

Road freight cabotage

1991-1999

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Statistics in focus

TRANSPORT

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Contents

Overall trends and breakdown
by reporting country 2

Where does cabotage take
place ? 4

Leading “caboteurs” 5

Cabotage reporting under
the new Road Statistics
Regulation 6

Cabotage operations by road freight hauliers have increased considerably: from 646 thousand tkm in 1991 to 2,2 million tkm in 1997. Still, national transport (expressed in tkm) by resident hauliers was 400 times larger than cabotage in 1997 – overall influence remains thus small. Cabotage here means road transport inside a country by a haulier based in another country.

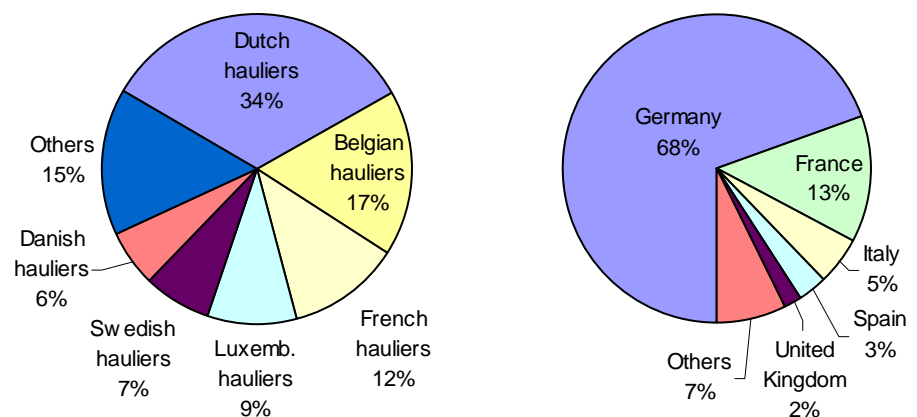
68% of the entire cabotage in 1997 was performed in Germany, 13% in France.

Hauliers from the Benelux countries have been particularly active in the cabotage market. In 1997, Dutch hauliers alone are responsible for 34% of the entire cabotage transport. Fears for ‘unfair competition’ from ‘low labour cost’ countries remain unfounded: only 2% of the cabotage was carried out by Greece, Spain and Portugal.

Benelux hauliers have used cabotage authorisations (required before July 1998), much more intensively than hauliers from other countries: between 70200 and 86900 tkm per authorisation compared to 16400 tkm for non-Benelux hauliers.

Provisional results indicate that there was no ‘explosion’ of cabotage when quantitative restrictions were abolished in July 1998.

Graph 1:
The most active ‘caboteurs’ in 1997.....and the most ‘cabotaged’ countries

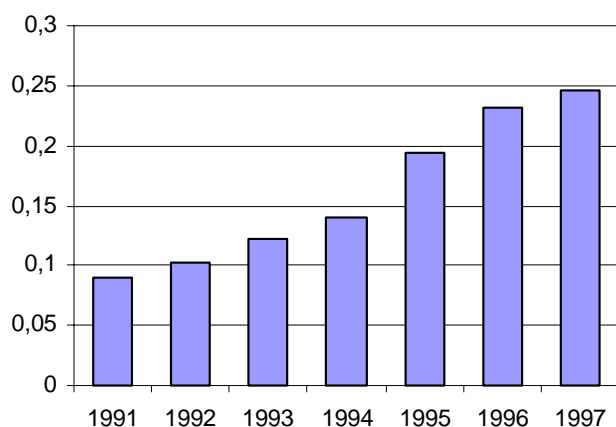


This publication presents the most recent data on cabotage operations by road freight hauliers. It covers not only the period up to mid-1998, when such cabotage was subject to Community authorizations, but it also provides the first available data for the period after 1 July 1998, when all restrictions on cabotage were removed.

Overall trends and breakdown by reporting country

Graph 2 shows the overall progression of cabotage at EEA level (see also Table 4 for details at national level).

