

Driver shortage
report 2022

Spain



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Spain

Key indicators



Driver shortage

More than 2,000 bus and coach driver jobs were unfilled in 2021 in Spain.

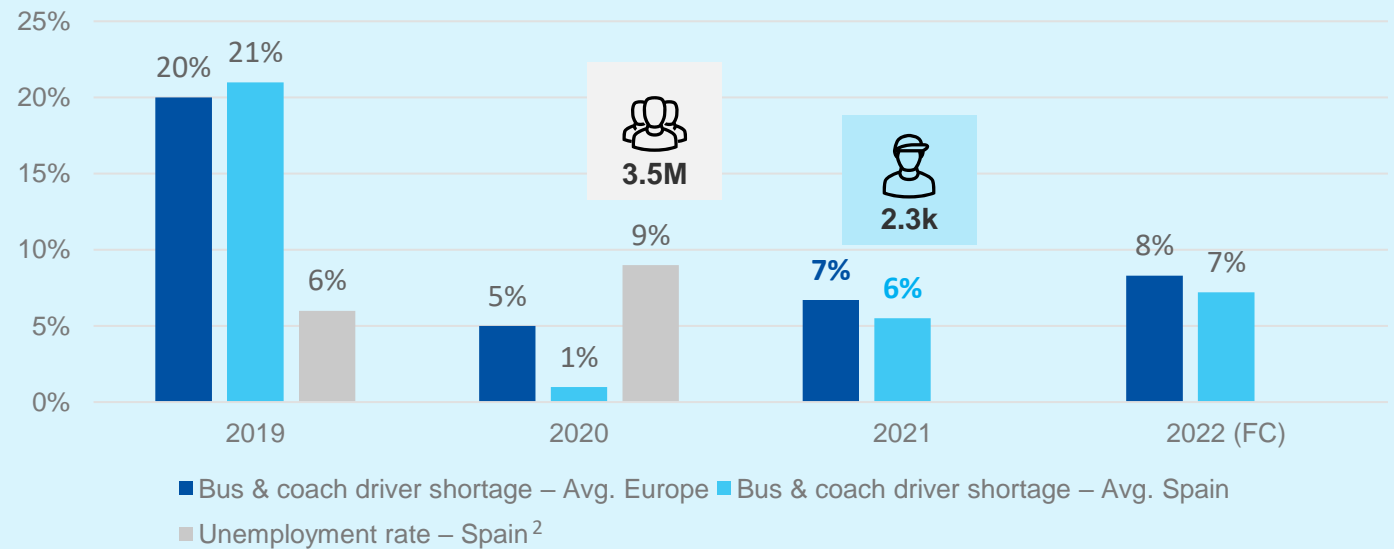
2,000 k

Increasing bus and coach driver shortage

6% bus and coach driver positions were unfilled in 2021 in Spain, representing around 2,300 jobs. This was despite an available workforce of 3.5 million unemployed workers that could largely fill the driver gap.

Operators surveyed expect the level of shortage to reach 7% of unfilled driver positions in 2022 (+32% increase versus 2021).

% of unfilled bus and coach driver positions¹



Soaring driver shortage due to partially recovered business activity

Unfilled bus and coach driver positions increased by over 400% in 2021 compared to 2020.

This is the result of increased road passenger transport demand in 2021 compared to 2020, together with a decrease in the number of bus and coach drivers:

- The volume of passengers transported by bus increased by 22% for urban, 24% for interurban, 43% for occasional, and 39% for special transport.
- Additionally, less drivers were available as a consequence of the pandemic: some of

them had moved to the trucking industry (where activity did not stop), and less new/young drivers had entered the profession.

However, the level of shortage is still far from pre-pandemic levels, as the industry has not yet recovered. The volume of passengers transported in 2021 was 34% below 2019 levels. Occasional transport was the most impacted segment (-68%), followed by long-distance transport (-54%). On the contrary, special transport (-12%) was the least impacted.

However, it does not appear that these wage increases have attracted more professionals to the industry.

Sources : IHS Markit, OECD, Transport Intelligence, CNR, IRU.

