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REPORT ON THE PRESENT SITUATION
OF THE GOODS TRANSPORT MARKETS
IN THE COMMUNITY

C O N T E N T S

	<u>Pages</u>
INTRODUCTION	2
PART I -- THE PRESENT SITUATION	3
1. Transport regulations	4
2. Development in traffic	5
3. Development in means of transport	7
4. Trends in transport rates	8
PART II -- RESULTS	9
1. Contribution of the organization of the transport markets to the development of the common market	9
1.1. Changes in the demand for transport	11
1.1.1. quantitative changes	11
1.1.2. structural changes	11
1.1.3. changes in transport flows	12
1.1.4. changes in services provided	12
1.2. Relationship between supply and demand for transport on the market	14
1.2.1. the quantitative satisfaction of transport needs in commercial markets ..	16
1.2.2. the qualitative satisfaction of transport needs in the commercial market	19
2. Competitive situation of the market	21
2.1. General remarks	21
2.2. Abuses of dominant positions	22
2.3. "Gutthroat" competition	23
2.4. The effects of the competition situation on trans- port rates	24
2.5. Distortions in competition	25

	<u>pages</u>
3. Community integration of the transport sector	28
3.1. The common rules referred to in Article 75 (1) (a) of the Treaty	28
3.2. Access to national transport operations by non-resident carriers (Article 75, 1 (b) of the Treaty)	30
3.3. Implementation of the right of establishment (Article 52 et seq. of the Treaty)	31
4. The common organization of the transport markets in the context of work towards the general policy objectives	32
4.1. General remarks	32
4.2. Obligations to operate and to provide transport facilities	34
4.3. Tariff obligations	35
5. The effectiveness and suitability of State intervention in the common organization of the transport markets	36
5.1. The various types of rules governing capacity	36
5.1.1. Transport authorization quotas	36
5.1.2. The examination of individual requirements	37
5.2. The various systems of charging	38
5.3. The effects of tariffs on the price applied	39
5.4. The effects of rules governing capacity on the economic viability of the means of transport	41
5.5. Adaptation to the requirements of the market in time and space	43

INTRODUCTION

1. The report is in two parts and there are two annexes. In the first part the Commission analyses the present situation of the national and international goods transport markets (land transport only) in the enlarged Community in the light of the laws and regulations in force in the Member States and of the progress so far achieved at Community level.

In drawing up this analysis, serious difficulties were encountered, owing especially to the lack of resources and, more particularly the inability to monitor the markets in the enlarged Community. However, the complementary consultations with professional and socio-economic interests did not produce the information expected.

2. In the second part, entitled "Results", the Commission looks into just how far the operation of the transport markets has contributed to the objectiveness of the Treaty, especially of Article 2 thereof, as provided for in Article 74.

3. During the second quarter of 1975 the Commission submitted the report, for consultation, to governmental, professional and socio-economic interests. To the extent that the Commission agreed with the comments of representatives of these interests their observations have, to a large extent, been included in the altered document. In some cases, the principal observations have been marked with an asterisk at the foot of the corresponding page.

4. It is not the aim of the present report to justify the systems proposed for the operation of the transport markets as submitted by the Commission to the Council but it does allow the various Community bodies to determine objectively the transport situation in the different national and international goods markets. To this end it constitutes a document to accompany the proposals which the Commission is, in addition, submitting to the Council.

PART ITHE PRESENT SITUATION

5. The structure and features of the transport markets which can be discerned at Community level have been influenced in their development, although to different degrees, by the rules and regulations adopted by the national authorities and the Community institutions, and by agreements concluded by the Member States within other international organizations.

One should therefore have a fairly clear idea of the content of these regulations, and this information can be found in annex I to this report (Doc. VII/136/75).

6. Similarly, one should have some grasp of material developments in the systems governed by these regulations, as regards particularly traffic, means of transport and transport rates. The tables given in Annex II to this report (Doc. VII/137/75) supply some information on this aspect.

7. In this part of the report there is a brief analysis of this data and a classification of the principal trends of development in the systems over the last few years.

1. Transport regulations

8. Until recent years, national transport regulations grew out of the development of the various means of transport from the railway monopolies until the substantial development of road transport, by way of the economic crisis of the thirties.

For some years, there has been a general trend towards making these regulations more flexible in all transport sectors and in all the Member States, although the recent energy crisis and the growing awareness of the problems connected with the quality of life have increased the emphasis laid on the public service aspect of transport.

9. It is worthy of note, however, that while the problems have been basically the same in all the Member States, the solutions adopted have varied widely from one to another, leading to marked current differences. (*)

For instance, in the rail sector, in the United Kingdom and Ireland, there is a system of almost complete freedom as regards the formation of rates. By contrast, in the other Member States, railways are still subject to rules which are compulsory, though to widely varying degrees.

In the road sector, most Member States have adopted regulations concerning either access to the market, or transport rates and conditions, or both together. The United Kingdom has abolished all regulations regarding capacity and the formation of transport rates.

(*) The Group of the Nine railway companies of the BEC (the UIC group) comments that the various solutions adopted by Member States are based on divergent economic geographical and historical situations.

As regards measures on access to the market, certain Member States have simply imposed subjective conditions such as whether the transport undertaking is of good repute, whether it is of appropriate financial standing and whether it has professional competence. At present, the Member States generally require only one or two of these conditions to be met. Meanwhile, a Council Directive of 12 November 1974 (1) requires compliance with all these three criteria as from 1 January 1978.

Other Member States at the same time apply quota systems based on criteria connected with the situation of the markets or the individual needs of the enterprises.

As regards transport rates and conditions, strictly regulated tariff systems are to be found next to systems of complete freedom in rate formation.

In the waterways sector, access to the market is free except for national transport in one country. On the other hand, in the four continental Member States which have substantial inland waterways systems, a variety of provisions governs transport rates for national traffic, and in certain cases, transport is chartered under a "queue" system.

2. Development in traffic

10. Before we consider the problems relating to the organization of the goods transport markets, it would be worthwhile analysing the activity of the various means of transport within the enlarged Community. But statistics

(1) OJ No L 308, 19 November 1974.

available for the three means of surface transport within the nine Member States of the Community are not complete; they are not established on identical bases and therefore do not permit truly accurate comparisons. In addition these statistics are of a very global nature.

At present, only the transport statistics published by the UN (1) are sufficiently accurate to permit a number of preliminary observations on the overall development of goods traffic and the relative importance of the various means of transport within the enlarged Community. Statistics published so far by the SOEC (2) relate only to the six original Member States.

11. A study of the statistical tables 1 and 2 in Annex II (Doc. VII/137/75) leads to the following conclusions:

- (i) transport requirements have expanded rapidly in conjunction with economic expansion within the Community. For the ten years period of comparison adopted, 1963/1972, the index for total traffic expressed in tons/kilometres, taking 100 as the base, has risen to 144.
- (ii) the distribution of traffic among the four means of surface transport has been affected over these ten years by far-reaching developments in the transport markets.

One notes:

- a general fall in the relative share of the railways in all goods transport; in ten years, from 1963 to 1972, it fell from 38 % to 27 %. In the Netherlands and the United Kingdom, where competition is the most free, the absolute volume carried by the railways also fell (down 26 % in the Netherlands, down 16 % in the United Kingdom). The index for total volume stands at 101 in 1972 (1963 = 100).

(1) Annual bulletin of transport statistics for Europe 1972 (United Nations 1973).
(2) Statistical Office of the European Communities.

- decline in the share of traffic carried by waterway from 16 % in 1963 down to 13 % in 1972, though waterway traffic remains dominant in the Netherlands (56 % of total traffic), substantial in Germany (20 %) and in Belgium (23 %), of relatively little importance in France (8 %) and negligible in the other countries. The index of total volume stands at 124 in 1972 compared with 1963.

- a rapid growth in road transport (for hire or reward and on own account) whose share in total traffic rose from 44 % in 1963 to 50 % in 1972; the index for total volume stands at 163 in 1972 compared with 1963.

- a very rapid increase in transport by pipeline, whose share in the traffic rose from 2 % in 1963 to 10 % in 1972; the index for total volume stands at 609 in 1972 compared with 1963.

3. Developments in means of transport

12. Tables 3, 4 and 5 supply information on the developments in means of transport (commercial road vehicles and inland waterway vessels). One notes:

- Road transport: a substantial increase in the total number of road vehicles in the Community (up by 43 % in 1971 compared with 1962). This increase has occurred in all the Member States. It has been particularly noticeable in the Netherlands (+ 92 %), Italy (+ 68 %), France (+ 60 %) and Germany (+ 55 %). It has not been possible to break down these numbers for vehicles according to whether they are used for transport for hire or reward or for transport on own account. However, according to a partial figure supplied by the SOEC - table 4 concerning four countries only - the number of vehicles used on own account business is far higher than the number of vehicles used for hire or reward (four times as many in Germany, twelve times as many in France, four times as many in Italy and eight times as many in Belgium). On the other hand,

as regards capacity offered, the proportionate difference between these two forms of transport is much smaller (about 1.5 in Germany, 3 in France, 1.1 in Italy and 2.3 in Belgium).