Graph 2: Evolution of cabotage 1991-1997: overall penetration rate in EEA national transport (in %)



Source: DG TREN

The upward trend should however not lead to misunderstandings: when compared to the national transport markets (transport within a state by resident hauliers), overall influence of cabotage remains small : from the entire national transport market of EEA countries in 1997 (904400 million tkm), only 0.24% (2224 million tkm) represented cabotage transport. This corresponds to 1 part in 400.

Table 1 details the progression of cabotage: figures express the cabotage transport performed by hauliers from each reporting country: data for Germany for instance indicate the number of tkm hauled by German hauliers within another country (and not the volume of cabotage transport in Germany, which is presented in Table 3).

Since the cabotage regime was extended to the EFTA States (except Switzerland) on 1 July 1994 (Liechtenstein joined upon accession to the EEA – 1 May 1995), data for those countries have also been included. Austria joined the cabotage regime only at the beginning of 1997, explaining the lack of data for the previous years.

Table 1: Cabotage by hauliers from each reporting country – in 1000 tkm

Reporting State	1991	1992	1993	1994	1995	1996	1997	Jan.- June 1998	1997 - share (%)
Belgium	139 233	142 233	233 747	236 641	319 838	355 784	383 711	161 634	17,3
Denmark	58 409	69 160	58 768	78 956	105 808	98 658	141 700	83 525	6,4
Germany	73 960	70 322	43 667	55 983	63 633	72 068	104 299	48 130	4,7
Greece	196	0	0	0	0	0	0	0	0,0
Spain	5 497	12 822	19 169	38 211	18 152	22 244	22 244	11 122	1,0
France	109 835	98 457	125 161	172 218	187 596	232 247	254 211	125 342	11,4
Ireland	12 757	7 501	5 409	11 130	13 882	17 496	7 865	5 068	0,4
Italy	33 183	40 516	45 280	37 786	45 754	47 586	46 456	23 582	2,1
Luxembourg	48 047	65 557	80 131	78 038	114 351	146 614	198 820	129 075	8,9
Netherlands	128 279	201 685	226 233	350 103	588 582	720 804	745 614	286 186	33,5
Austria	.	.	.	.	.	.	32 315	15 423	1,5
Portugal	3 319	2 660	2 619	5 799	8 366	9 528	14 594	11 811	0,7
Finland	.	.	.	5 099	30 000	59 030	61 123	35 380	2,7
Sweden	.	.	.	33 099	128 715	158 705	151 960	58 333	6,8
United Kingdom	32 819	34 176	40 617	41 097	47 531	62 912	46 317	8 761	2,1
Liechtenstein	.	.	.	.	21	132	412	1 468	0,0
Norway	.	.	.	1 419	4 484	10 053	12 180	4 768	0,5
EEA TOTAL	645 534	745 089	880 801	1 145 579	1 676 713	2 013 861	2 223 821	1 009 608	100

Source: DG TREN

Estimates in italic.

It appears that right from the beginning, Benelux hauliers have been taking most advantage of the cabotage regime: over the entire observation period, their position remained extremely strong. Especially Dutch hauliers are dynamic: in 1997, they performed 34% of the entire cabotage transport in Europe. Belgium, the 'top' cabotage haulier in 1991, is second

with 17%. Luxembourg is on fourth position with nearly 9%. Together, Benelux hauliers were responsible for nearly 60% of the entire cabotage transport. Hauliers from geographically small countries have more incentive to do cabotage because their national markets are often small and other national markets are geographically quite close.

However, France (11.4%) and Sweden (6.8%) have also 'active' hauliers.

The dramatic increase in cabotage operations by vehicles registered in Luxembourg is noteworthy: in 1997, the figure of nearly 200 million tkm for Luxembourg was equal to the combined total cabotage of Germany, Italy and the United Kingdom.

