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## **REPORT FROM THE COMMISSION**

**on the implementation of Regulation (EEC) N° 3118/93 laying down the conditions  
under which non-resident carriers may operate national road haulage services within a  
Member State (CABOTAGE)**

### **2ND REPORT**

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#### 0. Introduction

- 0.1. This Report is a sequel to COM(1998) 47 final of 4.2.98 which covered the use of cabotage authorizations up to the end of 1995. This 2<sup>nd</sup> Report extends the analysis up to the end of June 1998 when, under Article 12.2 of Council Regulation (EEC) N° 3118/93 of 25 October 1993<sup>1</sup>, quantitative restrictions on cabotage were lifted. (Note quantitative restrictions on intra-Benelux cabotage had been previously lifted in 1992).
- 0.2. The geographical scope of the cabotage regime remains that of the European Economic Area (EEA) and the abolition of quantitative restrictions applies to the EEA as a whole. Finally it is recalled that Austria, which was not included in the EEA arrangements in July 1994, only joined the cabotage regime in January 1997 as a result of Protocol N° 9 to the Accession Treaty<sup>2</sup> that brought Austria into the Community.
- 0.3. This Report has five sections. The **first section** discusses the data supplied under the Cabotage Regulations. The **second section** is devoted to an analysis of the data supplied under the Cabotage Regulations between July 1990 and June 1998. The **third section** gives preliminary comments on cabotage data from the road transport sample surveys. The **fourth section** draws some conclusions. Finally the **fifth section** outlines recommendations for future monitoring of cabotage.
- 0.4. This Report is prepared by virtue of Article 11 of Regulation 3118/93, which requires the Commission to submit a report to the Council on the application of this Regulation every two years. For the sake of completeness and comparability it starts from the introduction of cabotage (under Council Regulation (EEC) N° 4058/89)<sup>3</sup> at the beginning of July 1990 to the abolition of quantitative restrictions at the end of June 1998. As the previous report, COM(1998) 47, this Report covers the EEA area; a copy will again be sent for information to the EEA Council.

#### 1. Data supplied under the Cabotage Regulations

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<sup>1</sup> OJ L 279 of 12.11.1993, p. 1.

<sup>2</sup> OJ C 241 of 29.8.1994, p. 361.

<sup>3</sup> OJ L 390 of 30.12.1989, p. 1.

- 1.1. Regulation 4058/89 and Regulation 3118/93 (until the end of June 1998) prescribed that record books should accompany cabotage authorizations. These record books provided the data for the compilation of statistics on the use of cabotage authorizations on a 100% basis. The abolition of the authorizations resulted in the abolition of the associated record books. However the Council clearly indicated in paragraph 2 of Article 12.3 of Regulation 3118/93 that monitoring of cabotage should be continued after the abolition of authorizations at the end of June 1998; hence a new form of data collection was required after June 1998. Fortunately this need arose at the same time as the review of the “Road Statistics Directive” (Council Directive 78/546/EEC of 12 June 1978<sup>4</sup> as modified by Council Directive 89/462/EEC of 18 July 1989<sup>5</sup>) was drawing to a close. This review led to the adoption, in the form of a regulation, of Council Regulation (EC) N° 1172/98 of 25 May 1998<sup>6</sup> which extended, inter alia, the types of journey to be covered in the sample surveys so as to include cabotage. More details of the cabotage data collected under the “road transport sample surveys” are given in Section 3.
- 1.2. Under the various Community instruments, each **Reporting** State has to supply data to the Commission on “tonnes” and “tonne-kilometres” relating to cabotage movements performed **by their own hauliers** on a quarterly basis with separate data for **each** (other) **partner** EEA State where cabotage could be carried out.
- 1.3. As in the previous report, COM(1998) 47, quarterly data has been aggregated on a **half-year basis** and the analysis is restricted to “tonne-kilometres” (tkm). Further, to facilitate comparisons with tables and matrices in the previous report, the same **order** of States has been retained in this Report. This order is “Germany (D), France (F), Italy (I), Netherlands (NL), Belgium (B), Luxembourg (L), United Kingdom (UK), Ireland (IRL), Denmark (DK), Greece (GR), Spain (E), Portugal (P), Iceland (IS), Norway (N), Finland (FIN), Sweden (S), Liechtenstein (FL), Austria (A)”.
- 1.4. For convenience, the previous report distinguished 2 periods, “1<sup>st</sup> period” (July 1990 to June 1994) and “2<sup>nd</sup> period” (July 1994 to December 1995) when the cabotage regime was extended to EEA (except Austria). It is useful in this Report, to further define “**3<sup>rd</sup> period**” as “January 1996 to June 1998” and “**whole period**” as “July 1990 to June 1998” so as to succinctly describe developments over time.
- 1.5. The data supplied by the **Reporting** States for the **3<sup>rd</sup> period** is complete except as follows:
- Spain: no data supplied;
- France: 1st half 1998.

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<sup>4</sup> OJ L 168 of 26.6.1978, p. 29.

<sup>5</sup> OJ L 226 of 3.8.1989, p. 8.

<sup>6</sup> OJ L 163 of 6.6.1998, p. 1.

To reduce difficulties in the interpretation of the results, the missing data has been estimated. Estimated values for Reporting States are generally shown in the tables in italics. This rule is not followed in the large matrices given in Tables 7 and 8.

1.6. This Report also makes use of tkm data on national and international transport from the “road transport sample surveys” supplemented by other sources. This data is needed in order to calculate:

- (a) “penetration rates”, where “cabotage **in** a State” is expressed as a % of the “national transport **in** the same State” , and,
- (b) “activity rates” , where “cabotage **by** hauliers of a Reporting State” is expressed as a % of “international transport **by** hauliers of the same State” (only hauliers with an international licence are allowed to undertake cabotage).