For the reference period 1962/1971, own account transport has grown much more than transport for hire or reward; in Germany + 45.8 % as against 25.2 % for number of vehicles and 75.5 % as against 66.2 % for capacity, and in Italy + 133.7 % against 20.9 % for number of vehicles and 91.4 % against 22.8 % for capacity. In France and in Belgium the trend is reversed, though to a lesser degree.

- Waterway traffic: the total number of vessels has fallen: 61,500 in 1971 as against 69,800 in 1962. More detailed examination of the figures reveals that the number of barges fell - 13,200 against 22,200; but the number of lighters has more than doubled, 3,100 as against 1,400.

4. Trends in transport rates

12. The only fairly complete information available to the Commission relates to rail transport. Tables 6 and 7 show the trend in the average revenue per ton/kilometre per full wagon from 1963 to 1973. It can be seen that in all countries for which complete figures are available the index for these average revenues per t/km are lower than the indices for consumer price increases.

For international transport by inland waterway it has been possible to collect only a certain amount of very fragmentary information relating to Rhine transport (tables 8 and 9). This information would appear to indicate that Rhine freight rates have increased in about the same proportion as consumer prices.

It has not been possible to collect information concerning international road transport. There are German statistics for the prices applicable to national traffic but these figures cannot be compared with those of other countries. Under these conditions it has not been possible to follow up the suggestion made by the UIC.

PART II

RESULTS

The problem is to discover how far the operation of the transport markets at Community level, whose main material features are described in Part I of this report, has contributed, as stipulated in Article 74 of the Treaty, to the objectives laid down mainly in Article 2.

The results should be examined with regard to:

1. Contribution of the organization of the transport markets to the development of the common market
2. Competitive situation of the market
3. Community integration of the transport sector
4. Common organization of transport markets in the context of the advance towards the general policy objectives
5. Effectiveness of state intervention in the common organization of the transport markets

1. Contribution of the organization of the transport markets to the development of the common market

14. In its communication to the Council of 24 October 1973, the Commission stated that "the pursuit of the general objectives of the Treaty within the framework of a common transport policy requires the progressive introduction of coherent Community transport arrangements capable of meeting the requirements of economic union and of society, at the least cost to the Community. On the effectiveness of these arrangements will depend in large measure the optimum utilization of factors of production and development in the interests of improving living and working conditions".

15. If one wishes to study the present situation to discover whether and to what extent the provisions adopted so far at national and Community level have made it possible to achieve the objectives laid down for the common transport policy within the framework of the organization of the transport market, the following should be considered:

- a) the quantitative and qualitative changes which have occurred in the demand for transport in a continental market and in the light of changes in the economies of the Community,
- b) the ability of the present systems, based on the control of capacity and transport rates, to meet the demand for transport most effectively, taking account of the requirements laid down for the common transport policy, i.e.:
 - to reduce the cost of transport services and improve their quality,
 - to foster continuous adaptation to technical progress, profitability of the undertaking and the improvement of living and working conditions.

This part of the report attempts to supply an answer to these questions.

1.1. Changes in the demand for transport

1.1.1. Quantitative changes

16. The creation of the customs union, the progressive establishment of economic union and the favourable growth of the economies of the Member States have brought about a substantial increase in production and trade; the demand for transport has followed this expansion which continued without a break until the economic crisis of 1974.

This development is shown in figures in table 1 of Annex II.

1.1.2. Structural changes

17. This expansion in demand has been accompanied by far-reaching changes in structures.

The main features of the last 20 years have been:

- the substitution of oil for certain conventional sources of energy such as coal;
- growing industrialization of the economies of the Member States, with the result that movements of raw materials and industrial products have been taking a growing share of transport activity compared with movements of agricultural products;
- a growing emphasis on the division of labour in the manufacturing process, leading to an increase in the amount of transport required for the various stages of this process;
- an improvement in the quality of life, which has considerably increased the market for certain consumer products which in the past were regarded as luxury products for a limited market.

All these elements have profoundly changed the traditional composition of the demand for transport and have brought about the need for new equipment, sometimes very specialized and for rapid and regular transport, a substantial development in combined transport and a greater integration of transport in the production process.

1.1.3. Changes in transport flows

18. The shift of the iron and steel industry towards coastal areas and, on the contrary, the setting up of refineries on inland sites nearer to the distribution markets for industrial products, the creation of poles of industrial development in certain regions which were largely agricultural in the past - these are the most obvious features (the tip of the iceberg, as it were) of a profound change in the traffic flows in Western Europe.

The result has been a new distribution of traffic movements among the various means of transport resulting in particular from their ability to adapt to a new market situation. For instance, the decline of coal, the shift towards seaports of new heavy industry (iron and steel and chemicals) which deprives the internal transport networks of substantial traffic in fuel and ore, the development of pipelines for transporting oil products (crude and refined) have militated against surface transport and in particular against the railways.

1.1.4. Changes in services provided

19. The lengthening of the production processes for a growing number of goods produced - by a long series of complex and costly processes whose value greatly exceeds that of the original raw material, the strategic

function of stocks, the cost of money - all these are factors which have profoundly modified the relationship between the time and rate factors in transport.

In other words, such a competitive market as that of industry where production costs and the unproductive tying up of capital must be reduced to the minimum and the movement of capital must be speeded up, fast and regular transport services are henceforth by no means negligible factors in the production process.

The same trend characterizes the demand relating to transport of agricultural products, since the increase in the purchasing power of large sections of the population of the Member States has considerably enlarged some markets for agricultural products.

It follows that for a great quantity of industrial products the "quality" factor of transport (in terms of speed and the type of services provided) becomes more important than the "rate" factor. In addition the increase in the value of manufactured products means that there is a progressive reduction in the relative importance of transport rates in the price of these products. The combination of these factors goes some way towards providing an explanation for the changes in demand for transport and the changes in the respective importance of each method of transport.

A final factor, though less important than those mentioned above, should not be overlooked.

The growing number of production stages, the specialization of centres of activity, the establishment of multi-purpose storage depots with a fast turn-round of stocks - these changes in the distribution circuits have led to an increase in the transport of small loads, where rapid delivery is often needed; for this type of traffic road transport is more flexible and has the advantage of supplying better door-to-door services than the railways.

1.2. Relationship between supply and demand for transport on the market

20. After the foregoing brief outline of the fundamental changes which have come about in the volume, structure and features of transport demand, how far have the Community transport systems been able to meet transport needs, both quantitatively and qualitatively?

21. Transport users' requirements can be defined as both the demand and the need, expressed by an individual and by a group of individuals i.e. the Community. The individual expresses his demand for a transport facility and where this is not satisfied by the normal market mechanisms, then a need arises. Where transporters operating in their own interests meet the demand under normal market conditions, then this service is a commercial one. Where the supply of commercial services is limited, then the unfulfilled demand generates a requirement for an additional form of service. This demand can be defined as the "need" or "social demand".

A commercial service is one in which all the costs incurred are directly covered by the price paid by the user. A need or social service is one where the price of transport is distributed between both the consumer and the public authorities.

There are two types of services in the need sector or the social sector: those which are inherently profitable and those which are unprofitable because charges are kept low for political or social reasons.

A further dimension is introduced if we distinguish between individual costs and collective costs. This distinction is most important at the level of investment decisions. The public authorities must take account not only of the internal costs but also the external costs. It should be noted here that the technique of cost-benefit analysis has helped to clarify these problems.

Generally speaking, the concept of "need sector" includes the collective requirements which must be met but for which there is no market (for example, defence and public order). It also includes other requirements which are sold but in the sale of which competition is impossible (such as electricity). It also includes the "public utility" aspect of transport. Transport as a whole, however, is not a public utility, but it is important to recognise that some features of the transport requirements of the Community have the characteristics of a public utility. Where catering for the public utility element in transport gives rise to losses, a need sector arises.

It is difficult to quantify the "need" sector: to some extent it must be a qualitative judgment of the public authorities to decide whether and to what extent a need sector exists.

Generally speaking and for practical purposes, the demand for freight transport can be treated as a commercial demand. In certain cases, of course, the supply of transport services on a commercial basis would not be regarded as in the general interest and it is for this reason that Article 80 of the EEC Treaty and Article 70 of the ECSC Treaty provide for such social freight transport services.