Fears have been expressed in the past that cabotage by so-called "low labour cost" countries might lead to unfair competition. These fears appear to be unfounded: in 1997, the share of Greek, Spanish and Portuguese hauliers together reached only an (estimated) 1.7%. In practice, many factors affect the willingness of hauliers in different countries to undertake cabotage operations. It is not expected that the deregulation of cabotage from mid-1998 will change this situation.

Data for the first six months of 1998; the last period for which authorisations were required, suggest no change in the general picture. Total cabotage by hauliers from all States summed up to 1010 million tonne-kilometres. This would mean that a small absolute decline occurred (-12%, compared to the first half year of 1997), despite a 30% increase of authorisations. Due to the fact that no justifications for authorisations would be required for the following quarters, an under-reporting seems very likely.

In general, provisional conclusions based on sample-survey data from five States show only a 2% increase in cabotage tkm after quantitative restrictions were lifted (see last chapter). It is recalled that before 1 July 1998, cabotage transport was subject to prior authorisation. Table 2 gives an insight how cabotage authorisations have been used in the last full year before quotas were abolished (1997).

The efficiency of Benelux hauliers should again be emphasized here: Dutch, Luxembourgish and Belgian hauliers made best use of each authorisation with respectively 83900, 67800 and 61000 tkm per authorisation. Sweden (37800 tkm) and France 29800 tkm), other major 'caboteurs' follow behind.

Table 2: Number of authorisations allocated in 1997 and their use

	Authorisations allocated		Average cabotage per author.	
	number	% of total	1000 tkm	% of total
B	6292	7,4	61,0	17,3
DK	6106	7,2	23,2	6,4
D	10318	12,1	10,1	4,7
EL	2785	3,3	0,0	0,0
E	6525	7,7	3,4	1,0
F	8531	10,0	29,8	11,4
IRL	2837	3,3	2,8	0,4
I	8539	10,0	5,4	2,1
L	2934	3,4	67,8	8,9
NL	8888	10,4	83,9	33,5
A	4256	5,0	7,6	1,5
P	3701	4,4	3,9	0,7
FIN	3063	3,6	20,0	2,7
S	4018	4,7	37,8	6,8
UK	5355	6,3	8,6	2,1
FL	57	0,1	7,2	0,0
N	870	1,0	14,0	0,5
Total	85075	100	26,1	100

Source: DG TREN

Estimates in italic

Interesting is also the ratio between authorisations allocated and the final share in cabotage transport: with 10% of the authorisations allocated, hauliers from the Netherlands performed 34% of the total cabotage. Similar ratios can be observed for Belgium and Luxembourg (see Table 2). France shows a balanced ratio in 1997: with 10% of the authorisations, French hauliers performed 11% of the entire cabotage.

On the other end, despite having been allocated 10% of all authorisations in 1997, Italy is only responsible for 2% of the entire cabotage transport. A low activity is also observed for Germany, the United Kingdom and Ireland.

The so-called 'low labour cost' countries (Greece, Spain and Portugal) together were allocated 15% of all authorisations in 1997, but were responsible for only 1.7% of total cabotage that year. Data from Spain should be looked at cautiously, since figures had to be estimated; even just prior to that, there were signs of under-reporting. Spanish hauliers might thus be somewhat more active than indicated.

Where does cabotage take place ?

The first section of this publication tried to answer the question of 'who' is undertaking cabotage. This section will focus on the question 'where' this type of

transport takes place.

Table 3 shows the volume of cabotage transport in the various countries subject to the cabotage regime.

