers enjoy their work. Interestingly, high earnings are not the primary factor underlying job satisfaction. While salaries are important, the opportunity to discover new places was cited as the leading reason for job enjoyment. Salary came in second place.

However, one disturbing trend in times of an employee's market and workforce shortage is the low share of additional benefits intended to motivate drivers to work or remain with a given company. According to drivers' statements, as many as 68.5% do not receive any benefits. The ones they get are rather common and quite typical, like a business phone. Drivers would like to receive a commuting allowance and additional insurance, but unfortunately, as many as one in four employers openly acknowledge that they do not provide their drivers with any benefits beyond their basic salary. If they do offer something, it is mainly additional insurance or a company phone for personal use. Additional private medical care is at the bottom of the list, which is unfortunate since 37% of drivers identified this as a need.



According to employers who participated in the survey, the average monthly net salary for truck drivers is PLN 7,797, whereas bus drivers earn an average of PLN 5,806 (net amount). Sixty-four percent of surveyed carriers engage in international transport within the EU, with most offering drivers work from Monday to Friday. Almost 44% of carriers still report difficulties finding drivers for their work. Interestingly, the importance of traditional recruitment methods, such as press announcements or internet forums, is declining, while specialized job portals and recommendations from other drivers dominate. These methods received 42% and 38% of responses, respectively.

This report also describes the work and career in the TFL industry in more detail, particularly earnings in segments other than transport. It presents possible career paths, along with the necessary competencies and responsibilities required for various positions, ranging from general and operational directors to managers, specialists, and line positions, each with an indication of the salary range. Additionally, the report specifies the required knowledge of specific software necessary for performing duties in each position. Language skills are also essential, given the highly internationalized nature of the TFL industry.

The transport industry is the lifeblood of the economy, and its fortunes are often closely tied to the international situation. Economic processes within the industry can serve as early indicators of upcoming crises or periods of prosperity. Current market data indicate a slight slowdown in the indices during the last quarter of 2022, returning to levels seen at the beginning of the year. Is a crisis looming? Will the market continue to favor drivers? Only time will tell, and we look forward to checking in next year to see how inflation and economic slowdowns will affect drivers' earnings. We are pleased to present this publication and hope it provides valuable insights into the TFL industry.

As we move forward, the transport industry will need to adapt to various challenges, such as workforce shortages, technological advancements, and changing global economic conditions. Companies must be proactive in addressing these challenges by investing in employee development, promoting innovative solutions, and maintaining open communication with both their workforce and customers.

Moreover, the industry must focus on attracting young talent by offering competitive compensation packages and highlighting the potential for growth and development within the sector. Environmental sustainability will also play a critical role in shaping the future of the TFL industry, as companies will need to find ways to reduce their environmental impact and meet the increasing demand for green logistics solutions.

In conclusion, while the TFL industry faces numerous challenges, it also offers ample opportunities for growth and development. By staying abreast of market trends and adapting to changing circumstances, companies within the sector can continue to thrive and contribute to the overall health of the global economy.





Agnieszka Sz waj,
Marketing Manager
Poland & EE, Webfleet

For the third consecutive year, Webfleet has sponsored the “Drivers Earnings Report,” and each time, we are delighted to uncover new and interesting insights as a company that supports not only carriers in fleet management but also our end-users: the drivers who perform their daily duties.

This year’s edition of the report is unique because it considers, for the first time, the impact of the revolutionary changes brought about by the regulations on working time and driver settlement included in the Mobility Package, which stirred up emotions and fears across the industry. The new regulations have resulted in an increase in drivers’ salaries, which, as the report’s results demonstrate, have been recorded not only for those driving on international routes but also for those driving locally. Furthermore, due to the deepening shortage of employees, employers seem to have started prioritizing the care for those they already have on board, as evidenced by the increase in wages that accompanies seniority with a particular carrier.

We are delighted to see that an increasing number of drivers (72% according to the survey responses) are using new technologies, as these digital tools can improve their work, increase their efficiency, enhance safety, and eliminate stress. These factors have a decisive impact on the level of job satisfaction and the overall image of the driver’s profession, as stress and road hazards were ranked among the top negative aspects of working behind the wheel. To address these challenges, telematics and fleet management systems offer great support. For instance, video telematics solutions, such as smart dashcams, enable better driver training, warn of dangerous road incidents, protect drivers against false accusations, and, above all, improve safety.

The automation and digitization of transport-related processes, which are being transferred to mobile applications, are rapidly advancing. With apps like Webfleet Vehicle Check, drivers can significantly streamline vehicle inspections and submission of checklists. Through tools such as Work App, they can use navigation and manage daily tasks from any mobile device. Drivers can easily view new orders, automatically share data with dispatchers, communicate with the head office, provide accurate ETAs, and record their working hours



as well as their business and private trips—all in one app, on one terminal.

Referring to last year's joint study with PITD titled "Mobility 2032: are you ready?", it is important to acknowledge that the digitization process in the TFL industry will continue to progress. The study reveals that 58% of carriers want to automate processes, nearly 43% plan to eliminate paper tasks by digitizing their document flow, and over 50% see significant benefits in integrating with exchanges and transport platforms. These developments will necessitate specific changes in the way drivers work and require them to learn new skills to use these new tools effectively. As producers and suppliers of new solutions, and employers who should be more actively involved in the education and development of their employees, we have a lot to do in this area. However, drivers are open to such solutions and even expect employers to finance training courses (as indicated by nearly 12% of respondents in the report).

We are witnessing a transformation in the character, meaning, and perception of the professional driver profession, but we firmly believe that this process represents a positive change, and new technologies and telematics, in particular, are poised to support it.



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