1.7. In contrast to the previous report, however, this Report interprets national (and international) transport to cover “own account” hauliers in addition to “hire or reward” hauliers. There are two reasons for this. Firstly, Commission Regulation (EC) N° 792/94 of 8 April 1994<sup>7</sup> extended the cabotage regime to “own account” hauliers. Secondly, recent work on producing more consistent time series of data for national (and international) transport has concentrated on “own account + hire or reward” and not on the split between “own account” and “hire or reward”.

## 2. Analysis of the data supplied under the Cabotage Regulations between July 1990 and June 1998

2.1. From Table 5 it can be seen that **cabotage** reported under cabotage authorizations was 10.5 billion tkm during the **whole period** (from July 1990 to June 1998). However, **national** transport for those States where cabotage was authorised at the time amounted to 6400 billion tkm during the same period; consequently cabotage only represented, on average, a penetration rate of **0.164%** (or 1 part in 600) in national transport during the whole period (see Tables 5 and 6). **International** transport (again in tkm) over the whole period was approximately one quarter of national transport; hence cabotage corresponded to, on average, **0.66%** (or 1 part in 150) of the activity of international hauliers during the whole period.

2.2. Due mainly to the rapid increase in the number of cabotage authorizations (from **15298** for “July 1990 to June 1991” to **85098** in 1997), **cabotage increased 6-fold** from 176 million (mio) tkm in **2<sup>nd</sup> half 1990** (**352** mio tkm on an annual basis), to **2224** mio tkm in **1997** (see Table 3).

2.3. Despite a **further 30%** increase in the number of cabotage authorizations available in **1<sup>st</sup> half 1998** (as compared to either half year in 1997) a small **absolute decline** to 1010 mio tkm was reported in **1<sup>st</sup> half 1998** (**2020** mio

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<sup>7</sup> OJL 92 of 9.4.1994, p. 13.

tkm on an annual basis). This is considered to be due to fairly substantial under-reporting in this half year, probably due to the fact that hauliers knew that they would not have to justify their need for authorizations for the following quarters to their authorities (for further comments on under-reporting see § 3.7 – 3.9).

- 2.4. As national transport only grew by some 20% from 1990 to 1998, Table 6 shows that the average penetration rate of cabotage in national markets increased 5-fold from **0.05%** in 2<sup>nd</sup> half 1990 to **0.25%** in 1997. The apparent decline to 0.22% in 1st half 1998 is considered to be due to under-reporting (see also § 3.7 – 3.9). Similarly, while cabotage corresponded to about 0.2% of the activity of international hauliers in 2<sup>nd</sup> half of 1990, it rose to about 1% in 1997.
- 2.5. The average use of a (2-month) cabotage authorization is given in Table 4. It was **30800** tkm over the whole period (July 1990 to June 1998). The average use rose rapidly from **23000** tkm (2<sup>nd</sup> half 1990) to **47500** tkm (1993) but then declined steadily to **26100** tkm (1997) with an apparent sharp further fall to **18200** tkm (1<sup>st</sup> half 1998). Again the decline in average use is thought to be partially due to under-reporting (see again § 3.7 - 3.9).
- 2.6. The hauliers from the Benelux States have been the most active in the cabotage market; Table 3 shows that **58.7%** of all cabotage was done by Benelux hauliers (indeed **31.2%** was done just by **Dutch** hauliers) despite the Benelux collectively having **only 22.5%** of the cabotage authorizations (see Table 2). Consequently, Table 4 shows that, over the whole period, hauliers from each of the 3 Benelux States had an average use between **70200 and 86900** tkm per authorization compared to **16400** tkm per authorization for non-Benelux hauliers.
- 2.7. Other “active” hauliers in the cabotage market were from **Sweden** (5.0% of all cabotage tkm, with 3.7% of all cabotage authorizations, and average use of 42000 tkm), **France** (12.7%, 10.6% and 36700 tkm respectively) and **Denmark** (6.7%, 7.6% and 27300 tkm respectively).
- 2.8. **German, Italian and United Kingdom** hauliers were not very active in the cabotage markets achieving only **5.3%, 3.1% and 3.0%** respectively of the market; this was despite these States being allocated a relatively large number of authorizations (12.8%, 10.6% and 6.7% respectively). Consequently their average use per authorization was only 12600, 9100 and 14000 tkm respectively.
- 2.9. Only **2%** of the cabotage was carried out **by** hauliers from the “low labour cost” States (**Greece, Spain, Portugal**) despite the fact that hauliers from these 3 States were allocated 16.2% of the cabotage authorizations. Average use of authorizations by Greek, Spanish and Portuguese hauliers were thus only 20, 5500 (estimate) and 3700 tkm respectively. Fears that hauliers from “low labour cost” States would provide “unfair” competition for hauliers in “high labour cost” States thus continued to be unfounded.