Table 3: Cabotage transport by country in which cabotage takes place – in 1000 tkm

"Partner State"	1991	1992	1993	1994	1995	1996	1997	Jan.- June 1998	1997 - share (%)
Belgium	16 741	23 172	11 232	21 806	30 967	28 849	31 677	12 310	1,4
Denmark	2 989	2 310	4 357	1 009	1 909	4 683	2 395	1 070	0,1
Germany	402 470	470 038	578 950	785 512	1 229 711	1 417 816	1 516 105	687 969	68,2
Greece	83	368	3 132	4 199	7 717	10 168	22 530	5 766	1,0
Spain	14 835	21 871	34 900	35 332	47 332	56 977	76 839	35 738	3,5
France	54 737	61 439	107 128	151 304	200 319	306 064	297 410	135 865	13,4
Ireland	4 965	5 489	3 119	3 653	5 476	6 807	7 614	1 653	0,3
Italy	98 633	103 194	89 483	84 907	71 033	80 967	121 277	53 153	5,5
Luxembourg	115	306	464	262	665	559	1 239	1 031	0,1
Netherlands	13 398	12 286	5 609	5 644	8 692	11 504	11 489	3 677	0,5
Austria	.	.	.	.	.	.	10 797	4 302	0,5
Portugal	920	9 996	14 537	8 115	8 874	9 526	8 474	4 064	0,4
Finland	.	.	.	138	1 506	609	2 187	494	0,1
Sweden	.	.	.	4 977	13 224	22 766	40 602	25 699	1,8
United Kingdom	35 648	34 620	27 890	36 935	41 548	42 805	50 677	21 974	2,3
Liechtenstein	.	.	.	.	0	0	5	2	0,0
Norway	.	.	.	1 786	7 740	13 761	22 504	14 841	1,0
TOTAL	645 534	745 089	880 801	1 145 579	1 676 713	2 013 861	2 223 821	1 009 608	100

Source: DG TREN

It appears that Germany is the country where most cabotage transport occurs. Ever since its introduction, the number of cabotage tonne-kilometres has been increasing and reached 68% of the total cabotage in 1997.

France was the second most 'cabotaged' country in 1997 with a share of 13%. Italy, at the beginning of the 90's the second most 'cabotaged' country, follows with 5.5%. These three countries together stand for 87% of the entire European cabotage. All other countries are obviously less 'preferred': apart from Spain with a clear upward trend (3.5% of the entire cabotage in 1997), progression is less steady.

The question raised here is the effect of cabotage in national transport. The penetration rate expresses the share non-resident hauliers take in a national market. Table 4 shows the penetration rates between 1991 and 1997.

It appears that cabotage transport plays only a

insignificant role. The overall penetration rate rose steadily from 0.09% in 1991 to 0.25% in 1997. A look at the individual countries is interesting: Germany, as most 'cabotaged' country, sees nearly 0.75% of its domestic transport performed by non-resident hauliers. Luxembourg, as one of the leading caboteurs, 'looses' 0.34% of its domestic market to foreign hauliers, France gives way 0.21%. In all other countries, the penetration rate lies below 0.2%.

Figures in Table 4 suggest that the penetration rate dropped slightly to 0.22% for the first half year of 1998; however, this is considered to be due to underreporting.

The often expressed fear that cabotage would severely disturb national transport markets remains unfounded. Provisional results from sample surveys for the period after the quantitative restrictions were lifted indicate that there is no "explosion" in cabotage transport.

Table 4: Cabotage penetration rate - in parts per thousand

	1991	1992	1993	1994	1995	1996	1997	Jan.-June 1998
Belgium	1,26	1,68	0,77	1,25	1,63	1,68	1,76	1,34
Denmark	0,33	0,25	0,50	0,11	0,21	0,50	0,25	0,21
Germany	2,18	2,50	3,14	3,98	6,11	7,12	7,46	6,78
Greece	0,01	0,04	0,27	0,39	0,62	0,81	1,73	0,87
Spain	0,21	0,30	0,46	0,46	0,60	0,75	0,98	0,89
France	0,46	0,50	0,91	1,22	1,48	2,24	2,14	1,87
Ireland	1,18	1,17	0,74	0,83	1,22	1,45	1,62	0,69
Italy	0,69	0,71	0,63	0,58	0,44	0,49	0,71	0,61
Luxembourg	0,29	0,61	0,93	0,52	1,33	1,40	3,10	5,16
Netherlands	0,58	0,46	0,22	0,22	0,32	0,42	0,42	0,26
Austria	.	.	.	.	.	.	0,96	0,74
Portugal	0,08	0,94	1,45	0,72	0,80	0,84	0,74	0,69
Finland*	.	.	.	0,01	0,07	0,03	0,09	0,04
Sweden*	.	.	.	0,40	0,48	0,76	1,29	1,81
United Kingdom	0,29	0,29	0,22	0,27	0,29	0,29	0,34	0,28
Liechtenstein	.	.	.	.	.	.	.	.
Norway*	.	.	.	0,43	0,82	1,32	1,94	2,52
TOTAL	0,90	1,03	1,22	1,40	1,94	2,32	2,46	2,19