Gender representation

There are only 12 % women bus and coach drivers in Spanish bus and coach driver workforce, compared to the 21% share within transport sector employees.

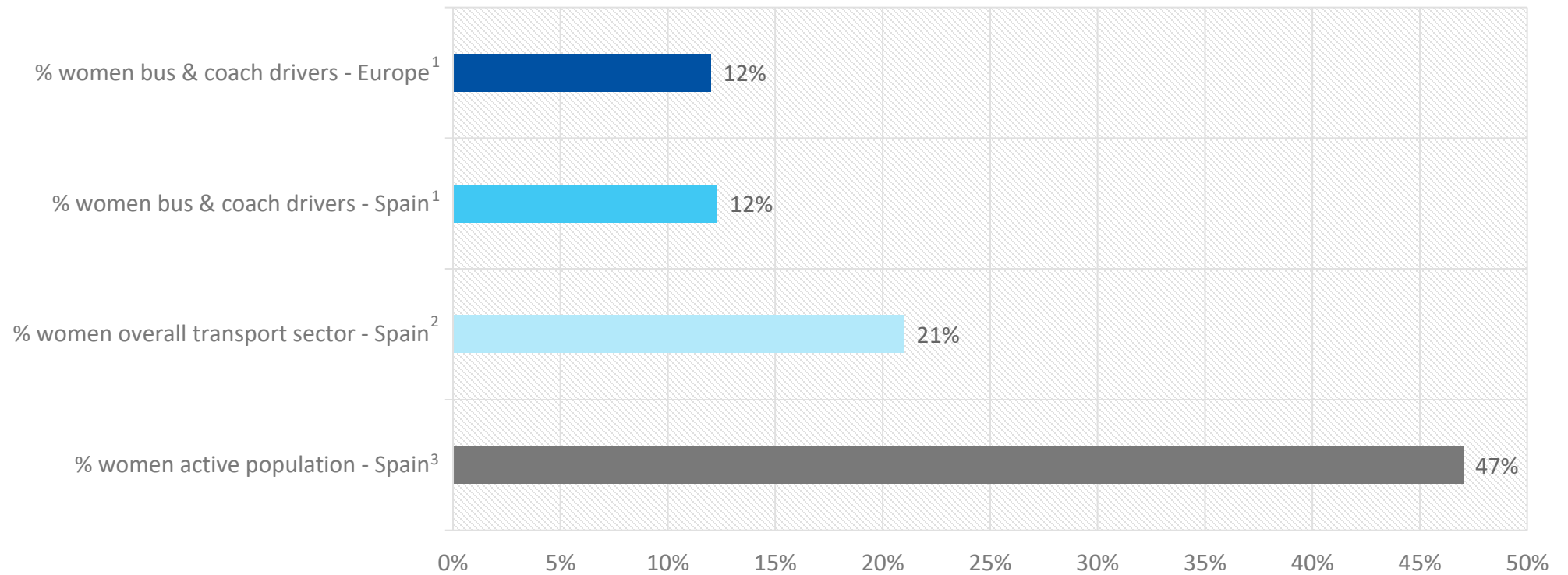
However, it is in line with the average of European countries surveyed.

It is also higher than for freight (2%), mainly because of less working hours, or more flexible ones, especially in the case of urban transport and special services (school, transport of workers).



Female bus and coach driver representation far from overall transport industry benchmark, but in line with the average of the European countries surveyed

