International Road Freight Transport in France: Experiences from Germany, the Netherlands and Driver Costs Analysis

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Abstract. *These last few years, French international road freight transport has been undergoing a loss of influence within Europe while traffic has increased and great manoeuvres are taking place since the opening of the European Union towards East. Some of the French transporters are then focusing back on the French market showing a worrying loss in competitiveness. On the contrary, German and Dutch companies are increasing their shares in the French market and have reorganized themselves within Europe to face Eastern Europe competition: follow-up on customers delocalizing in the East, networking, hyperproductivity, markets segmentation between high quality transport in the West, specific markets and low cost segment in Eastern Germany and East Europe (Poland, Romania,…), intensive geographical closeness to a great harbour (Rotterdam)… What should France learn from German and Dutch experiences?*

On the basis of a comparison of our neighbours' driving costs and road freight transport structure, our contribution – a synthesis of two recent studies ordered by the Comité National Routier (CNR, studies free to be downloaded by www.cnr.fr) – will first propose a cooperation with German or Dutch companies in order to propose a winner-winner model based on exchange of competencies: North Africa (Morocco for instance) and Southern Europe for French partners (specialization Storage - Logistics) and transport business model and opening towards the East for the German and Dutch partners.

Keywords: international road freight transport; Germany; the Netherlands; driver costs.

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The year 2007 and 2008 have been in France a full one in terms of studies, debates and propositions, in order to understand, accompany and relaunch international road freight transport in France, in particular as far as its engagement towards international markets is concerned, one that has been undergoing a downfall these last few years. Within the framework of the actions undertaken by the Conseil d'Analyse Stratégique (www.strategie.gouv.fr), many reports have been published (9 reports at all that is to say 875 pages!): they offer a full analysis of road freight transport in France but also internationally. The synthesis presented by Claude Abraham and his team – "For an ongoing regulation of road freight transport(1)" – and the reports of the different working groups(2) have been going through a wide consultation of all actors and show the need to compare the French situation with that of our European partners(3) in order to learn a lesson for the French transporters.

Within the framework of market intelligence missions and prospective analysis of the sector led by the Comité National Routier (CNR) some investigations have been undertaken in 2007-2008 on road freight transport and driving costs in Germany and Holland by the author, directed by Alexis Giret (CNR). This article proposes a synthesis of those two studies.

Methodology and French situation

The study's methodology relies on a series of meetings/discussion led among road freight transport professionals (around 10 companies by country in more than three different regions for every country) but also among professional organizations, trade unions, the university community and public institutions (Ministry of Transport). Statistics have been obtained among appropriate organizations, public ones in Germany (BAG - Federal Office for Freight Transport, or professionals road haulage associations (BGL, DLSV in Germany and TLN in Holland) or private/semi private ones in Holland working for the Dutch Transport Cabinet (NEA, NIWO). Costs assessments are a synthesis of crossed-information (BGL information), average values and estimates for Germany and panel results (NEA information) for Holland.

The starting point of the interest of professionals and French public institutions in the study of international road freight transport in Germany and Holland originates in the worrying observation in France of a decrease of French companies' market share in international road freight transport. In 2007, the French international road freight transport has decreased by 3.2% in t.km (27.2 billion t.km) following a stabilisation noticed in 2006. In tonnes, the decline is 1.4% by 2007/2006. Cabotage of French companies is also declining by around 24% in 2007! This lack of competiveness is part of a long trend: while, between 2000 and 2004, international exchanges between France and its 15 European Union's partners have increased by 17%, French transport companies has undergone a drop by 17% [4]. This drop can be explained partly by the decreasing share of French transporters in French international exchanges. French transporters have lost 3 points in market shares every year, dropping from 35.9% in 2000 to 25.5% in 2004. The increase in imports, for which French transporters have found it difficult to position themselves, is acting against French transporters. Despite a moderate increase in exchanges with Germany (+9%) which explains more than a third of the decrease of French transporters[4], French transporters' market share dropped by 12 points and German transporters are reinforcing their position as well as third parties (among which Dutch transporters) who have seen their activities progress by 50% since 2000[4]. This situation is to be seen on the field specifically in Germany and can be partly explained with the introduction in 2005 in Germany of a pricing policy for the use of motorway infrastructure which has induced an increase in transport costs for French transporters and more particularly when return is an "empty" one. This factor has thus been well identified by the German authorities of the sector in its annual report: since the introduction of toll on motorways (2005), the annual report 2005 of the Federal Freight Road Transport Office (BAG, p. 13) is expressing that French companies are less present in Germany which gives German transporters more development opportunities.