* 1994 figures relate to July to December (adhesion to cabotage regime)

Source: DG TREN

Leading "caboteurs"

The matrix below (Table 5) gives a complete overview of the activity of the various hauliers in the

countries where cabotage is allowed. Data refer to the period January 1996 to July 1998.

Table 5: Cabotage by relation – in 1000 tkm (Period: 01/1996-06/1998)

Hauliers from:	Cabotage transport performed in:																TOTAL	
	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	FL		N
B		359	388938	245	6917	433386	30	19336	2	194	420	20	71	983	50228	0	0	901129
DK	364		258249	0	267	1217	0	1214	0	1365	0	1755	924	34619	4119	0	19790	323883
D	10802	604		30709	20533	55388	0	67930	852	15721	12539	774	5	3718	4578	5	339	224497
EL	0	0	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0
E	10	0	2710	0		35580	0	600	0	0	0	16700	10	0	0	0	0	55610
F	55293	5	336463	1615	69932		0	136104	1955	1122	0	1605	0	32	7674	0	0	611800
IRL	6	0	6526	0	0	124		0	0	0	0	0	0	294	23479	0	0	30429
I	144	110	98159	55	3842	13135	0		0	240	0	76	0	140	1723	0	0	117624
L	0	181	462609	0	820	4672	0	5989		0	0	238	0	0	0	0	0	474509
NL	1734	4413	1542995	21	32500	121753	335	8665	3		1034	500	101	14135	22743	0	1672	1752604
A	129	0	36046	0	54	263	0	9937	3	153		27	0	1096	28	2	0	47738
P	79	24	93	0	32422	3098	0	208	0	2	0		0	0	7	0	0	35933
FIN	3	1866	126303	0	507	78	0	218	0	40	1	0		19770	0	0	6747	155533
S	86	530	341936	0	242	124	0	353	0	105	0	9	2178		877	0	22558	368998
UK	4152	0	6729	5819	1515	70519	15709	4828	0	7710	0	303	0	706		0	0	117990
FL	22	0	886	0	0	0	0	0	0	0	1104	0	0	0	0	0	0	2012
N	12	56	13248	0	3	2	0	15	14	18	1	57	1	13574	0	0	0	27001
Total	72836	8148	3621890	38464	169554	739339	16074	255397	2829	26670	15099	22064	3290	89067	115456	7	51106	5247290
share (%)	1,4	0,2	69,0	0,7	3,2	14,1	0,3	4,9	0,1	0,5	0,3	0,4	0,1	1,7	2,2	0,0	1,0	100

Note: Austrian data relate to period 1.1.1997 – 30.6.1998

Source: DG TREN

The last row of Table 5 expresses the country share of the entire cabotage transport volume. It indicates that the global image one gets of this 30-months period is roughly the same as the one presented in

Table 3 of the previous page (share in %, last column, which data relate to the year 1997 only). The matrix enables however to identify the main single relations.