- 2.10 Table 5 shows that **68.3%** of all cabotage was carried out in **Germany**, the **most popular** “Partner State”, the proportion having risen from **64%** (1<sup>st</sup> period) to **73%** (2<sup>nd</sup> period) but then declined to **69%** (3<sup>rd</sup> period). Table 6 shows that the penetration rate of cabotage in the German national market has risen from **0.12%** (2<sup>nd</sup> half 1990) to **0.75%** in 1997 (but further see § 3.7 – 3.9). As German hauliers only performed 5.3% of all the cabotage carried out, it is evident that Germany has a very substantial negative balance as far as cabotage is concerned.
- 2.11. While **12.6%** of cabotage was carried out in **France**, the **2<sup>nd</sup>** most popular “Partner State”, cabotage penetration was **0.21%** in the French national market in 1997. Further, as **French** hauliers performed 12.7% of all cabotage, there was an almost exactly “zero” balance of cabotage as far as France is concerned.
- 2.12. The **3<sup>rd</sup>** most popular “Partner State” was **Italy** where **6.9%** of all cabotage was performed. As Italian hauliers themselves were rather inactive (performing only 3.1% of all cabotage), Italy had a negative balance on cabotage.
- 2.13. The only other States with apparent negative balances on cabotage were **Spain**, **Greece** and **Norway**. However, in the case of **Spain**, some caution is needed since data for Spanish hauliers has had to be estimated from 1996 onwards and, even just prior to that, there were indications of under-reporting. In the case of **Greece**, the negative balance was due to the fact that Greek hauliers did not report doing any cabotage after 1991. In the case of **Norway**, although twice as much cabotage has been done in Norway than by Norwegian hauliers, the penetration rate in Norway was only 0.25% in 1<sup>st</sup> half 1998.
- 2.14. Table 7 shows the amount of cabotage carried out by hauliers from each **Reporting State** (the rows of the matrix) in each **Partner State** (the columns of the matrix) during the **3<sup>rd</sup>** period (January 1996 to June 1998). Similarly Table 8 gives the corresponding matrix for the **whole** (8 year) period (July 1990 to June 1998). Table 9 ranks the leading “caboteurs” (cabotage by hauliers from a specific **Reporting State** in a specific **Partner State**) for the 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> and **whole** periods in terms of the ranked order for the **whole** period (July 1990 to June 1998).
- 2.15. The 1st ranked “caboteurs” were **Dutch hauliers in Germany**. They performed 2814 out of 10517 mio tkm over the whole period of 8 years, i.e. **27%** of **all** cabotage (i.e. **by all hauliers in all States**). “Dutch hauliers in Germany” held the 1st rank in all 3 periods accounting for 19%, 31% and **29%** of all cabotage in the 3 periods respectively.
- 2.16. Similarly, the 2nd ranked “caboteurs” were **Belgian hauliers in Germany**, accounting for **10%** of **all** cabotage (1055 out of 10517 mio tkm). While “Belgian hauliers in Germany” held the 2<sup>nd</sup> rank in the 1<sup>st</sup> and 2<sup>nd</sup> periods (accounting for 14% and 11% respectively) they accounted for **only 7%** in the **3<sup>rd</sup>** period, being overtaken by “**Luxembourg hauliers in Germany**” (with **9%**) and “**Belgian hauliers in France**” (with **8%**).

- 2.17. Other noteworthy “caboteurs” in the 3<sup>rd</sup> period were “**Swedish hauliers in Germany**” and “**French hauliers in Germany**” (each about 6.5%).

**3. Preliminary comments on cabotage data from the road transport sample surveys**

- 3.1. The proposal to include cabotage in the Road Statistics Directive (78/546) was made by the Commission in 1987, COM(87) 548 final of 20 November 1987, which explicitly proposed to include cabotage in the types of journey (listed in Article 1 of the Directive) that should be covered by (sample) surveys under the Directive. The Council, however, in adopting Directive 89/462 (which modified 78/546), specifically excluded cabotage on the grounds that it was still, at that date, “illegal”.
- 3.2. Drafts for a second modification of the Road Statistics Directive were in preparation for a long time and it was not until 25 May 1998 that the Council formally adopted a replacement for the Road Statistics Directive in the form of a Regulation (1172/98). Even then, its final adoption was accelerated by the imminent cessation of data on cabotage from the Cabotage Regulation (3118/93).
- 3.3. As is customary, Member States were given a period to adjust their surveys so as to include, inter alia, cabotage; consequently the new Regulation (1172/98) only applies to data collected from 1.1.1999 onwards. The Council was conscious of the **gap** that would arise for cabotage data between the end of the Cabotage Regulation (i.e. 30.6.1998) and the formal start of the Road Statistics Regulation (i.e. 1.1.1999). The Council therefore asked Member States to provide the Commission, if possible, with cabotage data from their road transport sample surveys for the missing period, i.e. 2<sup>nd</sup> half 1998. **Six** States (five Member States and Norway) have, so far, responded to this request. They had already started to collect data on cabotage in their sample surveys (as stated above, the draft of the Road Statistics Regulation had been in preparation for a long time).
- 3.4. The Commission’s services were also conscious that a change in the source of data on cabotage (July 1998) might be “confounded” with the effects of the abolition of quantitative restrictions on cabotage (also July 1998). The Commission’s services therefore asked States to provide, where possible, data on cabotage from the sample surveys for the period **prior** to 2<sup>nd</sup> half 1998; this would enable comparisons to be made between the two sources of cabotage data for the **same** period. In making such comparisons, it is necessary to exclude intra-Benelux cabotage since intra-Benelux cabotage was freed from quantitative restrictions in 1992 (only an insignificant amount was recorded in the cabotage data collected under the cabotage regulation after 1992).
- 3.5. In consequence, the Commission’s services have already received fairly extensive data from some Member States and Norway on cabotage from the sample surveys prior to 1999. However, as statistical experts from the States have pointed out, the sample surveys generally only cover about 1% of all journeys carried out; and, of these journeys, only a very small proportion are

cabotage. Consequently, as this cabotage data had not, generally, been collected with a view to its publication at a fine level of detail, it had not been subjected to the data quality controls normally carried out prior to publication. To accommodate these justified warnings from the statistical experts, this Report combines the quarterly data on cabotage from the sample surveys both “over time” and “over Reporting States”; the conclusions drawn from this “aggregated data” should thus be sufficiently reliable.