1.2.1. The quantitative satisfaction of transport needs on commercial markets

22. As regards road transport, it can be considered that in general (except for certain specified connections) transport capacity has been able to meet the demand. The analysis of trends in total goods traffic (table in Annex II, doc. VII/137/75) shows that the growth in road transport has been by far the greatest (up by 63 % between 1962 and 1973, for a total increase in all surface transport of 44 %). (*)

23. The question arises, however, whether the quantitative restrictions imposed by certain Member States both at national and international level may have prevented an even greater increase in road transport services. There are grounds for thinking that such restrictions on transport for hire or reward are in no small way responsible for the greater use of own account transport and therefore the development of a form of transport which is often preferred to other means of transport. Furthermore, even though economic

(*) The UIC group considers that the available statistics are inadequate in themselves to allow indisputable conclusions to be drawn. This is particularly because the statistics are of a very global nature whereas in practice it is possible to discern a very large number of sub-markets where the relation between offer and demand can be very different.

forces are stronger than the restrictions imposed by the authorities, the market nevertheless suffers during the readjustment period, particularly owing to the delays inherent in administrative operations. Meanwhile, as the market has continued to develop new measures designed to meet an earlier situation are immediately out of date. To this must be added the fact that the undertaking, prevented from adapting spontaneously, cannot conduct a rational medium-term operations policy and is obliged to react disjointedly to administrative manipulations rather than on the basis of considerations founded in modern economic realities.

24. From what has been said above (*) one can conclude that intervention by the authorities has not thwarted the natural development of road transport; this is confirmed in a comparative study of traffic development in the markets subjected to quantitative restrictions and in traffic networks, which are completely unrestricted. It must be admitted, however, that in certain cases the quota system, when applied very stringently, has led to under-capacity, which in turn has distorted conditions of competition (examined in detail later in this report).

(*) The UIC group considers that the above-mentioned examination largely relates to the interests of the Community and of users and insufficient account has been taken of the interests of transport organizations.

25. In general, the waterway transport sector is not affected by quantitative restrictions and all transport needs have been met.

However, there is a degree of qualitative and even quantitative maladjustment, and the States have had to intervene to remove the oldest vessels from use by means of breaking-up operations partially financed by the public authorities.

Furthermore, and this is owing mainly to the fact that inland waterway traffic depends on natural circumstances, which means that reserve capacity must be available, temporary over-capacity occurs periodically. In order to meet these situations, a system of temporary laying-up on a voluntary basis, applicable to the main waterways in the Community, is now being planned.

26. As regards transport by rail, existing capacity can be regarded as sufficient to meet demand in normal periods. It should be noted however that:

- (i) investment decisions in plant and equipment are not entirely at the discretion of the railway undertakings, but are generally based on decisions by the governing authorities taken under annual budget procedures which must allow for political requirements;
- (ii) as passenger and goods services are operated together, goods services are sometimes affected by the requirements of the passenger services, and even on certain networks have to take second place to them during rush periods;

(III) the railway infrastructures, whose development is not controlled by the networks, govern to a large extent the possibilities of continuously adjusting transport supply to demand. Some lines are already saturated. Difficulties thus occurred in the first months of the energy crisis when there was a substantial increase in demand for rail transport. This situation also affects the quality of the service offered to customers, particularly as regards delivery dates.

1.2.2. Quantitative satisfaction of transport needs on the commercial market

27. To gain an idea, if only approximate, of the extent to which the transport system has been able to meet transport needs at Community level, the analysis must go beyond the purely quantitative aspects and cover the ability of the various means of transport to meet the diverse needs of a highly industrialized economy.

28. Road transport by reason of its flexible structure, has been able to adapt to a large extent to these requirements despite quantitative restrictions. This adaptation has occurred on several levels:

- (i) specialization of transport equipment. The range of commercial vehicles now available on the market means that carriers can use the type of equipment suitable for the needs of the customers as regards both useful load and facilities;
- (ii) quality of service. The remarkable progress in the car industry and the benefits deriving from the improvement in infrastructures - particularly the construction of motorways - have enabled the road transport carriers to improve their door-to-door services by reducing the delivery times;

(iii) flexibility in management. The structure of the industry (many small undertakings) spread throughout the country has meant that carriers have been able to eliminate or substantially reduce the waiting periods between the demand for service by the customer and the availability of transport.

29. Waterway transport has also been able to adapt progressively to changes in the demand for transport.

Inland waterway fleets and equipment have developed considerably with the introduction of new techniques (such as push convoys, possibility of continuous navigation thanks to radar, increase in deadweight) and specialization of vessels.

A considerable effort has been made, with some financial assistance from States, to replace obsolete equipment.

Finally, major construction works have been carried out on the main European waterways (such as canalization, modernization of locks, and other engineering installations, etc.), and this has enabled the internal waterway networks to improve profitability and production efficiency.

30. The railways, despite the budgetary restrictions referred to above, have made remarkable efforts to improve the quality of services offered to customers and substantial progress has been achieved.

However, the railways, which produce multi-purpose services, have not always exploited the technical and economic advantages which rail operations offer compared with other means of transport: (lower relative energy consumption compared with road transport, safety, less dependence on weather conditions and greater freedom from traffic congestion, very large unit loads and convoy loads, greater possibilities for automation and so on). They do not always have a sufficient degree of independence to enable them to better adapt rapidly to the new market requirements by developing the specialized transport services which the railways can offer more efficiently than any other means (such as transport by whole trains, long distance transport, transport by sections of trains, large containers, connection-to-connection transport and so on). (*)

2. Competitive situation of the market

2.1. General remarks

31. In the light of the factors described in the first section as regards the extent to which the transport systems have been able to meet requirements, the question arises as to the effects of this situation on transport rates and how far the freight transport markets have been affected by the occurrence of dominant positions or "cutthroat" competition.

The very mixed nature of the market and the lack of consistent and systematic information mean that it is impossible to assess the situation with any great degree of accuracy.

(*) The Bundesverband Spedition und Lagerei considers that the bad situation in which the railways find themselves is not exclusively due to their lack of independence.

2.2. Abuses of dominant positions

32. Generally speaking, the fact that road and waterway transport operations are carried out by a large number of operators is enough to reduce any risk of abuse of a dominant position in these modes of transport.

Competition within each of these sectors is very lively and this strongly reduces the possibility of a monopoly or oligopoly on the market.

This situation is confirmed by the fact that the application of Regulation No. 1017/68 applying rules of competition to transport by rail, road and inland waterway has not yet given rise to any intervention by the Commission for the penalizing of abuses in this area.

33. Theoretically, the problem could arise of whether the presence on the market of national rail undertakings might harbour the risk of an oligopolistic formation of rates on the market. The Commission's services consider that in general the answer to this question is in the negative, since the share of the railways in the freight transport market, both national and international, has fallen (on certain markets it is even in the minority). If allowance is made for the substantial shifts between types of transport service (especially from the railways to road transport), it should be assumed - and experience in fact has shown - that in practical terms the risk of abuse of dominant positions is strongly reduced; on the other hand, in some specific transport markets (needing, for example, special equipment) or vis-à-vis some customers, the railways can find themselves in a dominant position, at least for some time, and especially as a result of the application of special tariffs.

2.3. "Cutthroat" competition

34. The risk of "cutthroat" competition has often been referred to, both at national and at Community level, to justify certain interventions by the public authorities to restrict the freedom of decision of the undertakings as regards both investment in plant and equipment and rates.

This report does not attempt to discuss the theoretical basis of this view, but seeks merely to establish whether and how far such situations could arise.

35. As regards road transport, it is difficult to give an accurate answer to this question.

Opinions are divided as to the national transport markets; the view of the railway undertakings shared to some extent by the road carriers, is that the market is in a situation of permanent surplus of supply, which leads to cutthroat competition; but the users are not of this opinion.

As regards international transport operations between Member States, the application of Regulation No 1174/68 leads to certain conclusions. Observations over the last few years show that generally transport rates remain within the brackets of 23 % without falling to the lower limit. Special contracts concluded at lower rates generally reflect lower costs resulting from a better organisation of transport. This experience would tend to exclude any trend towards "cutthroat" competition in road transport.

36. The Commission's services do not believe that this type of competition is likely to be a serious problem or occur persistently, as the very structure of the profession would prevent it. It would be difficult for a small road transport undertaking to adopt for very long a pricing policy which did not cover costs without automatically going out of business. (*)

Could these differences of opinion perhaps arise from the different interpretations given to the term "cutthroat" competition? If this term is taken to mean the situation in which inequalities of treatment between the undertakings concerned are reflected in costs and therefore pricing policy, the problem must be seen in a different light - that of distortions to competition, which will be referred to later in this paper.