The screening of German and Dutch long distance freight road transport markets is very interesting in terms of their engagement at the heart of Europe in a hard competition with the European Union's New Member States. It is thus interesting to see how in both countries a whole sector, well organized and structured (in terms of legislation and socially), has reacted to this external impact. Commercially speaking these newcomers show a hyperdynamism, as we will see.

Focused on its internal market, the road freight transport in France seemed protected from "big manoeuvres" developing today in the East and South (Maghreb) but this fact is no longer true: French road freight transport is now confronted with a double compression from both East (Germany, The Netherlands, East Europe) and South (Spain) on the international market but also as far as national transportation is concerned when limits on "cabotage" will be abandoned. Moreover, this compression is far from being a static one and thus it is in the framework of both an eastern and southern compression that the French freight road transport should be studied.

This situation could legitimately lead us to question the existence of French long distance road freight transport in the long term. Which strategic direction should we impulse to take advantage of the Europeanization of road freight transport on the European continent?

- Network strategies like suggested by German middle-sized companies;
- Concentration and search for a critical mass around big road/rail/sea intermodal groups;
- Withdrawal towards market niches;
- Specialization in more profitable high quality and standards transports;
- Closeness to a requalified and modern harbour (Holland).

or what we recommend: first a merging with Dutch and German companies in a European winner-winner perspective, taking into account the necessity of protecting competition, and, in a second best solution, a quick setting up of subsidiaries in Morocco or in Southern Spain in order to segment one's global transport supply (low cost/ niches/high-rank) and thus rebalance the

Center-East stream with a South-East powers… A Centre-Mediterranean answer to a freight road transport critical mass moving towards the Centre-East.

At the centre of Europe: a German economy fully exporting and a harbour for Europe, Rotterdam

Leaving aside the current crisis linked with petrol prices (july 2008) and financial market (september-october 2008), the road freight transport sector is not feeling to bad at the centre of Europe and enables Holland and Germany to position themselves as leaders in this field (table 1) for three fundamental reasons: a real dynamism of the German economy towards exports these last few months, the large outsourcing of subsidies and plants in East Europe linked with the new process of "Bazar Economy" described by H.-W. Sinn which imply a lot of transport between all the plants and subsidiaries all over Europe and the world, and a very profitable industrial woldwide positioning (success of a the famous structure of middle size companies likely to exports widely) and, for Holland, predominance of a great harbour for European inward and outward flows, this harbour being very closely connected with the German industrial structure. In the field of freight transport, the completion in 2006 of the freight railroads "Betuwelinie" between Rotterdam and Germany is considered essential.

Table 1

Road freight transport in France, Germany and the Netherlands in 2004/2005

	France (2005)	Germany (2004)	The Netherlands (2005)	in...
T.km road freight transport on national territory	205	**384**	84	Billion t.km
- from national companies	177	267	32	Billion t.km
National companies in international t.km	**28**	71	**52**	Billion t.km
T.km freight rail transport	41	86	5	Billion t.km
T.km watervay	9	64	42	Billion t.km
Number of companies	36 000	48 500	12 000	
Trucks	185 500	345 500	77 500	(more than 3.5 t.)

Source: Alexis Giret and Laurent Guihéry, Synthesis Study CNR Europe, march 2007.

For Germany, road freight transport is leading in Europe (table 1) which is easy to understand with the very central location of Germany in Europe between West and East. The reason for this are multiple but the main factor is the dynamic structure of middle size companies ("*Mittelstandunternehmen*") typical of German industrial and service oriented sector. These companies employ 72% of the 22 millions employees and are making 50% of investment. German road freight transport is twice the French sector (see table 1) and is growing quite well the last years (lack of drivers for the shipping of presents for Christmas 2006) like in Holland. Transport for third parties is important but some companies are thinking of "re-nationalizing" transport operation (own account) to keep 100% reliability, punctuality and full efficiency of transport operations, which is in Germany presented as a label: "transport made in Germany". This label is very important for shippers working with just-in-time model of production. Sales of below 12 tons vehicles are booming because the new motorway toll implemented in 2005 do not take these vehicles into consideration.