- 3.6 An examination of the data received so far from the road transport sample surveys indicates that:

**There was no “explosion” of cabotage when quantitative restrictions were abolished in July 1998.** This provisional conclusion is based on data from 5 States (France, Netherlands (excluding intra-Benelux), United Kingdom, Norway and Finland). These are the only States that have so far provided data from sample surveys for both 1<sup>st</sup> half and 2<sup>nd</sup> half 1998. This data shows only a **2% increase** in cabotage tkm after quantitative restrictions were abolished in July 1998. It should be noted that these 5 States accounted for 45% of the cabotage carried out under the Cabotage Regulation in 1<sup>st</sup> half 1998.

- 3.7 A comparison of the data from the Cabotage Regulation with that received so far from the sample surveys indicates that:

(i) **There was, generally, progressive under-reporting in the Cabotage Regulation. The adjustment factor has been estimated as 1.1 for 1996, 1.4 for 1997 and 1.8 for 1<sup>st</sup> half 1998.** The adjustment factor for 1997 is based upon data for 8 States (France, Belgium and Netherlands (both excluding intra-Benelux), United Kingdom, Denmark, Norway and Sweden and Austria); these states accounted for 80% of the cabotage carried out under the Cabotage Regulation in 1997. It should therefore be a fairly reliable adjustment when it comes to combining the two series of data on cabotage that will be required in the future when only data from the sample surveys will be available. The adjustment factor for 1<sup>st</sup> half 1998 is only based, so far, on 4 States (Netherlands (excluding intra-Benelux), United Kingdom, Norway and Finland). These 4 States accounted for only 33% of the cabotage carried out under the Cabotage Regulation in 1<sup>st</sup> half 1998, so that this factor must be regarded as provisional. The adjustment factor for 1996 has been set so as to provide a smooth evolution of cabotage carried out under the Cabotage Regulation. **It is assumed that no adjustment is required prior to 1996.** Although the adjustment factors are themselves imprecise, this does not affect the broad conclusions given in § 3.8 and §3.9 below.

(ii) **There is, currently, considerable under-reporting of cabotage in the sample surveys for a few States, mainly in Scandinavia.**

- 3.8. Applying the **provisional adjustment factors** given in §3.7 (i) to the main results given in Section 2 of this Report thus yields **amended figures** as follows:



- (i) cabotage carried out **by** hauliers from **all States**:
  - in 1996: **2215** mio tkm (2014 x 1.1);
  - in 1997: **3114** mio tkm (2224 x 1.4);
  - in 1<sup>st</sup> half 1998: 1818 mio tkm (1010 x 1.8), **3636** mio tkm on an annual basis.
- (ii) cabotage accounted for about **0.35%** (0.25% x 1.4) of national markets in the EEA area as a whole in 1997, and (provisionally) about **0.40%** (0.22 x 1.8) in 1<sup>st</sup> half 1998.
- (iii) cabotage **in Germany** accounted for:
  - in 1996: 1560 mio tkm (1418 x 1.1), **0.8%** of the German national market;
  - in 1997: 2122 mio tkm (1516 x 1.4), **1.0%** of the German national market;
  - in 1<sup>st</sup> half 1998: 1240 mio tkm (688 x 1.8), (provisionally) **1.2%** of the German national market.

3.9. Applying a similar adjustment, cabotage corresponded to some **1.4%** (1.0% x 1.4) of the activity of international hauliers in 1997.

3.10. The provisional nature of the adjustments means that it would be imprudent, at this stage, to carry through the adjustments to other more detailed results of Section 2.

#### **4. Conclusions**

4.1. **Cabotage** operations grew considerably during the 8 years from July 1990 to June 1998. However, even in 1997, tkm performed in national transport (i.e. transport within a State by **resident** hauliers) was **300** times larger than cabotage. Additionally, tkm performed in international transport was **70** times larger than cabotage.

4.2. 68% of all cabotage was carried out in Germany, but even, in 1997, German national transport was still 100 times larger than cabotage carried out in Germany.

4.3. Provisional results from the sample surveys indicate that there was no “explosion” in cabotage in the 2<sup>nd</sup> half 1998 after quantitative restrictions were lifted.

4.4. Efficient hauliers can still find opportunities to carry out cabotage in other States; in the EEA there is still little evidence to suggest that hauliers with low labour costs necessarily provide “unfair competition” to hauliers with high labour costs.

## **5. Recommendations for future monitoring of cabotage**

The Commission does not recommend, at this stage, any additional data collection exercises to be undertaken for monitoring of cabotage. However, States should use sampling rates (and sampling methods) in their implementation of Statistics Regulation 1172/98 that will be sufficient to provide reliable data on cabotage on an annual basis (and preferably on a half-yearly basis). This would ensure adequate monitoring of cabotage as required under 2<sup>nd</sup> paragraph of Article 12.3 of the Cabotage Regulation 3118/93.

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**Table 3:** Cabotage **by** hauliers from each **Reporting** State, by calendar year.

**Table 4:** Average use of (2-month) cabotage authorizations for each **Reporting** State, by calendar year.

**Table 5:** Cabotage **in** each **Partner** State and **National** transport, by calendar year.

**Table 6:** Penetration rate (cabotage **in** each **Partner** State/**National** transport) and Relative penetration rate, by calendar year.

**Table 7:** Matrix showing cabotage **by** hauliers from each **Reporting** State **in** each **Partner** State for **3<sup>rd</sup>** period (January 1996 to June 1998).

**Table 8:** Matrix showing cabotage **by** hauliers from each **Reporting** State **in** each **Partner** State for **whole** period (July 1990 to June 1998).

**Table 9:** Leading “caboteurs” (cabotage **by** hauliers from a **Reporting** State **in** a **Partner** State) in 1<sup>st</sup> period (July 1990 to June 1994), 2<sup>nd</sup> period (July 1994 to December 1995), **3<sup>rd</sup>** period (January 1996 to June 1998) and **whole** period (July 1990 to June 1998).