Gender distribution 2021



1. IRU survey 2021.; 2. Eurostat 2020 (Transportation and storage); 3. Eurostat 2020.

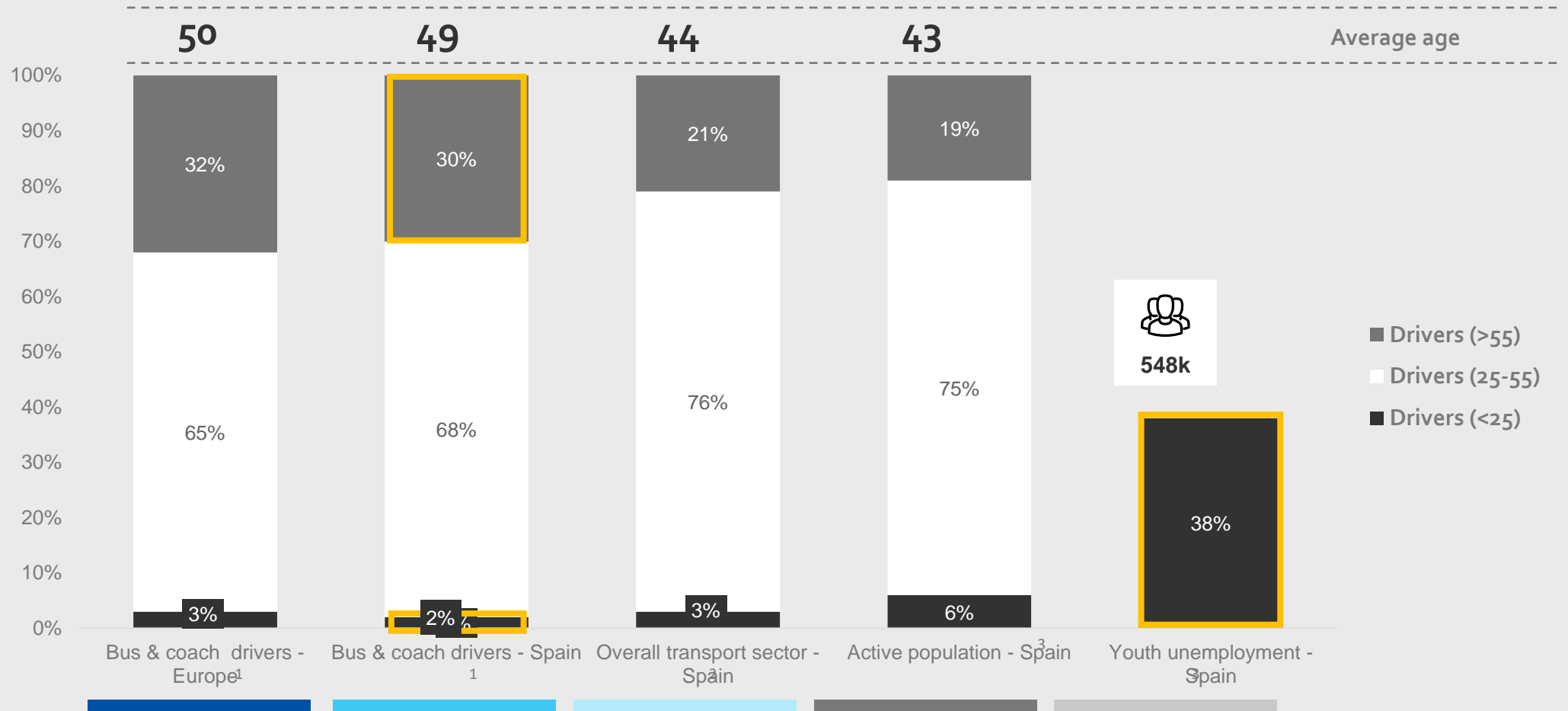
Age distribution

In Spain, the share of young bus and coach drivers below 25 years is very low (2%).

However, there is an available workforce of more than half a million unemployed young people that could be retrained and integrated to the profession.

2%

Age distribution – 2021



1. IRU survey 2021.; 2. Eurostat 2020 (Transportation and storage); 3. Eurostat 2020.

Ageing bus and coach driver workforce despite sky-high youth unemployment

The Spanish bus and coach driver population is older than the transport sector workforce as well as the total working population (average age of 49 versus 44 and 43 years old, respectively). It is slightly younger than the average of European countries studied (50 years old).

The proportion of **young bus and coach drivers below 25 years old is very low (2%)**. This may be partly explained by the ageing Spanish population (only 6% employees in the working population are below 25 years old), but there is still room for improvement.

It may also be explained by the fact that until January 2021, the minimum age to access the profession was 24 years old. From that date, the **minimum age was**

lowered to 21 years old¹ (as is the case in most European countries). In addition to not allowing the employment of the young people below 21, this minimum age makes the profession very unattractive for youth, as many young people are not ready to wait at least 3 years after the end of their studies to be able to access the bus and coach driver profession.