2.4. The effects of the competition situation on transport rates

37. A comparison of consumer price trends with the trend for average product per ton/kilometre for rail transport in full wagons (the only complete data available to the Commission's services (see Annex II, table 6, doc. VII/137/75) shows that in all countries for which complete figures are available consumer prices have risen faster - though not all at the same rate as the transport rates. The inference is that competition on the various transport markets has helped to prevent an increase similar to that in the cost of living over the last ten years, a situation which has been of advantage to users. (**)

(*) The UIC group and FICT (International Confederation of Transport Executive Staffs) express the view that this is not a convincing argument.

(**) The UIC group notes, in this context, the nearly general deterioration in the financial results of the railways; in addition, during the recent period of increased inflation, all the transporters have been confronted with considerable increases in cost which, in view of the competitive situation, have not always found sufficient compensation in their tariffs.

38. The more homogenous nature of inland waterway operations (or at least of a large part) makes for a more accurate assessment of effects of the competition situation on this market.

The over-capacity which occurs in this sector brings about sudden falls in transport rates which are very harmful economically to the undertakings concerned. This situation should be remedied, however, by the laying-up measures now being planned.

39. As regards the railways, rates often play the role of guide rates. However, the rates are influenced by the rates for road and water way transport, which are often in quite open competition with them, with the result that the competitive tariffs or rates on the railways apply to an evergrowing volume of traffic and thereby reduce the revenue expected when normal rates are fixed.

2.5. Distortions in competition

40. The fact that the Community freight transport market is sufficiently competitive does not mean that there are no distortions to competition. So far it has not been possible to organize, on a satisfactory footing, competition in the surface transport of goods in the Member States. This situation obviously extends to the Community level and is one of the fundamental obstacles standing in the way of the development of the common transport policy.

The causes of these distortions to competition are to be found both inside and outside the organization of the market. The most important are the following: (*)

- (i) the still unresolved question of relations between the railways and the States (1);
- (ii) the question, still outstanding, of the charging of infrastructure costs,
- (iii) disparities and differences in standards which at Community level and in each Member State govern transport capacity and rates.

These problems should be considered separately.

41. As regards the railways, there is no doubt that the particular status of these transport undertakings is one of elements which have so far prevented a final clarification of the situation.

The maintenance of the public service nature of the railways has led the public authorities to intervene in the setting of the general level of rates, with the result that traffic revenue does not necessarily cover total costs. The resulting low revenues, and the fact that at present the railway accounting systems do not make a clear distinction between revenue and costs for the goods sector as compared with the passenger sector, can only strengthen the assumption that certain railway rates are based on political grounds.

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- (*) The UIC and the unions propose that in addition the following should be mentioned:
- the inequality in the working conditions in the various modes of transport and the lack of respect for rules in this area as well as in the area of safety;
 - the insufficiency of railway investments.

- (1) Council decision EEC no. 1473/75 on putting the railway undertakings on a sounder footing and harmonizing the rules governing financial relations between these undertakings and the States; this decision (not yet published) suggests a solution to this problem. (OJ of the EC no L 152)

It is obvious that so long as a large part of the market is covered by "political" rates, of which it is by no means certain that they cover the corresponding costs, the possibility of arriving at an organization of the market based on the market economy is bound to remain open to question (1).

This is a question of fundamental importance for further studies.

42. As regards the charging of infrastructure costs, the railways are the only transport undertakings which bear the entire financial responsibility for the costs of managing and maintaining their infrastructure.

The difficulties, however, are surely not insuperable. An interim solution would be to make the disadvantages arising from this situation for the railways eligible for compensation, which could be authorized under Regulation (EEC) No 1107/70.

43. There remains the problem of distortions arising from regulations governing transport capacity and rates.

The divergent and disparate measures which now characterize the Community transport markets are a source of distortions of every type, as the Commission's consultations have revealed. Whatever the system to be adopted at Community level, it must be a harmonized one. Failing this, the very foundations of the common transport policy as laid down in Articles 74 and 75 of the Treaty are called in question and stripped of all meaning.

(1) It should be noted that, in the decision referred to in footnote (1) to point 40, the Council retained the possibility for Member States to intervene in the setting of the rate levels for railways.

3. Community integration of the transport sector

44. The integration of the transport sector, that is, the free movement of transport services within the Community, must contribute to the achievement of the common market in general; it therefore constitutes one of the general objectives of the common transport policy and should have been brought about through the establishment of the following:

- (i) the common rules referred to in Article 75 (1) (a),
- (ii) the conditions of access for non-resident carriers to national transport operations in a Member State (Article 75 (1) (b)),
- (iii) the conditions to enable carriers to gain permanent access to all transport activities in the territory of a Member State (the right of establishment, Articles 52 et seq.).

How far have these objectives been achieved?

3.1. The common rules referred to in Article 75 (1) (a) of the Treaty

45. In road transport, the measures which have enabled certain progress to be achieved towards the free movement of services are, in particular, the first directive of 1962 (1) as amended in 1974 (2), the directive on combined transport (3) and the Community quota (4).

(1) O.J. No 70, 6 August 1962, page 2005

(2) O.J. No 84/3 of 28 March 1974.

(3) not yet published

(4) O.J. No 349, 28 December 1974, page 5

It must however be admitted that the directives of 1962 and 1974 relate only to certain traffic; and that the Community quota affects only a very small percentage of all trade between Member States and is at present due to remain in force only until 31 December 1975.

The greater part of goods transport by road between Member States therefore remains subject to the provisions - sometimes divergent and contradictory (especially for transport on own account and transit operations) - laid down in the bilateral agreements, which perpetuate a system based on traffic operations reserved for the nationals of the Contracting States. The quotas stipulated in these agreements not only run counter to any process of integration but also seem to be contrary to the compulsory provisions of Article 7 of the Treaty, which prohibits any discrimination based on nationality. Furthermore, these quotas are distributed among the Contracting States on a basis which does not sufficiently reflect the real requirements of the market.

46. The situation is more satisfactory as regards inland waterway traffic, where there is practically no hindrance to the free international movement of services. However, this favourable trend cannot be attributed to action by the Community: it is due to international conditions which for a long time past have encouraged this development in traffic on the most important navigable waterways in western Europe.

47. The railway networks have also increased co-operation at international level.

So far, Community legislation has not been of overriding importance as regards the Community-level integration of this sector of activities. However, the Council recently adopted certain guidelines of principle regarding co-operation between railway undertakings and their Community-wide integration (1).

48. In conclusion, it should be noted that, since the entry into force of the Treaty, the common transport policy has only marginally encouraged the transport market towards the free movement of transport services.

3.2. Access to national transport operations by non-resident carriers
(Article 75, 1 (b) of the Treaty)

49. No provision has been adopted in this matter at Community level, and in fact the situation has not changed since the establishment of the Community.

National markets for the carriage of goods by road remain compartmented and non-resident carriers have not acquired any freedom of access to national transport operations.

(1) See Article 11 of the Council decision referred to in footnote 1 to point 40.

On the other hand, in inland waterway traffic the supply of services is largely realised thanks to the very open conception which has always characterized this sector.

The problem does not arise in rail transport owing to the particular features of railway operations.

Community legislation, then, has had no impact regarding the access of non-resident carriers to national transport operations and the terms of Article 75.1 (b) of the Treaty, which ought to have been applied before the end of the transitional period, have remained a dead letter.

3.3. Implementation of the right of establishment (Article 52 et seq. of the Treaty)

50. The work at Community level (started somewhat later than the date laid down by the general programme (1)), which was intended to implement the right of establishment in transport operations was not completed with success owing to developments in the situation.

In view of the decision handed down by the Court of Justice in Case 2/74 (2), the provisions of the Treaty relating to the right of establishment are henceforth directly applicable and all restrictions contained in national legislation to the freedom of establishment of nationals of one Member State in another Member State must be considered as annulled (*).

(1) O.J. No 2, 15 January 1962

(2) O.J. No C 114, 27 September 1974, page 26

(*) The Bundesverband Spedition und Lagerei notes that there are hindrances to the exercise of the profession of customs agent in Italy, France and in the Benelux countries.

4. The common organization of the transport markets in the context of work towards the general policy objectives

4.1. General Remarks

51. The highly industrialized nature of our economies is one of the constituent factors which has certainly influenced trends in the demand for transport; but this fact should not eclipse -- though this is on quite a different level -- the indirect influence on the demand for transport of conceptions which are apparent at national and at Community level: the desire to correct by means of State intervention the harmful effects for society which may arise from the implementation of policies based solely on the law of the market, that is, of industrial profits.

Regional policy, whose aim is to correct economic disequilibria between the regions of the Community, is an embodiment of such a conception, which embodies a "positive action" approach by the public authorities. The same applies to environmental and land use policies.

52. In its communication of October 1973, the Commission highlighted the role which the common transport policy could play in achieving the objectives laid down by these policies.