**Table 1****Cabotage by hauliers from each Reporting State by half year in 3rd period**

Units: tkm (1000's)

Reporting State	Half year				
	1-6,1996	7-12,1996	1-6,1997	7-12,1997	1-6,1998
D	34781	37287	48954	55345	48130
F	120461	111786	125342	128869	125342
I	25002	22584	25508	20948	23582
NL	325962	394842	383497	362117	286186
B	171835	183949	205108	178603	161634
L	80442	66172	109760	89060	129075
UK	36707	26205	33108	13209	8761
IRL	8713	8783	4827	3038	5068
DK	50387	48271	57481	84219	83525
GR	0	0	0	0	0
E	11122	11122	11122	11122	11122
P	6311	3217	5037	9557	11811
IS	0	0	0	0	0
N	4482	5571	7653	4527	4768
FIN	26985	32045	31536	29587	35380
S	82082	76623	78919	73041	58333
FL	30	102	284	128	1468
A			15690	16625	15423
Total	985302	1028559	1143826	1079995	1009608

**Table 2****Number of (2-month) cabotage authorizations allocated to each Reporting State**

Reporting State	7-12,1990	1991	1992	1993	1994	1995	1996	1997	1-6,1998	7,90-6,98	%
D	1085	2278,5	2507,5	2628	4452	6047	7862	10318	6707	43885	12,8%
F	896,5	1883	2072,5	2172	3681	5000	6501	8531	5546	36283	10,6%
I	897,5	1885	2074,5	2174	3685	5005	6507	8539	5552	36319	10,6%
NL	934,5	1962,5	2159	2262	3834	5209	6773	8888	5778	37800	11,1%
B	661	1388,5	1528,5	1602	2715	3687	4794	6292	4090	26758	7,8%
L	308	647	712	746	1264	1719	2235	2934	1909	12474	3,6%
UK	562	1180,5	1299,5	1362	2309	3138	4080	5355	3482	22768	6,7%
IRL	297,5	625	688,5	722	1224	1663	2162	2837	1845	12064	3,5%
DK	641	1346,5	1482,5	1554	2634	3578	4653	6106	3969	25964	7,6%
GR	292	613,5	676,5	710	1200	1631	2121	2785	1811	11840	3,5%
E	685,5	1440	1585,5	1662	2814	3823	4971	6525	4243	27749	8,1%
P	388,5	816	898,5	942	1597	2169	2820	3701	2406	15738	4,6%
IS*					5	13	17	23	15	73	0,0%
N*					198	514	669	870	567	2818	0,8%
FIN*					296	1794	2333	3063	1992	9478	2,8%
S*					590	2354	3061	4018	2613	12636	3,7%
FL**						22	43	57	37	159	0,0%
A								4256	2767	7023	2,1%
Total	7649	16066	17685	18536	32498	47366	61602	85098	55329	341829	100,0%

Notes: \* for 1994: 7-12,94

\*\* for 1995: 5-12,95

Column "%": "Reporting State" as a % of "Total"

**Table 3**

**Cabotage by hauliers from each Reporting State**

Units: tkm (1000's)

Reporting State	7-12,1990	1991	1992	1993	1994	1995	1996	1997	1-6,1998	7,90-6,98	%
D	20361	73960	70322	43667	55983	63633	72068	104299	48130	552423	5,3%
F	26012	109835	98457	125161	172218	187596	232247	254211	125342	1331079	12,7%
I	9037	33183	40516	45280	37786	45754	47586	46456	23582	329180	3,1%
NL	37804	128279	201685	226233	350103	588582	720804	745614	286186	3285290	31,2%
B	41581	139233	142233	233747	236641	319838	355784	383711	161634	2014402	19,2%
L	14843	48047	65557	80131	78038	114351	146614	198820	129075	875476	8,3%
UK	3444	32819	34176	40617	41097	47531	62912	46317	8761	317674	3,0%
IRL	5760	12757	7501	5409	11130	13882	17496	7865	5068	86868	0,8%
DK	14876	58409	69160	58768	78956	105808	98658	141700	83525	709860	6,7%
GR	0	196	0	0	0	0	0	0	0	196	0,0%
E	2013	5497	12822	19169	38211	18152	22244	22244	11122	151474	1,4%
P	57	3319	2660	2619	5799	8366	9528	14594	11811	58753	0,6%
IS*					0	0	0	0	0	0	0,0%
N*					1419	4484	10053	12180	4768	32904	0,3%
FIN*					5099	30000	59030	61123	35380	190632	1,8%
S*					33099	128715	158705	151960	58333	530812	5,0%
FL**						21	132	412	1468	2033	0,0%
A								32315	15423	47738	0,5%
Total	175788	645534	745089	880801	1145579	1676713	2013861	2223821	1009608	10516794	100,0%

Notes: \* for 1994: 7-12,94

\*\* for 1995: 5-12,95

Column "%": "Reporting State as a % of "Total"

**Table 4**

**Average use of (2-month) cabotage authorizations for each Reporting State**

Units: tkm (1000's)