German transport companies are organized in both way: a high proportion of family and small companies organized sometimes outside the system of collective labour, middle size companies organized on a European network, and large operators like Schenker. Like in the Netherlands, the structures of companies in Germany is based on a dual system following the model of "insider" (protected/collective labour agreement)/"outsider model" (small companies, high flexibility and reactivity, lack of job security).

Costs in Germany are higher than those corresponding in France but this is changing rapidly: trucks are 10% more expensive than in France, gasoline more expensive (+6.6%, data CNR), indirect taxes ("*droits d'accises*") higher up to 20%, higher cost of insurance, toll pricing on motorway of around 0.20 cents euro/ km since the 1 January 2005 (increased in January 2009) but this new costs was transferred on the shippers. Truck involvement is around 130,000 km/year more than 120,000 km reported in France (CNR). Wages are ruled by a labor agreement negotiated at the Länder level which implies disparities between East and West Länder. It can be noticed that "low cost" transport companies are existing in East Germany facing directly East European competition. East German drivers can then be paid 30 % less than in the West when labour agreements are applied which is not the case every time. The daily rate in Thüringen is 6.14 euro one hour without length of service. West German transport operators are then mainly focused on "high quality transport" with high profitability and are likely to outsource transport operations in their East European or East German subsidiaries. Comparing productivities and wages of drivers, there are few differences between Germany and France … but a German driver seems to drive 22 % more than a French one by using a more "company friendly way of driving" (few time of disposal, switching mainly between time of rest and time of driving). Following strictly European regulations and working for a flat rate imply a maximal management of driving time which is one of the lessons to draw of the competitive advantages of German and Dutch drivers.

Concerning Netherlands, road freight transport is growing rapidly in NL with 7% growth each year in average. The Dutch Ministry of Transport is expecting a growth of 20% – 30% by 2020. 12,000 companies are involved with 80% specialized on international transport (70% transport for others). The Dutch are very specialized in international transport with more t.km in international transport than in national transport! The international road freight transport in Holland is then twice the French one: Dutch operators carry 57% of their exports like France for 15 years but Dutch operators are also leading in imports (52%!), which is surprising! More than Germany, the Netherlands are THE reference in terms of hyper-productivity in road freight transport: linked with the framework of the "polder model" (liberal way of life, entrepreneurs spirit, consensus, negotiation, compromises, flexi-security social system, dual system following the model of "insider"(protected/ collective labour agreement)/"outsider model" (small companies, high flexibility and reactivity, lack of job security)) and far away from public interventionism, the labor relations in Dutch road freight transport are managed by a system of collective and autonomous labour agreement (see TLN and the 112 pages of their very precise labour convention 2007). The daily rate is 9.84 euro while beginning to work till 12.54 euro after six years of work in the same company (value October 2006): 40 hours a week; +30% if overtime; + 50% if worked on Saturday; +100% if work on Sunday.

Operating costs are higher: buying a truck seems o be a little bit more expensive than in France, insurance are 50 % higher, gasoline and maintaining/repairing are around 5% less expensive. As expressed in the table 2, driving cost are widely higher and are one of the higher in Europe and this positive point for employers are compatible with a leading position of Dutch operators in Europe.

To sum up, it seems that the Netherlands have set up a winner – winner model:

- Wages (50% more than a French driver in average);
- Competitiveness (despite an hourly cost 8 % higher than a French driver specialized in international road freight transport);
- Large turnover and jobs available: lack of drivers is a reality.