Here, it must be admitted that the impact of transport in the achievement of these policies will be primarily confined to transport infrastructures. The fact remains that the provisions governing the operation of the transport markets (capacity, transport rates and conditions, competition) can also have some effect in the same direction (*).

(*) The UIC group notes that other interventions are possible in order to direct some traffics towards the modes of transport which are better adapted to the objectives aimed at.

This applies particularly as regards:

- (i) services set up to meet requirements in the public interest, which may be included in the category of public services;
- (ii) tariff measures, particularly the support measures referred to in Article 80 of the EEC Treaty and Article 70 of the ECSC Treaty, applied to give temporary assistance to regions or undertakings in difficulty.

53. It should be recalled here that the establishment of services whose purpose is to meet public interest implies that the undertakings responsible must fulfil certain obligations known as "public service obligations", that is the obligation to operate the services, the obligation to provide transport facilities and tariff obligations.

On 26 June 1969, in order to regulate the question at Community level, the Council adopted Regulation No 1191/69 which inter alia enshrines for the three modes of transport:

- the principle of the elimination of the obligations inherent in the concept of public service,
- the maintenance or imposition of such obligations insofar as they are required to ensure the adequate provision of transport services.

It is worth knowing how much advantage is taken of the possibilities opened by national and Community provisions to achieve social and economic objectives through the establishment of public services.

4.2. Obligations to operate services and to provide transport facilities

54. In almost all the Member States, rail services, both passenger and goods, are required to comply with obligations to operate services and to provide transport facilities. The other modes of transport, except for the regular carriage of passengers by road, are not subject to such obligations.

55. The maintenance of the obligation to operate services means, among other things, that certain low-traffic connections must continue to be operated; their deficits are covered from financial compensation by the State, in accordance with Community regulations. It is well known that this situation arises from reasons which in principle fall outside the transport sector; it is not entirely out of the question that transport operations carried out at the free initiative of the undertakings might in certain cases be able to meet these transport needs without being a charge on public funds.

56. The obligation to provide transport facilities is a general obligation which is imposed mainly on the railways and which, together with tariff obligations, may mean economic disadvantages for the undertakings concerned.

In an increasingly competitive market where there is a wide range of types of transport, the question of whether this obligation should be maintained ought to be examined.

4.3. Tariff obligations

57. For reasons of general economic policy, governments usually have a hand in setting the general level of the transport rates applied by their railway undertakings. For the other modes of transport this intervention is restricted to the sector subject to compulsory rates.

These interventions, particularly refusals to authorize general increases in rates, result for the enterprises concerned in losses of revenue which are not automatically eligible for compensation and thus undermine the profitability of these undertakings.

Furthermore, in certain countries, changes in rates to adapt to market conditions are also subject to prior authorization, which in a competitive market constitutes a serious commercial disadvantage for the enterprises subject to the interventions. Generally speaking, this is the case for the railway undertakings.

Interventions of this nature ought to be restricted to the cases referred to in Article 30 of EEC Treaty and Article 70 of ECSC Treaty (1).

(1) See footnote 1 to point 41.

5. The effectiveness and suitability of State intervention
in the common organization of the transport markets

53. In the light of what has been stated above, the value and effectiveness of the national and Community rules governing capacities and prices relating to the transport of goods within a commercial market should be discussed.

5.1. The various types of rules governing capacity

59. The placing of quantitative restrictions on capacity is designed to limit competition between means of transport and undertakings engaged in the operation of the same means of transport. The introduction of such restrictions is in fact an effort to influence the level of transport prices indirectly in order to bring them to a level which is considered adequate. The following instruments are generally used:

- transport authorization quotas,
- the examination of the individual requirements of transport undertakings.

The first method is used in most cases, while the second has so far been applied only in the Netherlands.

5.1.1. Transport authorization quotas

60. The quota system generally applied involves the laying down of quotas in advance, and it is by its very nature relatively rigid. Consequently, and in the light of the experience gained in this field, a quota system applied on a permanent basis could not ensure a sufficiently flexible and rapid quantitative adaptation of supply to demand. Particular mention must be made of the fact that the quotas are as a general rule determined without reference to forecasts of requirements and for a period fixed in advance, which means that they are unable to cope with the often very considerable fluctuations on the markets concerned; because of its arbitrary

nature, the use of the quota system is liable to result in an excessive limitation of capacity and an unjustified increase in transport prices.

If, on the other hand, the quotas laid down are such that they in no way restrict the utilization of existing capacities, the system can be regarded as completely useless and gives rise only to bureaucratic formalities and unjustifiable expenditure.

To sum up, there is a risk that the currently applicable quota system is likely either to lead to arbitrary results or to be completely ineffective. (*)

61. Finally, it must not be forgotten that the transport of goods by road is designed to fulfil special requirements (door-to-door transport without the need for trans-shipment, flexibility of the undertaking, specialization, accompaniment of the goods, etc...) which, especially in the case of certain categories of transport, are now considered to be essential conditions.

If a quota system involves actual restrictions on the fulfilment of users' transport requirements, this results, in the long term, in a shift towards own-account transport which is subject to practically no restrictions.

(*) The UIC group, while recognising that the quota system can favour national interests, is in favour of its continuance in any future market organization:

- in diminishing its rigidity by limiting the length of validity of the authorisations,
- in taking into consideration the very important element of elasticity, which is to be found in the more or less intense use of the authorisations for a certain capacity in tons, depending upon the market situation,
- in establishing forecasts and in lining up the quotas with the pattern of traffic development.

Finally, as a general rule, the quota system will not lead to an unjustified increase in transport costs.

The Bundesverband Spedition und Lagerei quotes a German example to show how a quota system can be applied flexibly and without ill effects.

5.1.2. The examination of individual requirements

62. The Netherlands controls capacity by examining individual transport requirements. Under this system any transport undertaking wishing to obtain a transport authorization must provide proof (by producing the contracts) of the transport requirements which it must fulfil.

Under this system renewal of an authorization is subject to the provision of proof that the transport operator has effected a volume of transport operations proportional to the authorized capacity and with a sufficient profit margin.

Furthermore, the competent authorities may suspend the issue of authorizations if the market situation so requires.

5.2. The various systems of charging

63. The systems of charging currently applied may be divided into two main categories:

- compulsory tariffs, involving fixed prices, either maximum or minimum, or bracket tariffs, differing mainly according to the type of product and the tonnage; transport operators and users must apply these tariffs and any prices not based on these tariffs must be examined by the authorities before or after their application;

- reference tariffs, involving prices or scales which the transport operator and the user are free not to apply if they do not wish to do so, in which case no explanation is required by the authorities.

In the first case the application of tariffs is the general rule, while the application of individual prices is the exception.

In the second case, the situation is generally reversed.

At present, all tariffs, which, furthermore, have been ratified - and sometimes even laid down - by the authorities, are based on the average cost of transport, and correspond to the actual costs incurred by individual undertakings only to the extent that the differences between the tariffs are presented with a very detailed breakdown.

5.3. The effects of tariffs on the prices applied

64. Where the compulsory application of tariffs is actually monitored and authorized, and where prices deviating from the tariffs are the exception, the tariffs constitute a form of protection and guarantee the revenue of transport operators. Price competition is possible only within the limits provided for by the tariffs.

This method of organizing the market by coordinating tariffs implies the application of tariff systems with equivalent effect by all transport operators irrespective of the means of transport involved.

65. At present compulsory tariff systems, reference tariffs and systems involving the free formation of prices coexist.

Furthermore, the extent to which some compulsory systems of charging are applied varies in practice.

66. Under these conditions, with the exception of the compulsory tariff system of the railways, it is therefore difficult to consider a system of charging, even one involving compulsory tariffs, capable of serving as more than a guideline for determining individual prices; at the most it may be regarded as having a psychological effect. In fact, if the market situation resulting both from the supply/demand relationship on the transport market and from the trend of costs is no longer reflected in the tariffs applied, transactions between contracting parties will inevitably adapt themselves to the actual economic situation.

It is particularly easy in the case of a downward tendency in relation to floor prices not to comply with the regulations laid down, if a mutual agreement is reached by the contracting parties, who may employ numerous means (refunds, fictitious prices on the transport document, discounts for regular customers, etc...) which make it easy to avoid compliance with regulations.

In the case of an upward tendency in relation to the maximum prices, transport operators may avoid the application of compulsory tariffs by selecting those offers which enable them to obtain the greatest profit.

The relative ineffectiveness of fixed tariffs has been confirmed by the application of Regulation (EEC) No 1174/68, the main features of which are contained in the various reports drawn up by the Committee of Experts set up by that Regulation (*).