However, with a sky-high youth unemployment of 38% (highest rate of all EU countries), there is an opportunity to attract and retrain some of the half million unemployed young people as drivers, and largely cover the existing gap.

1. In case of a standard initial qualification training (240 hours); however, in this case drivers will be able to drive nationally from the age of 20, and from the age of 18 in case of vehicles without passengers or for regular transport lines of up to 50 kilometres within national territory. In case of an accelerated initial qualification training (140 hours), the minimum age is 23 years old, but they will be able to drive regular transport lines of up to 50 kilometres from the age of 21.

Measures to attract and retrain these people as drivers would be also beneficial for the society.

On another other hand, around one third of Spanish bus and coach drivers are **over 55 years old (30%)**. It is above the share of old employees over 55 in the transport sector and working population (21% and 19% respectively), but slightly ahead of the average of European countries surveyed (32%).

The share of old drivers (30%) is also very high when compared to the share of young drivers (2%). This means the driver gap will increase as old drivers retire and there are not enough young drivers to replace them.

Foreign drivers

Around 4%¹ of Spanish bus and coach driver workforce are from a foreign country.

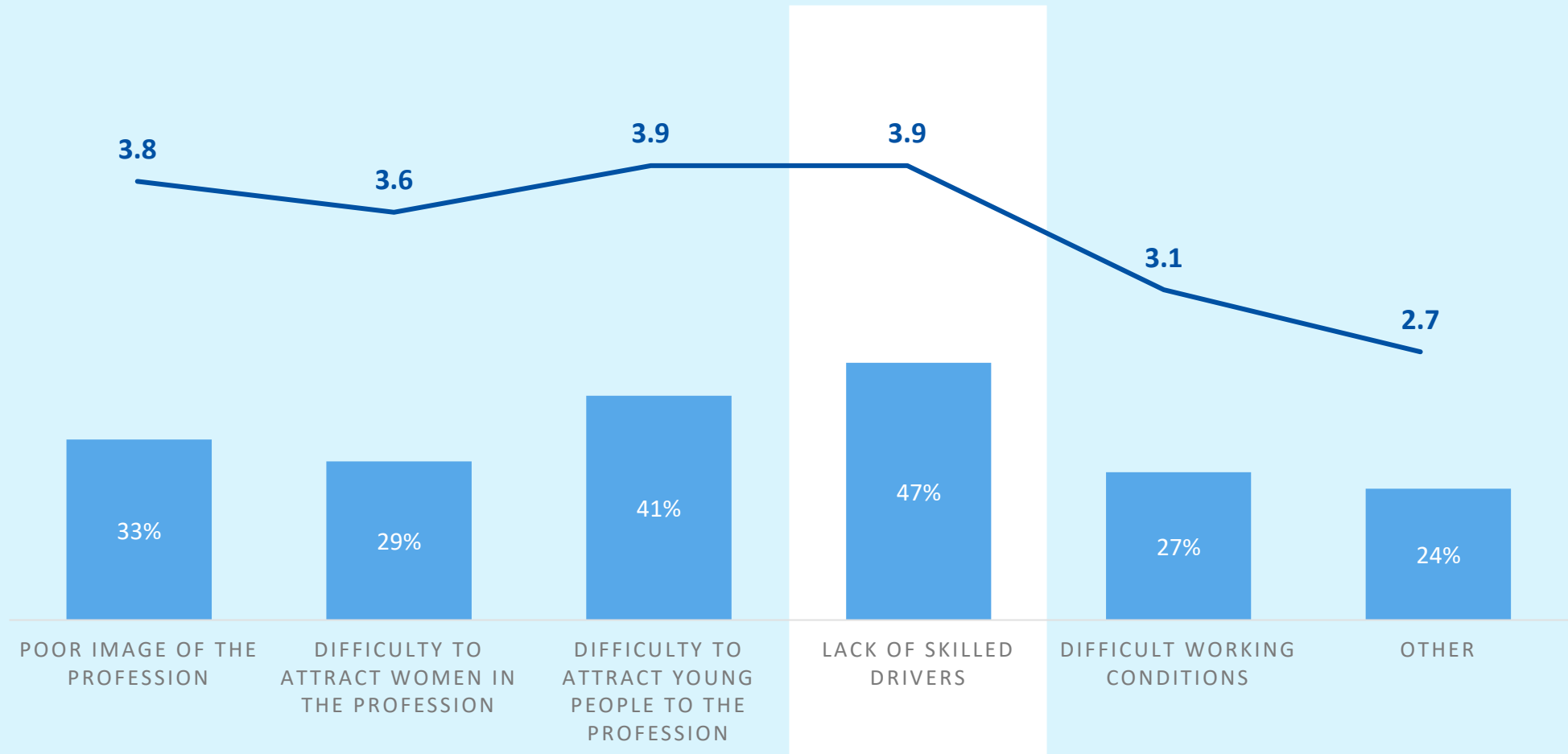
Foreign drivers from the EU are mainly Romanian, Portuguese and Italian, while third-country drivers are mainly Moroccan, Ecuadorians, Argentineans, Colombians and Ukrainians.