The "top-10" looks as follows (in brackets: share in total cabotage, i.e. by all hauliers in all States):

1. Dutch hauliers in Germany	(29.4%)
2. Luxembourgish hauliers in Germany	(8.8%)
3. Belgian hauliers in France	(8.3%)
4. Belgian hauliers in Germany	(7.4%)
5. Swedish hauliers in Germany	(6.5%)

6. French hauliers in Germany	(6.4%)
7. Danish hauliers in Germany	(4.9%)
8. French hauliers in Italy	(2.6%)
9. Finnish hauliers in Germany	(2.4%)
10. Dutch hauliers in France	(2.3%)

These combinations together account for 79% of all cabotage.

Cabotage reporting under the new Road Statistics Regulation

With the deregulation of cabotage in mid-1998, administrative data is no longer available to monitor cabotage operations; hence a new form of data collection is required. Cabotage data are now obtained via the regular sample surveys on road freight transport, which all Member States have carried out for many years. The Council Regulation (1172/98) on road freight transport statistics provides for the transmission of data on all types of transport operations, including cabotage operations, replacing an earlier Directive which did not cover cabotage.

Reporting under Regulation 1172/98 started officially on 1.1.1999, but some Member States provided cabotage data from sample surveys on a voluntary basis from 1997 onwards.

Table 6 gives an overview of quarterly data from June 1997 to the end of September 1999. Certain countries were able to supply data emanating both from the administrative records (cabotage regulation) and the sample surveys (figures in brackets).

Table 6: Cabotage data for the period from July 1997 and September 1999 for selected countries - in 1000 tkm (Period Q3/1997 to Q2/1998 : administrative data - in brackets: sample survey data Period Q3/1998 to Q3/1999: sample survey data only)

Reporting State	1997		1998				1999		
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
Belgium	93007 (165691)	85596 (138843)	85 516	76 118	:	:	:	:	:
Denmark	39 360	44 859	43 675	39 850	:	:	:	:	:
Germany	28291 (136000)	27054 (126000)	24365 (227200)	23765 (249800)	218 500	246 500	344 100	333 900	342 500
Greece	0	0	0	0	:	:	:	:	:
Spain	5 561	5 561	5 561	5 561	:	:	48 874	59 686	61 847
France	66412 (61098)	62457 (53562)	57818 (103985)	67524 (120747)	117 246	187 976	180 397	217 478	159 420
Ireland	1 879	1 159	2 684	2 384	:	:	:	:	:
Italy	9 207	11 741	11 698	11 884	:	:	261 000	:	:
Luxembourg	49 434	39 626	58 942	70 133	:	:	:	:	:
Netherlands	210900 (337332)	151217 (344817)	148961 (360918)	137225 (400367)	337 607	:	354 656	:	:
Austria	9019 (52072)	7606 (66171)	8 804	6 619	:	:	:	:	:
Portugal	2704 (10179)	6853 (3203)	7017 (12857)	4794 (5598)	21 957	21 469	11 135	22 588	42 875
Finland	15 956	13 631	16484 (8252)	18896 (17459)	9 371	8 104	522	3 000	10 000
Sweden	36 552	36 489	29736 (3574)	28597 (8277)	:	:	10 360	1 735	3 761
United Kingdom	5486 (12476)	7723 (9478)	6253 (11574)	2508 (18284)	7 724	9 952	12 650	13 335	9 581
Liechtenstein	8	120	687	781	:	:	:	:	:
Norway	2563 (2758)	1964 (1660)	2110 (2213)	2658 (880)	774	2 648	:	:	:
TOTAL	576 339	503 656	511 401	499 297	:	:	:	:	:

Figures for some countries show considerable differences; however, when only sample survey data are observed through the entire period covered in Table 6, the differences are far less noticeable. Hence the conclusion that cabotage did not 'explode' after the complete liberalisation as from the 3rd quarter of 1998.

The Netherlands for instance, traditionally a leading

'caboteur', reported 354 656 tkm for the first quarter of 1999 compared to 360 918 tkm for the same period in 1998.

The comparison of the data from the Cabotage Regulation with that received so far from the sample surveys indicates that there was increasing under-reporting in the Cabotage Regulation.