Reporting State	7-12,1990	1991	1992	1993	1994	1995	1996	1997	1-6,1998	7,90-6,98	Ratio
D	18,8	32,5	28,0	16,6	12,6	10,5	9,2	10,1	7,2	12,6	0,41
F	29,0	58,3	47,5	57,6	46,8	37,5	35,7	29,8	22,6	36,7	1,19
I	10,1	17,6	19,5	20,8	10,3	9,1	7,3	5,4	4,2	9,1	0,29
NL	40,5	65,4	93,4	100,0	91,3	113,0	106,4	83,9	49,5	86,9	2,82
B	62,9	100,3	93,1	145,9	87,2	86,7	74,2	61,0	39,5	75,3	2,45
L	48,2	74,3	92,1	107,4	61,7	66,5	65,6	67,8	67,6	70,2	2,28
UK	6,1	27,8	26,3	29,8	17,8	15,1	15,4	8,6	2,5	14,0	0,45
IRL	19,4	20,4	10,9	7,5	9,1	8,3	8,1	2,8	2,7	7,2	0,23
DK	23,2	43,4	46,7	37,8	30,0	29,6	21,2	23,2	21,0	27,3	0,89
GR	0,0	0,3	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,02	0,001
E	2,9	3,8	8,1	11,5	13,6	4,7	4,5	3,4	2,6	5,5	0,18
P	0,1	4,1	3,0	2,8	3,6	3,9	3,4	3,9	4,9	3,7	0,12
IS*					0	0	0	0	0	0	0
N*					7,2	8,7	15,0	14,0	8,4	11,7	0,38
FIN*					17,2	16,7	25,3	20,0	17,8	20,1	0,65
S*					56,1	54,7	51,8	37,8	22,3	42,0	1,37
FL**						1,0	3,1	7,2	39,7	12,8	0,42
A								7,6	5,6	6,8	0,22
Total	23,0	40,2	42,1	47,5	35,3	35,4	32,7	26,1	18,2	30,8	

Notes: \* for 1994: 7-12,94

\* for 1995: 5-12,95

Column "Ratio": Ratio of "Reporting State" to "Total"

**Table 5****Cabotage in each Partner State**

Units: tkm (1000's)

Partner State	7-12,90	1991	1992	1993	1994	1995	1996	1997	1-6,98	7,90-6,98	%
D	98678	402470	470038	578950	785512	1229711	1417816	1516105	687969	7187249	68,3%
F	16034	54737	61439	107128	151304	200319	306064	297410	135865	1330300	12,6%
I	28051	98633	103194	89483	84907	71033	80967	121277	53153	730698	6,9%
NL	5998	13398	12286	5609	5644	8692	11504	11489	3677	78297	0,7%
B	6879	16741	23172	11232	21806	30967	28849	31677	12310	183633	1,7%
L	145	115	306	464	262	665	559	1239	1031	4786	0,05%
UK	11956	35648	34620	27890	36935	41548	42805	50677	21974	304053	2,9%
IRL	606	4965	5489	3119	3653	5476	6807	7614	1653	39382	0,4%
DK	1587	2989	2310	4357	1009	1909	4683	2395	1070	22309	0,2%
GR	0	83	368	3132	4199	7717	10168	22530	5766	53963	0,5%
E	5502	14835	21871	34900	35332	47332	56977	76839	35738	329326	3,1%
P	352	920	9996	14537	8115	8874	9526	8474	4064	64858	0,6%
IS*					0	0	0	0	0	0	0,0%
N*					1786	7740	13761	22504	14841	60632	0,6%
FIN*					138	1506	609	2187	494	4934	0,05%
S*					4977	13224	22766	40602	25699	107268	1,0%
FL**						0	0	5	2	7	0,00%
A								10797	4302	15099	0,1%
Total	175788	645534	745089	880801	1145579	1676713	2013861	2223821	1009608	10516794	100,0%

Notes: \* for 1994: 7-12,94

\*\* for 1995: 5-12,95

Column "%": "Partner State" as a % of "Total"

**National transport**

Units: tkm (1000 million's)

State	1990	1991	1992	1993	1994	1995	1996	1997	1-6,1998	7,90-6,98	%
D	167,3	184,8	188,0	184,5	197,4	201,3	199,2	203,1	101,4	1543,4	24,1%
F	117,6	120,2	122,2	117,9	124,1	135,3	136,5	139,0	72,5	1026,5	16,0%
I	141,8	142,4	144,5	142,0	146,9	162,4	163,6	171,3	87,3	1231,3	19,2%
NL	22,9	23,3	26,6	26,0	25,7	27,0	27,6	27,6	14,1	209,4	3,3%
B	12,4	13,3	13,8	14,6	17,5	19,0	17,2	18,0	9,2	128,8	2,0%
L	0,4	0,4	0,5	0,5	0,5	0,5	0,4	0,4	0,2	3,6	0,1%
UK	130,6	124,6	121,3	128,6	137,8	143,7	146,2	149,2	77,9	1094,6	17,1%
IRL	3,9	4,2	4,7	4,2	4,4	4,5	4,7	4,7	2,4	35,8	0,6%
DK	9,4	9,0	9,4	8,8	9,5	9,3	9,4	9,7	5,0	74,8	1,2%
GR	9,7	10,7	10,2	11,4	10,8	12,4	12,5	13,0	6,6	92,5	1,4%
E	69,2	72,0	73,6	75,5	77,2	78,7	76,3	78,8	40,1	606,8	9,5%
P	10,9	11,7	10,6	10,0	11,2	11,1	11,3	11,5	5,9	88,8	1,4%
IS											
N					8,4	9,4	10,4	11,6	5,9	41,5	0,6%
FIN					19,3	21,3	22,2	23,8	12,1	89,1	1,4%
S					25,2	27,8	29,8	31,4	14,2	115,8	1,8%
FL											
A								11,3	5,8	17,1	0,3%
Total	696,1	716,6	725,4	724,0	815,9	863,7	867,3	904,4	460,6	6399,5	100,0%