In Spain, the truck driving license exam and Certificate of professional Competence exam can only be taken in Spanish², thus limiting the number of third-country drivers who could come to cover the shortage of national drivers. This is why many third-country drivers are Latin Americans.

1. IRU survey 2019; 2. And in regional languages (Catalan, Galician...).

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Main reasons explaining bus and coach driver shortage (according to operators surveyed)¹

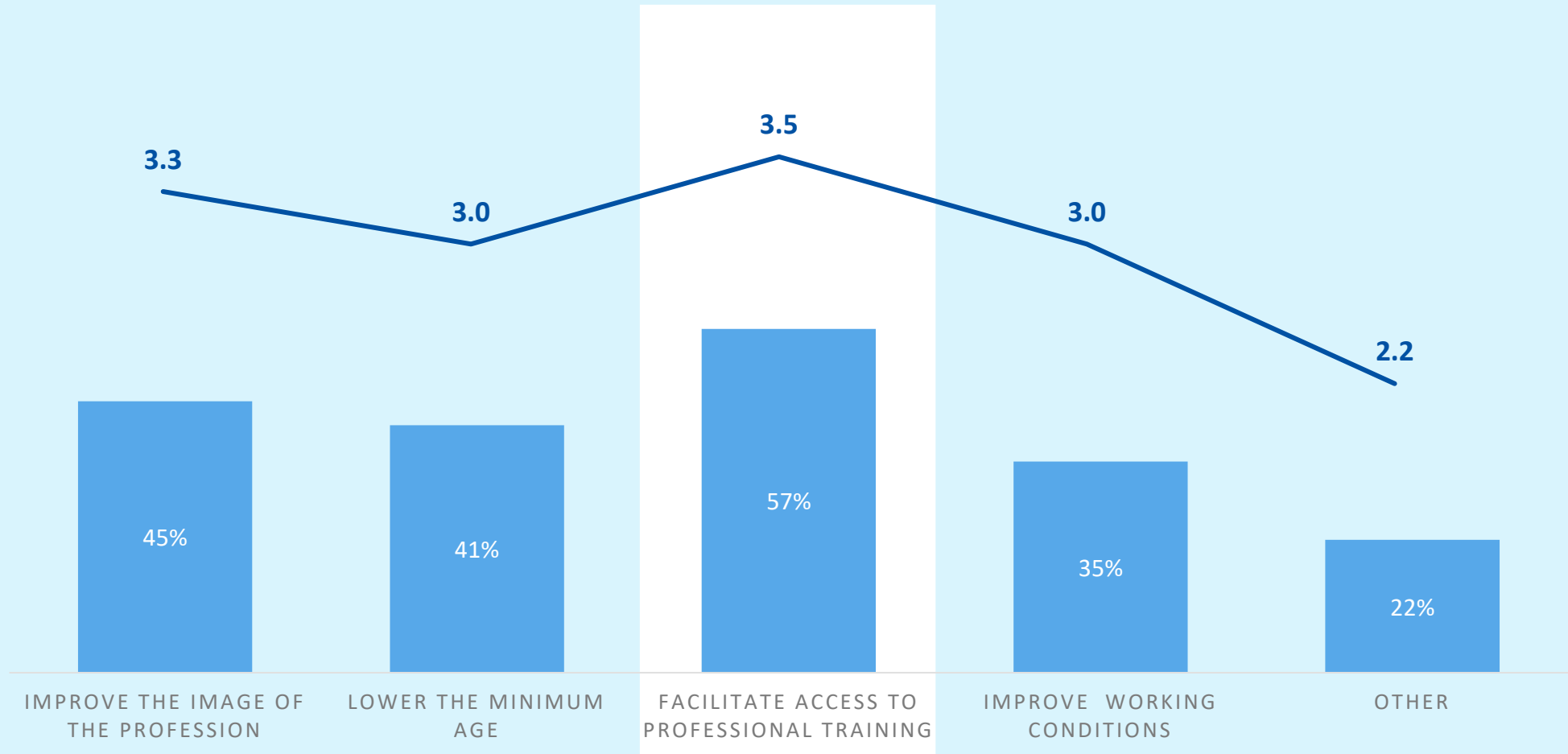


1. IRU survey 2021.

■ % respondents ranking the reason as top 1 or top 2 by importance (ranking = 6 or 5)

— Average ranking (6 = most important)

Main measures to be taken by governments to address driver shortage (according to operators)¹



1. IRU survey 2021.

■ % respondents ranking the reason as top 1 or top 2 by importance (ranking = 6 or 5)

— Average ranking (6 = most important)

CONFEBUS is the Spanish Confederation of Transport by Bus and Coach, an organisation that represents and defends the interests of the Spanish bus and coach undertakings providing a wide range of services (regular, urban, occasional, school, tourism, management of terminals, etc).

What are IRU members doing?

Q: According to Confibus, what are the main obstacles to attract drivers in Spain?

First, the cost of the driving license and Certificate of Professional Competence (CPC) is expensive. This is a major barrier for new entrants to the profession

Second, even if reducing the age from 24 to 21 is already an important improvement, there is still a gap of at least 3 years between the end of their studies and the moment young people can become a driver. Moreover, we do

not have an official vocational training program to cover that gap.

Q: What measures have been implemented to address driver shortage?

Confibus has taken a series of measures in order to tackle driver shortage and attract more people to the profession:

1. We are asking for a plan of recovery and transformation for the industry. We want to use EU funding to develop training, education and campaigns to attract younger workforce and women.