Table 7 outlines the total cabotage figures taking into account adjustment factors (cf. last line of table 1 for unadjusted figures and methodological notes for factors applied). Consequently, the overall penetration rate of cabotage in national transport markets in the EEA area would rise to about 0.40% (0.25% without adjustment) in 1997 and about 0.52% (0.22% without adjustment) in 1998.

In absolute terms, the adjusted data show a large increase in total cabotage over the period 1991-1998, but even in 1998, national transport by resident hauliers would still be more than 190 times larger than cabotage (estimated on an annual basis).

Table 7: Total cabotage by hauliers from all States – adjusted (in 1000 tkm)

	1991	1992	1993	1994	1995	1996	1997	Jan.- June 1998
TOTAL	645 534	745 089	880 801	1 145 579	1 676 713	2 215 247	3 558 113	2 423 059

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The possibility of undertaking cabotage transport was outlined in Council Regulation (EEC) N° 3118/93, "laying down the conditions under which non-resident carriers may operate national road haulage services within a Member State". Quantitative restrictions (quotas) were imposed from its introduction. Quotas (through the granting of authorisations) have been gradually increased and were completely abolished on 1 July 1998. Intra-Benelux cabotage was completely liberalised in 1992.

Following the creation of the European Economic Area, the cabotage regime was extended to the EFTA States (except Switzerland) on 1 July 1994, however excluding Austria (which joined on 1.1.1997). Liechtenstein joined upon accession to the EEA (1.5.1995). The abolition of quantitative restrictions applies to the EEA as a whole.

Data supplied under the Cabotage Regulation

The Regulation prescribed that record books should accompany cabotage authorisations. These books provide the data for the compilation of statistics on the use of cabotage authorisations. Each reporting country has to supply quarterly data to the Commission relating to cabotage movements performed by vehicles registered in the reporting country.

The content of the present Statistics in Focus deals largely with the last full year of cabotage data available, i.e. 1997. All reporting States supplied data for this period, except Spain, for which data had to be estimated.

Data for Iceland

As an EEA Member, Iceland is part of the cabotage regime. However, Icelandic hauliers have not been performing cabotage transport, despite being allocated 23 cabotage authorisations in 1997. In the interest of clarity, the various tables have disregarded Iceland. It should however be noted that for Table 2, the total number of authorisations allocated is 85098 (85075 without Iceland)

Calculation of penetration rates

In order to be able to calculate penetration rates in national transport, tonne-kilometre data had to be supplied from

other sources than those resulting in the reporting on cabotage.

"Hire and reward" and "Own account" transport

Commission Regulation (EC) N° 792/94 of 8.4.1994 extended the cabotage regime to "own account" hauliers. Data in this bulletin refer to "own account + hire and reward" and do not make a split between the two categories.

Adjustment factors

The adjustment factor for 1997 (1.6) is based upon data for 10 States (D, F, B, NL (both excluding intra Benelux), UK, DK, N, FIN, S and A) accounting for 88% of the entire cabotage transport carried out in 1997. The adjustment factor for the first half of 1998 (2.4) is based upon data from 8 States (D, F, NL (excluding intra Benelux), UK, P, N, FIN and S), accounting for 58% of the cabotage carried out during the first half of 1998. The factor for 1998 should thus be regarded as provisional. For 1996, an adjustment factor of 1.1 was applied.

Data used to calculate the adjustment figures for 1997 and 1998 take into account sample survey data that became available after the publication of the COM(2000)105 report.

Sample survey data

All sample survey data on cabotage are based on small numbers of observations and therefore have a high margin of uncertainty. For some Member States, the cabotage data might include small volumes carried in non-EEA countries.

This publication

is essentially based on two reports – COM(2000)105 and COM(1998)47- prepared by Keith Crawford, Directorate General for Energy and Transport (TREN) on the implementation of Council 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)".

This publication was prepared for Eurostat by Jelle Bosch, Artemis Information Management.

Further information:

➤ Databases

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