**Table 6**

Penetration rate =

**Cabotage in Partner State**  
**National Transport**

Units: Parts per 1000

Partner State	7-12,1990	1991	1992	1993	1994	1995	1996	1997	1-6,1998	7,90-6,98
D	1,18	2,18	2,50	3,14	3,98	6,11	7,12	7,46	6,78	4,66
F	0,27	0,46	0,50	0,91	1,22	1,48	2,24	2,14	1,87	1,30
I	0,40	0,69	0,71	0,63	0,58	0,44	0,49	0,71	0,61	0,59
NL	0,52	0,58	0,46	0,22	0,22	0,32	0,42	0,42	0,26	0,37
B	1,11	1,26	1,68	0,77	1,25	1,63	1,68	1,76	1,34	1,43
L	0,73	0,29	0,61	0,93	0,52	1,33	1,40	3,10	5,16	1,33
UK	0,18	0,29	0,29	0,22	0,27	0,29	0,29	0,34	0,28	0,28
IRL	0,31	1,18	1,17	0,74	0,83	1,22	1,45	1,62	0,69	1,10
DK	0,34	0,33	0,25	0,50	0,11	0,21	0,50	0,25	0,21	0,30
GR	0,00	0,01	0,04	0,27	0,39	0,62	0,81	1,73	0,87	0,58
E	0,16	0,21	0,30	0,46	0,46	0,60	0,75	0,98	0,89	0,54
P	0,06	0,08	0,94	1,45	0,72	0,80	0,84	0,74	0,69	0,73
IS*										
N*					0,43	0,82	1,32	1,94	2,52	1,46
FIN*					0,01	0,07	0,03	0,09	0,04	0,06
S*					0,40	0,48	0,76	1,29	1,81	0,93
FL**										
A								0,96	0,74	0,88
Total	0,51	0,90	1,03	1,22	1,40	1,94	2,32	2,46	2,19	1,64

Notes:

\* for 1994: 7-12,94

\*\* for 1995: 5-12,95

Relative penetration rate =

**Cabotage in Partner State** /  
**National transport**

**Total Cabotage**  
**Total National transport**

Partner State	7-12,1990	1991	1992	1993	1994	1995	1996	1997	1-6,1998	7,90-6,98
D	2,34	2,42	2,43	2,58	2,83	3,15	3,07	3,04	3,10	2,83
F	0,54	0,51	0,49	0,75	0,87	0,76	0,97	0,87	0,85	0,79
I	0,78	0,77	0,70	0,52	0,41	0,23	0,21	0,29	0,28	0,36
NL	1,04	0,64	0,45	0,18	0,16	0,17	0,18	0,17	0,12	0,23
B	2,20	1,40	1,63	0,63	0,89	0,84	0,72	0,72	0,61	0,87
L	1,44	0,32	0,60	0,76	0,37	0,69	0,60	1,26	2,35	0,81
UK	0,36	0,32	0,28	0,18	0,19	0,15	0,13	0,14	0,13	0,17
IRL	0,62	1,31	1,14	0,61	0,59	0,63	0,62	0,66	0,31	0,67
DK	0,67	0,37	0,24	0,41	0,08	0,11	0,21	0,10	0,10	0,18
GR	0,00	0,01	0,04	0,23	0,28	0,32	0,35	0,70	0,40	0,36
E	0,31	0,23	0,29	0,38	0,33	0,31	0,32	0,40	0,41	0,33
P	0,13	0,09	0,92	1,19	0,52	0,41	0,36	0,30	0,31	0,44
IS										
N					0,30	0,42	0,57	0,79	1,15	0,89
FIN					0,01	0,04	0,01	0,04	0,02	0,03
S					0,28	0,25	0,33	0,53	0,83	0,56
FL										
A								0,39	0,34	0,54
Total	1	1	1	1	1	1	1	1	1	1

**Table 7**

**Matrix showing cabotage by hauliers from each Reporting State in each Partner State for the 3rd period (1/1996-6/1998)**

Units: tkm (1000's)

Rep. State	Year	Partner State																		
		D	F	I	NL	B	L	UK	IRL	DK	GR	E	P	IS	N	FIN	S	FL	A	TOTAL
D	96-98		55388	67930	15721	10802	852	4578	0	604	30709	20533	774	0	339	5	3718	5	12539	224497
F	96-98	336463		136104	1122	55293	1955	7674	0	5	1615	69932	1605	0	0	0	32	0	0	611800
I	96-98	98159	13135		240	144	0	1723	0	110	55	3842	76	0	0	0	140	0	0	117624
NL	96-98	1542995	121753	8665		1734	3	22743	335	4413	21	32500	500	0	1672	101	14135	0	1034	1752604
B	96-98	388938	433386	19336	194		2	50228	30	359	245	6917	20	0	0	71	983	0	420	901129
L	96-98	462609	4672	5989	0	0		0	0	181	0	820	238	0	0	0	0	0	0	474509
UK	96-98	6729	70519	4828	7710	4152	0		15709	0	5819	1515	303	0	0	0	706	0	0	117990
IRL	96-98	6526	124	0	0	6	0	23479		0	0	0	0	0	0	0	294	0	0	30429
DK	96-98	258249	1217	1214	1365	364	0	4119	0		0	267	1755	0	19790	924	34619	0	0	323883
GR	96-98	0	0	0	0	0	0	0	0	0		0	0	0	0	0	0	0	0	0
E	96-98	2710	35580	600	0	10	0	0	0	0	0		16700	0	0	10	0	0	0	55610
P	96-98	93	3098	208	2	79	0	7	0	24	0	32422		0	0	0	0	0	0	35933
IS	96-98	0	0	0	0	0	0	0	0	0	0	0	0		0	0	0	0	0	0
N	96-98	13248	2	15	18	12	14	0	0	56	0	3	57	0		1	13574	0	1	27001
FIN	96-98	126303	78	218	40	3	0	0	0	1866	0	507	0	0	6747		19770	0	1	155533
S	96-98	341936	124	353	105	86	0	877	0	530	0	242	9	0	22558	2178		0	0	368998
FL	96-98	886	0	0	0	22	0	0	0	0	0	0	0	0	0	0	0		1104	2012
A	97-98	36046	263	9937	153	129	3	28	0	0	0	54	27	0	0	0	1096	2		47738
Total	96-98	3621890	739339	255397	26670	72836	2829	115456	16074	8148	38464	169554	22064	0	51106	3290	89067	7	15099	5247290