(*) The Bundesverband Spedition und Lagerei questions this conclusion and claims that it is the inadequacy of both checks and sanctions in some countries that is the basis of the failure of this experiment.

The Committee has noted in particular that in the case of certain transport routes between the Member States the bracket spread, fixed at 23 %, has widened considerably as a result of the changes in the parities of the currencies of the Member States concerned. However, this considerable widening of the bracket has not affected the average level of prices applied, these having remained relatively stable.

5.4. The effects of rules governing capacity on the economic viability of the means of transport

67. The services of the Commission do not have sufficient information to enable them to assess the effect, in either general terms or on individual sectors, of the regulations governing the organization of the transport market on the economic viability of means of transport and to outline the trends over the past years.

Nevertheless, mention should be made of certain factors which have a negative effect on the economic viability.

68. The road transport sector is, especially at international level, governed by regulations which restrict capacity and thus reduce its economic viability. For example, under bilateral agreements, transport operators making the outward journey laden may not make the return journey laden unless the consignment is intended for the country of origin of the vehicle. The carriage of goods intended for another Member State (as in the case of the Community quota) is prohibited. The same applies to the execution of transport operations on the territory of the country to which the outward journey is being effected.

Furthermore, bilateral quotas are normally determined on the basis of the principle of reciprocity (*). Thus the capacities of the two contrac

(*) The Bundesverband Spedition und Lagerei is in favour of maintaining this principle as long as no harmonization of business costs (taxes, fuel and vehicles, social regulations, weights and dimensions, etc...) has been agreed at community level.

parties engaged in the transport operations are the same even if the volume of goods being transported in each direction differs. Such a situation can only prevent the optimal utilization of the means of transport. It should also be noted that transport authorizations are issued according to rules which place an additional restriction on economic viability. This category of rules includes provisions prohibiting the interchangeability of semi-trailers between transport operators, (for example, to enable a relay system to be implemented) and not allowing authorizations to be used on the basis of total tonnage (which means, for example, that an authorization for the transport of forty tonnes may be used either for a vehicle with that capacity or for two twenty-tonne vehicle.

Finally, several Member States do not operate a system of hiring vehicles which would make it possible to cope with peak demand and enable reserve capacities to be built up to deal with seasonal fluctuations in demand.

69. In the field of inland waterway transport in which, as indicated above, the principle of freedom to provide services has already been adopted to a large extent, and where there is no system of authorizations restricting capacities, the situation is better.

The principal factors having a negative effect on the economic viability of the means of transport are climatic factors which limit the draught of ships and necessitate the creation of a reserve of hold capacity.

The system of temporary immobilization of vessels should help to reduce these disadvantages.

70. As far as rail transport is concerned, where the only rules governing capacity are the restrictions resulting from the amount of budgetary appropriations allocated, the problem dealt with here does not arise.

5.5. Adaptation to the requirements of the market in time and space

71. The rules governing prices and conditions of transport, in the form in which they are applied today, in general constitute rigid instruments which prevent tariff measures from being adapted to the changes which occur for each transport market in the course of time (on account of seasonal and cyclical fluctuations in demand) or to the various requirements of a transport market of continental size, such as the Community market.

72. Measures designed to regulate transport capacities and prices normally take the form of legislative provisions or regulations which require long periods (*) for preparation and adoption and are therefore likely to produce their effects when the situation on the market may have changed completely; this also prevents the necessary measures to deal with serious and sudden disturbances on the market from being adopted in good time.

73. Furthermore, such provisions are applied on a general basis: consequently they do not allow for different situations, which could arise in certain sections of the transport markets, particularly on the geographical markets. Thus the measures adopted are liable to prove useless in certain regions and even to be contrary to the actual requirements of some sections of markets.

Finally, the way in which these different instruments are used is such that it is not possible to spread their application or effects over a period of time carefully using them simultaneously or at intervals.

(*) The Bundesverband Speidition und Lagerei quotes the German example where the procedures are prompt (8 weeks for a tariff).

VII/136/75 E

DESCRIPTION OF THE LEGAL AND REGULATORY SITUATION IN THE VARIOUS
MEMBER STATES AND AT COMMUNITY LEVEL

I. RAILWAYS

1. In every Member State a company operating on a national basis is responsible for the carriage of passengers and goods.

The setting up of these companies was only made possible as a result of intervention by the public authorities which had to make it legally possible for the railway companies to develop the infrastructure required for such transport. Special laws have been introduced in all the Member States in order to prevent abuse of a dominant position as a result of the monopoly held by the railway companies. As a result of the growing competition resulting from the development of road haulage, the special rules applicable to the railways have had to be relaxed.

In certain Member States there are, in addition to the national companies, railway companies which operate on secondary routes and which are, in many cases, operated by the regional authorities.

§1. Access to the market

2. Theoretically, the railway companies are not restricted as regards carrying capacity, whether national or international carriage is involved. Increases in rolling stock are limited only by the financial means granted to the railway companies by the public authorities.

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Tariffs and terms of carriage

At national level

3. In some Member States the railway companies are given almost complete freedom when fixing their prices, whereas in other Member States they are bound by a strict system of tariffs and, in most cases, the obligation to effect transport operations.

The British and Irish railway companies fix their tariffs freely. The tariffs, which are dependent on the market situation, are neither published nor communicated to any authority, except in the case of the carriage of ECSC products. They are however subject to the obligation to run the service and to effect transport operations.

The Netherlands railway companies, while subject to a system of tariffs (very simple tariff system involving maximum prices authorized by the Government), effect most of their transport operations on the basis of individual contracts based on lower tariffs. Such contracts are published only if ECSC products are being transported.

The other Member States on the Continent used to have a system of compulsory, fixed ad valorem tariffs applicable under normal circumstances, and a system of special published tariffs. All such tariffs had to be approved by the supervisory authorities before their application. In certain States the railway companies could, under certain circumstances and subject to prior approval, conclude individual contracts not based on the published tariffs.

To ensure respect of the principle of non-discrimination, the railway companies had to allow comparable tariffs and terms to users who were operating under comparable conditions.

Nowadays such a rigid system applies only in Italy. The tariff system applied by the FS involves a general tariff, special fixed tariffs and individual contracts concluded, in particular circumstances, by the FS in their own interest.

The strongest tendency towards greater liberalization in rail transport has been recorded in France. The SNCF has gradually been freed from its principal tariff restrictions. In general the SNCF applies a system of so-called reference tariffs, which do not require prior approval, comprising either a fixed tariff or a maximum and minimum tariff, the difference between which must not exceed that applicable in the case of the competitive means of transport; within that bracket the SNCF may fix an applicable tariff. It may also conclude individual contracts based on tariffs falling either within or outside the tariff bracket.

In Germany the DB applies either fixed or bracket tariffs. The DB resorts only rarely to the latter type; on the rare occasions when it does apply such bracket rates, the bracket may have a width of 23%. All rates are subject to government authorization and are published. Nevertheless, the DB is authorized, within the framework of its business management, to adapt its tariffs annually to the situation on the market, but by no more than 20%. Furthermore, for the routes leading to and from the German seaports, the DB is, under certain circumstances, authorized to fix its tariffs freely, by concluding individual contracts, not based on the published tariffs. The tariffs applied on the basis of such contracts are not published unless they are to be applied to the carriage of ECSC products.

In Belgium the SNCB must apply fixed tariffs which have been published and authorized beforehand by the supervisory authority, but it has been authorized to conclude individual contracts for the carriage of non-ECSC goods, at non-published rates, provided that such contracts improve the

company's financial position. Contracts concluded for a period of more than one year are subject to prior authorization by the Minister.

Special published tariffs may be applied to the carriage of ECSC products. They must be fixed for a minimum period of one year, and prior authorization by the Minister is required only if they are concluded for a period of more than eighteen months.

The Grand Duchy of Luxembourg applies a system of published tariffs. The laws in this connection provide that individual contracts may be concluded, but the Luxembourg Government still has to lay down the terms on which such contracts may be concluded and the rules governing the publication of the tariffs.

In Denmark the railway tariffs are generally fixed, approved and published. The Danish railways have only a limited number of special published tariffs. They may apply reductions of up to 50% of the published tariffs.

At international level

4. The tariffs and terms applicable to rail transport are determined at international level by the provisions of Article 9 of the "International Convention concerning the Carriage of Goods by Rail" (CIM) in the case of traffic between the countries which have signed the Convention. All the Member States have signed it.

Pursuant to those provisions, "the cost of transport and supplementary expenses are calculated on the basis of the tariffs legally in force and duly published in each State". The publication of international rates is compulsory only where the publication of national rates is compulsory. Individual contracts may be concluded, provided that comparable rates are applied to other users in comparable circumstances.

The publication of such contracts is not obligatory under the CIM. It is obligatory only in the case of contracts for the intra-Community carriage of ECSC products.