The success of the Dutch transport operator in international operation is then based on a high volume of work (trucks are then driving till 150,000 or 180,000 km/year and a high flexibility of the labour organisation of drivers, which lead to a competitive advantages of Dutch operators on the European market. Drivers are, in Germany and in The Netherlands, maybe more implicated in the success of the company by choosing "driving time" position or "rest time" position more than "*disponibility time*" on the tachograph. The yearly working time is around 213 days like in France. But differences are obvious in the organisation of companies looking for productivity gains, management of tours and efficient allocation of drivers: normal day of work in this sector can reach 11 hours a day, weekly working time near 55 hours (reaching 60 hours in certain cases),... On this point, due to the central position of Rotterdam Harbour in European Transport facilities, the European Commission has given an additional delay since march 2010 (5 years more) to transfer the European Guideline 2002/15 (limit of working time of freight road driver to 48 hours a week in average).

Hyper productivity of Dutch and German companies

In both Germany and The Netherlands, transport operators are hyper productive and put gains of productivity at the centre of their business management. For middle size companies, they develop networks of companies for achieving a better critical weight and a better visibility. They get more concentred too. Table 2 is expressing this hyper productivity of German and Dutch operators by showing a compared analysis of driver costs in four European countries. Methodology of the study was introduced in introduction of this paper. For Poland and France, data are coming from the CNR. East Germany can appear as a "low cost region" in Western Europe facing directly East European competitors but are full part of the famous German label of "Transport made in Germany". Western German companies are then outsourcing easily unprofitable or complicated transport operations to their East German subsidiaries for the benefit of both shippers and transport companies, both in West (keep competitiveness) and in East (having some work in a difficult economic framework).

Table 2

Main results of the study on driving costs in Germany and the Netherlands, in comparison with France and Poland (2006)

Estimations	Unit	France: study CNR	Germany: West Länder (average)	Germany: West Länder (maximum)	Germany: East Länder (minimum)	Netherlands (Source: NEA data international to France) and own adjustments;	Poland (estimation 2006 CNR; rapid growth)
Wages (with overtime and bonus)	€/month	2173	2734	2967	1718	3223	from 820 to 1,360
Employers charges	%	36 (Fillon support deducted)	25	25	25	36	22.57
Travelling expenses in average by day	€/day	38-40 Average with 50 % international	20	20	20	40 international -7 national	from 25 to 40
Total yearly cost	€/year	44 173	45 463	48 960	30 425	55 132	20 000
Weekly working time	Hours/week	49,6	56,5	56,5	56,5	55	56,5
Number of working weeks by year	Week/year	42	42	42	44	43	45 to 46
Yearly working time	Hours/year	2100	2373	2373	2486	2343	2500
Yearly driving time	Hours/year	1554	1890	1890	1980	1917	2015
Cost of one hour of work	€/hour	21	19,2	20,6	12,2	23,5	8
Cost of one driving hour	€/hour	28,4	24,1	25,9	15,4	28,8	10
Base 100 France on the driving hour		100	85	91	54	101	35

Source: Studies CNR Europe, data CNR, own calculations and cross comparisons, firms and university interviews.

Driver costs are showing high differences in Europe, especially from East to West Europe. But driver costs do not seem to play the key role, as the Netherlands are experiencing high costs of drivers and are leading on this market: quality of services, organisation of the business and management, reliability (label "transport made in Germany" for example) and level of productivity are also important.

Looking to road freight transport in Germany and the Netherlands: which recommandations?

Germany and The Netherlands are leading in international road freight transport in Europe today and are facing a strong competition from East European countries. They are pioneers in reaction and strategies developed facing new member's states and French operators can then learn from them.

Objectives are, like the history of the European Union Integration process, to balance benefits and risks among European nations in a long term process of mutual convergence. If we consider that the competency of international road freight transport is a key function of each nation states and then cannot disappear in France (no total specialization on the European level in the transport sector is likely to emerge – this assumption has to be investigated –, then we can propose some recommendations for French transport companies and public authorities.

Road freight transport in Germany and Holland is dynamic and successful since the joining of the New Member States in the European Union (opportunities), even if the competition is becoming stronger and profitability low (or negative like in Holland in average). Companies in both countries are facing a lack of drivers. "Cabotage" is, in a short future, challenging the future of French road freight transport, especially with Romania and Bulgaria. Ukraine, Turkey and Russia are also in a middle term perspective also formidable partner.