Percentage 69,0 14,1 4,9 0,5 1,4 0,1 2,2 0,3 0,2 0,7 3,2 0,4 0 1,0 0,1 1,7 0,0 0,3 100,0

Table 8

**Matrix showing cabotage by hauliers from each Reporting State in each Partner State for the whole period (7/1990-6/1998)**

Units tkm (1000's)

Rep.	Year	Partner State																		
State		D	F	I	NL	B	L	UK	IRL	DK	GR	E	P	IS	N	FIN	S	FL	A	TOTAL
D	90-98		99652	299075	31275	20270	1070	12290	2	4730	36588	28490	1706	0	339	5	4387	5	12539	552423
F	90-98	804565		214084	2391	113658	3412	35187	0	13	2756	151277	3535	0	76	0	125	0	0	1331079
I	90-98	294140	23899		816	382	0	3346	0	110	55	6158	76	0	0	0	198	0	0	329180
NL	90-98	2814183	174571	71237		31927	91	105556	534	12463	585	54235	2114	0	1752	158	14850	0	1034	3285290
B	90-98	1054820	777339	73517	22425		152	69384	30	731	1248	13131	151	0	0	71	983	0	420	2014402
L	90-98	847584	10557	11042	206	3813		0	0	251	0	1667	356	0	0	0	0	0	0	875476
UK	90-98	35706	138744	37105	17356	12517	0		38800	226	12680	23059	733	0	6	0	742	0	0	317674
IRL	90-98	15117	1600	4	166	48	0	69427		2	0	136	0	0	0	0	368	0	0	86868
DK	90-98	605516	6469	12491	3226	421	0	7215	16		0	441	4513	0	23238	924	45390	0	0	709860
GR	90-98	196	0	0	0	0	0	0	0	0		0	0	0	0	0	0	0	0	196
E	90-98	9129	89373	1222	17	18	0	123	0	0	0		51578	0	0	14	0	0	0	151474
P	90-98	762	7543	312	2	115	44	13	0	78	0	49884		0	0	0	0	0	0	58753
IS	94-98	0	0	0	0	0	0	0	0	0	0	0	0		0	0	0	0	0	0
N	94-98	17822	37	42	31	41	14	0	0	122	8	16	60	0		1	14709	0	1	32904
FIN	94-98	154623	78	274	83	6	0	55	0	2489	43	509	0	0	8051		24420	0	1	190632
S	94-98	496133	175	356	150	266	0	1429	0	1094	0	269	9	0	27170	3761		0	0	530812
FL	95-98	907	0	0	0	22	0	0	0	0	0	0	0	0	0	0	0		1104	2033
A	97-98	36046	263	9937	153	129	3	28	0	0	0	54	27	0	0	0	1096	2		47738
Total	90-98	7187249	1330300	730698	78297	183633	4786	304053	39382	22309	53963	329326	64858	0	60632	4934	107268	7	15099	10516794

Percentage 68,3 12,6 6,9 0,7 1,7 0,0 2,9 0,4 0,2 0,5 3,1 0,6 0 0,6 0,0 1,0 0,0 0,1 100,0

**Table 9**

**Leading "caboteurs"**

(cabotage by hauliers from a **Reporting State** in a **Partner State**)

Units: tkm (1000's)

"Relation"	7/1990-6/1994			7/1994-12/1995			1/1996-6/1998			7/1990-6/1998		
	N°	tkm	%	N°	Tkm	%	N°	tkm	%	N°	tkm	%
NL in D	1	553606	18,8	1	717582	30,9	1	1542995	29,4	1	2814183	26,8
B in D	2	400019	13,6	2	265863	11,5	4	388938	7,4	2	1054820	10,0
L in D	4	240584	8,2	6	144391	6,2	2	462609	8,8	3	847584	8,1
F in D	3	290822	9,9	3	177280	7,6	6	336463	6,4	4	804565	7,7
B in F	6	193433	6,6	5	150520	6,5	3	433386	8,3	5	777339	7,4
DK in D	5	219131	7,4	7	128136	5,5	7	258249	4,9	6	605516	5,8
S in D				4	154197	6,7	5	341936	6,5	7	496133	4,7
D in I	7	183789	6,2	9	47356	2,0	14	67930	1,3	8	299075	2,8
I in D	8	140892	4,8	8	55089	2,4	11	98159	1,9	9	294140	2,8
F in I	9	52461	1,8	16	25519	1,1	8	136104	2,6	10	214084	2,0
NL in F		17527	0,6	10	35291	1,5	10	121753	2,3	11	174571	1,7
FIN in D				15	28320	1,2	9	126303	2,4	12	154623	1,5
F in E	12	48705	1,7	12	32640	1,4	13	69932	1,3	13	151277	1,4
UK in F	14	38935	1,3	14	29290	1,3	12	70519	1,3	14	138744	1,3
F in B		23194	0,8	11	35171	1,5	16	55293	1,1	15	113658	1,1
NL in UK	11	51624	1,7	13	31189	1,3		22743	0,4	16	105556	1,0
NL in I	10	52408	1,8		10164	0,4		8665	0,2		71237	0,7
B in I	13	42568	1,4		11613	0,5		19336	0,4		73517	0,7
E in F	15	32442	1,1		21351	0,9		35580	0,7		89373	0,8
IRL in UK	16	29899	1,0		16049	0,7		23479	0,4		69427	0,7
D in F		22356	0,8		21908	0,9	15	55388	1,1		99652	0,9
"Top 16"		2571318	87,1		2057834	88,8		4565957	87,0		9045868	86,0
"All"		2950878			2318626			5247290			10516794	