2. We do communication campaigns to raise awareness on the importance of the sector as well as the positive conditions of the profession (such as the stability of the job) in order to attract women and young people.

3. We advocate for the inclusion of the driver profession within the list of jobs with difficult employability, to negotiate further labour flows agreements with countries from Latin America and to implement a pilot program to allow the hiring of asylum seekers and refugees.

What are IRU members doing?

We also asked authorities to conclude new international agreements to recognise and exchange driving license with third countries and to amend some of the existing ones (which were concluded only for the exchange of the driving license for cars and light vehicles). This has been partially successful.

4. Concerning driver training, we have requested the Minister of Transport to:

- Come up with an official vocational training programme on professional driving for young people.
- Look for ways so that the CPC can be partially undertaken online so that Spanish undertakings carrying operations in third countries can bring their professional drivers to work in Spain.

5. We have tried to partner with different stakeholders to jointly address the issue and/or develop joined initiatives: trade unions (not successful for the time being),

associations representing young people (to highlight the existence of a lack of jobs in such a stable employment sector), and the Association of Driving Academies (to create an information system of job opportunities for all those who take the relevant licence). However, none have been successful so far.

Methodology adopted to estimate national driver shortage

- Unfilled truck driver jobs have been calculated jointly with CONFEBUS, based on the total number of truck drivers in the country.
- In order to ensure the reliability of our results, we conducted the same exercise through a survey shared with more than 50 road passenger transport companies registered in Spain.
- The population of respondent companies illustrate the different companies' profile in terms of size (vehicle fleet) and type of operations (national to international).

Spanish respondents are mainly medium and large companies operating nationally

