Road haulage services, cabotage: admission of non-resident carriers (Regul. 3118/93/EEC). Report

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PURPOSE: By virtue of Article 11 of Regulation 3118/93 establishing quotas for Cabotage (ie. national transport by non-resident hauliers), the Commission presents a report such as this one to the Council every two years on the application of this Regulation. CONTENT: After explaining the source and the extent of exhaustiveness of the given statistics, the report details the main results relating to Cabotage Statistics, 2nd half 1990 to 2nd half 1995 inclusive. In this time period, cabotage is said to have increased almost five-fold. Benelux hauliers are singled out as the most active in the cabotage market. In relation to this, it is pointed out that there is a greater incentive for hauliers from "geographically small" countries to do cabotage because their own national markets are so small and other national markets are "geographically quite close". The most "active" of the other nations in the cabotage market were France, Denmark, the United Kingdom and Sweden. Despite the relatively large number of authorizations allocated to Germany and Italy, their hauliers' involvement in cabotage remained limited. The fact that only 2% of the cabotage was carried out by hauliers from "low labour cost" countries (Greece, Portugal, Spain) undermines claims that hauliers from such countries would provide "unfair" competition for hauliers in "high labour cost" countries. Almost 70% of cabotage was carried out in Germany and 12% in France, while Italy's proportion has fallen from 12% to 5%. The largest quantity of cabotage carried out by hauliers from one specific state in another specific state was by Dutch hauliers in Germany. The report then forecasts that by 1998, cabotage will have risen by 70% on 1995. It is anticipated that Benelux hauliers will continue to dominate the market, with an estimated 60% of all cabotage in 1998. The largest quantity carried out by hauliers from one specific state in another specific state is expected to continue to be by Dutch hauliers in Germany, amounting to 33% of all cabotage by all hauliers in all states. The report finally draws the following conclusions: - although the number of cabotage authorizations has been raised considerably, the overall influence on the market is very small; - this situation is not expected to change abruptly following the abolition of cabotage quotas in mid-1998; - the most successful cabotage hauliers are not those from "low labour cost" countries, but those from Member States with very efficient enterprises.