5. At Community level reference must be made to the Agreement of 21 March 1955 concluded by the Member States of the ECSC with a view to establishing through international railway tariffs for coal and steel traffic between Member States.

II. ROAD TRANSPORT

§1. Access to the market

6. As regards the conditions for the admission to the occupation of commercial road haulage operator, a distinction must be made between the subjective conditions, which relate to the transport operator himself, and the objective conditions, which relate to the organization of the transport market and the fulfilment of the transport requirements.

7. There are three types of subjective condition: the person must be of good repute, be of appropriate financial standing and satisfy the condition as to professional competence.

On 12 November 1974 the Council adopted a Directive on "admission to the occupation of road haulage operator in national and international transport operations"¹. This Directive introduces the principle that, with effect from 10 January 1978, admission to the occupation of road haulage operator is to be subject to the person concerned satisfying the condition as to professional competence, as well of being of good repute and of appropriate financial standing.

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1) O.J. n° L 308, 19 November 1974, p. 18

8. As regards supervising the capacity of road haulage undertakings in the Member States on the basis of objective criteria, very different rules exist depending on the views held by each Member State with regard to transport coordination.

The rules applied by the Member States generally differ depending on whether national or international transport is involved and, in the case of the former, a further distinction must be made between short- and long-distance transport.

National transport

9. As a general rule, no special rules govern access to the market in the case of short-distance national transport.

An authorization or licence is required by operators for long-distance road haulage.

- In Belgium such authorization are issued, with no quota restrictions, to undertakings which can prove that they carry out some short-distance road haulage operations.

-- In Germany, Denmark, France, Ireland and Italy there are quota restrictions on long-distance transport.

- In the Netherlands there are no quota restrictions on such transport, but a licence is required which is issued only after the individual requirements of the transport undertakings have been examined.

- In the Grand Duchy of Luxembourg national road haulage is subject neither to quota restrictions nor to any examination of the requirements of the markets.

-- In the United Kingdom admission to the occupation depends solely on the results of qualitative control carried out for the sake of road safety.

No restrictions are placed on private road haulage except in the Netherlands where such haulage must be registered. Registration may be refused if the applicant cannot prove that he plans to carry out such haulage only on a private basis or if it is necessary to refuse the application in the general interest.

International transport

10. In order to be able to carry out international road haulage operations, undertakings in almost every country must obtain prior authorization, but such authorization is generally issued without difficulty to holders of a national haulage authorization.

Furthermore, bilateral agreements between Member States lay down annual quotas which may be transported between two countries by the operators from each country. The Commission does not intervene in the conclusion of such agreements.

Efforts to achieve a common organization of the markets in road haulage between Member States led to the adoption by the Council on 19 July 1968 of a Regulation introducing a Community quota of 1 200 authorizations and laying down the number of authorizations to be granted to each of the six original Member States of the Community. As that Regulation expired on 31 December 1972, the Council adopted a new Regulation on 28 December 1972 laying down a new Community quota for 1973 and 1974 and capable of being extended for one year. That Regulation also laid down the number of authorizations to be granted to the new Member States and raised the overall quota for 1973 to 1 584, and for 1974 to 1 792. On 19 December 1974 the Council extended the validity of that Regulation for one year, raising the Community quota to 2 363 authorizations.

In addition to the Community quotas, agreements certain Member States lay down bilateral quotas¹. The number of such authorizations to be granted is determined by agreement between the States concerned.

¹ See table annexed hereto

Finally, within the framework of the ECMT, a system of multilateral quotas operates alongside the two other systems.

§2. Tariffs and conditions of transport

National transport

11. The tariffs applied by the various Member States in the road sector differ considerably.

- In Ireland, Denmark, the United Kingdom and the Grand Duchy of Luxembourg, road haulage tariffs are not subject to any restrictions laid down by regulation. The tariffs are arrived at by free discussion between the hauliers and the users.

Alongside these completely free systems, the other Member States implement tariff policies which involve differing degrees of intervention.

Germany and France have the most exhaustive sets of rules.

- In Germany a distinction must be made between short-distance haulage (Güternahverkehr) and long-distance haulage (Güterfernverkehr).

In the case of short-distance haulage, i.e. within a fifty kilometre radius of the place where the vehicle is registered, transport undertakings apply compulsory tariffs with a 40% bracket spread. There are also certain regional tariffs which contain either fixed rates or rates with a smaller bracket spread.

Long-distance transport is subject to compulsory tariffs with a 17% bracket spread. Until 1961 all the tariff rates were fixed.

As in the case of the DB, long-distance road haulage undertakings may conclude special contracts not based on the published tariffs when transporting goods to and from the German seaports. Such contracts must be published.

The French tariff system is applicable to the carriage of goods within France over distances of 150 km or more. The tariff rates applicable to haulage over shorter distances may be fixed freely. The tariff system consists of a compulsory tariff with a bracket spread of 23 %. The tariffs may be applied freely within a 14 % bracket spread ; where the bracket spread lies between 14 % and 23 %, the applicable tariff rates are subject to prior authorization by the CNR (Comité national routier) ; such tariffs must be published.

Special contracts may be concluded under certain circumstances, subject to the prior approval of the Minister of Transport and publication if the rates on which such contracts are based lie below the lower limit of the tariff bracket.

In Belgium road haulage tariffs are fixed freely except in the case of the carriage of ECSC products. Carriage of the latter is subject to a compulsory tariff with a bracket spread of 30 %, and those rates which are more than 5 % above the lower limit of the bracket in the case of coal, and more than 10 % above that limit in the case of steel, must be published.

The Netherlands has a system of tariffs based on maximum rates below which transport undertakings may fix their tariffs freely depending on the law of supply and demand provided that the rates actually applied are economically viable.

By a law of 6 June 1974 the Italian Government approved the introduction of a system of compulsory tariffs with a bracket spread of 23 %. Under that system contracts based on tariff rates outside the 23 % bracket are prohibited. The Italian Government still has to adopt the measures for the enforcement of that law.

International transport

12. As regards international transport within the Community, Regulation (EEC) No 1174/68 of 30 July 1968 introduces compulsory, direct tariffs with a bracket spread of 23% for the carriage of goods by road between Member States. These rules, introduced by way of experiment, do not prevent the conclusion of special contracts based on tariffs falling outside the limits of the brackets, provided that all of the following conditions are fulfilled:

- existence of circumstances not provided for in the tariffs, in particular competition from other means of transport or private road haulage,
- large quantity to be transported (500 tonnes in 3 months),
- guaranteed viability.

Such contracts must be published.

13. As regards international transport not carried out between Member States, mention should be made of the NIWO tariffs applicable in the Netherlands to transport to and from non-member countries. Those tariffs have a large bracket spread of 75% which is applicable only to the Netherlands transport undertakings.

Under the German laws on road haulage, tariff rules are applicable to the German section of the route irrespective of the nationality of the transport operator. Apart from the German tariff rates applicable to the German section of the route, a suitable rate must be fixed for the non-German section of the route.

III INLAND NAVIGATION

14. Not all the Member States transport goods by inland waterway; in those countries which do, the importance of this means of transport varies considerably.

.../...

It is very important in the Netherlands, Belgium and Germany. Although it is less important in France, it is nonetheless not negligible.

In two other Member States, Italy and the United Kingdom, the scale of inland waterway transport is minimal.

§1. Access to the market

15. An examination of the legal systems governing access to the river transport market in the seven Member States concerned reveals that they differ less than those governing road transport.

In certain countries, such as Belgium, Germany, the Grand Duchy of Luxembourg and the United Kingdom there are no barriers preventing access to the market.

In France vessels must be registered, which generally means that foreign vessels cannot use the French waterways. In fact, as a result of the conclusion of international agreements, vessels not registered in France may use the French waterways near the border or in order to reach a port where they have been offered an international load. In France, a new vessel cannot be brought into service unless an old vessel is taken out of service at the same time.

In Italy and the Netherlands a licence is required before goods can be transported by waterway.

In certain countries, e.g. Belgium private river transport is governed by very strict rules as regards authorizations to operate.

.../...

It should also be mentioned that in Belgium, France and the Netherlands river transport operators can carry out transport operations only after registering on a list (freighting rota). Under this system the user cannot select the transport operator freely and it is not possible to conclude transport contracts freely.

§2. Tariffs and terms of transport

16. In Italy and the United Kingdom river transport tariffs are fixed freely by transport undertakings and users. △

It is only since the canalization of the Moselle that Luxembourg has been affected by inland waterway transport, but no tariff regulations have been adopted in this sector as any river transport concerning Luxembourg is always international transport.

The other four Member States in which inland waterway transport plays an important part in the transport economy, have systems of tariffs which are fixed, published, supervised and approved by the State. In Belgium, France and the Netherlands such systems are applicable alongside the system of freighting rotas.