Facing this new European environment, German and Dutch companies have developed interesting strategies:

- Following of industrial companies in the outsourcing of production process in East Europe (especially Germany); Transport and logistic subsidiaries set up in East Germany (driving costs between 20 and 30% less expensive) or in East Europe with merging with local operators (driving cost inferior to 40% following a study of the BGL and the German Transport Ministry).
- Productivity gains if possible
- In Germany: decrease of average personal costs, maybe driving costs but difficult to show evidence on this point. Germany is the only country in Europe that has experienced an average decrease in wages the last 5 years (decrease of real wages of 0.8% the last 8 years (2000-2008, Source: foundation Hans Böckler, Les Echos, 18.09.2008). More and more workers (maybe drivers?) in Germany are not integrated in collective labour conventions, which have an impact on competitiveness. This trend is considered as "competitive disinflation" which has an impact on restoring cost-competitiveness of Germany the last years. This model is less transferable to France for socio-historical raisons (strong trade unions, lack of confidence between social partners,…).
- Networking of medium size operators to increase the critical mass and get more visibility; strategy to be developed with French operators; outsourcing of non profitable transport to small operators or East European partners, like in Germany.
- Better connection with ports (example of Rotterdam and European Distribution Center); balance development with other European ports to be investigated, especially with congestion issues in Rotterdam Harbour.
- Specialisation in high quality transport as the German operators do: reliability, punctuality, services (logistic, packaging,…), know how; "niche" market; label quality transport (like the famous "transport made in Germany").

Concerning the French transport operators, the development of European International Road Freight Transport implies a rapid and strategic reaction: if we consider and accept the process of European integration process as a complicated balance and trade-off between nation states in a winner – winner game – this was the case for the last 50 years of European integration, it is difficult to accept the disappearance of the French international road freight transport. Solutions has to be found in the merging of French operators with German and Dutch operators in a winner – winner model: giving access to south European or north African markets for central and north European operators and increase of critical weight for accessing East European markets for both French and Dutch/German operators. In a second best solution, if merging is unlikely to appear, French operators would have interests to "move South", by setting up subsidiaries in North Africa (Morocco). If this solution is likely to boost, on a short term perspective, the competitiveness of French international road freight companies, the impact of such strategies on the current European integration process (political integration) is difficult to assess.

Conclusion

These last few years, French international road freight transport has been undergoing a loss of influence within Europe while traffic has increased and great manoeuvres are taking place since the opening of the European Union towards East. Facing these new competition pressures in the East of Europe, German and Dutch companies are increasing their shares in the French market and have reorganized themselves within Europe to face Eastern Europe competition: follow-up on customers delocalizing in the East, networking, hyperproductivity, markets segmentation between high quality transport in the West, specific markets and low cost segment in Eastern Germany and East Europe (Poland, Romania,…), intensive geographical closeness to a great harbour (Rotterdam). Driver costs do not seem to play the key role, as the Netherlands are experiencing high costs of drivers and are leading on this market but quality of services and level of productivity are also important. The emerging organization of the European international road freight transport is then a long process and there a few evidences at this time that can predict this market in the future.

Notes

(1) http://www.strategie.gouv.fr/article.php3?id_article=838

(2) «Développement, compétitivité, et emploi »; chairman: M. Maurice Bernadet «L'acceptabilité sociale des poids lourds»; chairman: M. Jean-Noël Chapulut «Les relations et les évolutions sociales; chairman: M. Georges Dobias «Transport routier de marchandises et gaz à effet de serre»; chairman: M. Michel Savy.

(3) Germany, as France does, has a good knowledge of the sector through the mission of market analysis of the B.A.G. (Bundesamt für Güterverkehr, Cologne). As expressed in a meeting by the Dutch Ministry of Transport, The Netherlands have a strong liberal culture and then few interests of markets analysis of privates companies, for example in the transport sector. Some statistics of the sector for example are managed by NEA, a private company. TLN (Transport Logistic Nethelrands, the professional association of Dutch Road Haulage) is a key actor too, for statistics for instance.

(4) See Ministère de l'Equipement, du Transport et du logement, SESP, «La transport routier de marchandises en Europe en 2004: forte croissance du pavillon espagnol», 2006.

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