Tariffs are fixed (Germany), fixed within a bracket (Netherlands), within brackets (France) or have minimum rates (Belgium).

Exceptions may be granted subject to the approval of the freight committees.

In recent years the rules have tended to become more flexible, especially in the Netherlands and Germany.

A bill has been presented in the Netherlands in favour of the abolition of the system of freighting rotas; in Germany use was recently made of the possibility granted under the laws in force to fix freight rates within a bracket.

International freight rates are fixed freely. In certain countries freight rates for exports are posted in the freight offices.

As regards transport on the Rhine, mention must be made of the existence of pools and agreements concluded by the operators to deal with the latent crisis threatening this sector.

IV. ACHIEVEMENTS AT COMMUNITY LEVEL

§1. 1965 framework decision

17. During its session of 22 June 1965 the Council reached an agreement on the organization of the transport market.

Part of the agreement related to the tariff system to be introduced within the framework of the common transport policy. On 29 October 1965, after this agreement had been reached, the Commission presented the Council with a proposal for a general regulation, with amendments to an initial proposal, relating to the introduction of a system of bracket tariffs for the carriage of goods by road, railway and inland waterway.

The proposal provided for;

- the introduction of a system of reference tariffs, in addition to the compulsory tariff brackets, i.e. of a system of approved, published tariff brackets of an indicative, not compulsory nature;
- publication of the tariffs and terms of transport applied outside the compulsory tariff brackets and reference tariff brackets;
- the abandonment, in the case of special contracts based on tariffs outside the compulsory tariff brackets, of the principle of prior authorization, so that such contracts would, as a general rule, only require subsequent justification and publication;

.../...

- the setting up in the Commission of a committee to monitor the transport market;
- the introduction of a safeguard clause enabling the Member States to employ a Community procedure to remedy serious distortions which could give rise to the application of the new tariff system.

During an initial three-year period, the new tariff system would be applied only to traffic between the Member States. Compulsory tariffs would be applied to carriage by rail and road, and reference tariffs to transport by inland waterway.

After this initial stage, the system should be extended to national traffic and the system of reference tariffs should be applied to the transport by rail and road of certain bulk goods.

In order to give the system the greatest possible degree of economic compatibility, the Commission had considered it advisable to introduce additional provisions relating to certain points not dealt with explicitly by the Council. The Commission had therefore allowed the Member States to fix compulsory tariffs, on a temporary basis, with maximum or minimum rates for transport to which reference tariffs are applied, in order to prevent, where necessary, abuse of dominant positions or out-throat competition.

Apart from providing for the introduction of the tariff system, the agreement of 22 June 1965 also made provision for a number of other measures aimed at harmonizing the conditions for the operation of the markets and concerning, inter alia, admission to the profession, monitoring of carrying capacities, agreements, non-State intervention in competition, infrastructure and its costs, the financial equilibrium

.../...

of the railways, the standardization of their accounts and their relations with the State.

§2. 1966 Council Resolution

18. At its session of 19 and 20 October 1966 the Council adopted a Resolution in which it ceased to give priority to the tariff system, advocating the adoption of measures in all fields of the common transport policy with a view to achieving a balanced organization of the transport market. It recognized in particular the need to prevent abuse of dominant positions or cut-throat competition, and asked the Commission to present proposals regarding road and inland waterway carrying capacity and admission to the profession.

§3. 1967 framework decision

19. On the basis of a memo from the Commission and of another from the Italian Government, to which further points were added by the Commission, the Council decided, on 13 and 14 December 1967, to adopt the following Regulations concerning the transport market as soon as possible:

- the Regulation applying rules of competition to transport,
- the Regulation on the introduction of a system of bracket tariffs for the carriage of goods by road between Member States,
- the Regulation on the Community quota for the carriage of goods by road between Member States,
- in addition, in other fields connected with the operation of the market, the Regulation on action by Member States concerning the obligations inherent in the concept of a public service, and that on the normalization of the accounts of railway undertakings.

.../...

Those Regulations were adopted by the Council, practically by the deadlines laid down.

V. WORK OF THE OTHER INTERNATIONAL INSTITUTIONS

20. Several other international institutions, in particular the Central Commission for the Navigation of the Rhine (CCR), the European Conference of Ministers of Transport (ECMT) and the United Nations Organization (UNO) in Geneva - and especially its Inland Transport Committee - are interested in the economic aspects (and also in the other aspects) of transport. The ECMT recently introduced a limited quota of multilateral authorizations for the international commercial carriage of goods by road between the Member States of the ECMT. The ECMT is currently proposing, inter alia, action in the field of combined transport.

Nature des autorisations délivrées pour les transports routiers de marchandises effectués entre les Etats membres
 Art der für den Güterkraftverkehr zwischen den Mitgliedstaaten ausgestellten Genehmigungen
 Nature of licences issued for goods transport by and between Member States

Destination Bestimmungsort Départ Abgang Departure	Belgique Belgien Belgium			Danemark Dänemark Danmark			Allemagne Deutschland Germany				France Frankreich France				Irlande Irland Ireland			Italie Italien Italy			Luxembourg Luxemburg Luxembourg			Pays-Bas Niederlande Netherlands			Royaume-Uni Ver.Königreich United Kingdom			
	1	2	3	1	2	3	1	2	3	4	1	2	3	4	1	2	3	1	2	3	1	2	3	1	2	3	4			
Belgique Belgien Belgium	-	-	-	C : La: La: At At At ou et ou oder und oder or and or Av Av Av	C : L C2: Av Av	C: C1: C1 - Av Av Av At At At (2 contingents distincts 2 verschiedene Kontingente 2 separate quotes) Zc ZL und/ et/ and	pas d'accord keine Vereinbarung no agreement La: La: La: Av Av Av	C L C1	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L	L L L			
Danemark Dänemark Danmark	C: L C2 At Av ou/oder/or Av	-	-	-	C: L C2: At Av ou/oder/or Av	C: C2: C2: Av Av Av ou/oder/or At At At	Pas d'accord ^{*)} La: La: La: Av Av Av	C: C2: C1 Av Av Av	L L L	L L L	L L L	Renseignements non fournis keine Auskünfte no information provided																		
Allemagne Deutschland Germany	C: L La: Av Av	C: L C2: At Av ou/oder/or Av	-	-	-	C: L C2: C1: Av Av Av ou/oder/or At	pas d'accord ^{*)} La: La: La: Av Av Av	C: L C2: At Av	La L L	C: L C2: At Av	C: L C2: C1: Av Av Av																			
France Frankreich France	C: L La: Av Av	C:Av C2: C2: ou/ Av Av oder/or → At At At	C: L C2: C1: Av Av Av ou/oder/or At	-	-	-	-	Pas d'accord ^{*)} La: La: La: Av Av Av	C: C2: C1: Av Av Av (2 cont.distincts 2 verschied.Kont. 2 separate quotes) Zc et/und/and ZL)	L L L	L L L	C:Av C2: C2: Av Av																		
Irlande Irland Ireland	pas d'accord ^{*)} La: L La: Av Av	pas d'accord ^{*)} La: La: La: Av Av Av	pas d'accord ^{*)} La: La: La: Av Av Av	pas d'accord ^{*)} La: La: La: Av Av Av	pas d'accord ^{*)} La: La: La: Av Av Av	-	-	-	pas d'accord ^{*)} La: La: La: Av Av Av	L L L	L L L	L L L	Pas d'accord Keine Verein barung no agreement exists																	

Destination Bestimmungsort Départ Abgang Departure	Belgique Belgien Belgium	Danemark Dänemark Denmark	Allemagne Deutschland Germany	France Frankreich France	Irlande Irland Ireland	Italy Italien Italy	Luxembourg Luxemburg Luxembourg	Pays-Bas Niederlande Netherlands	Royaume-Uni Vereinigtes Königreich United Kingdom
	1 2 3	1 2 3	1 2 3 4	1 2 3 4	1 2 3	1 2 3 4	1 2 3	1 2 3	1 2 3 4
Italie Italien Italy	C: L La: At Av	C: C2: C1: Av Av Av	C: L C2: At Av	C: C2: C1: C1: Av Av Av Av (2 continents dist. 2 verschied.Konting. 2 separate quotes) Zc et/und/and Zl	pas d'accord *) La: La: La: Av Av Av	- - - -	L L L	L L L	C: C2: C2: C1: Av Av Av Av
Luxembourg Luxemburg	L L L	pas d'accord *) renseignements non fournis Keine Angaben no information provided	C: L C2: At At	C: C2: C2: Av Av Av (2 contingents dist. 2 verschied.Konting. 2 separate quotes) Zc et/und/and Zl	pas d'accord *) La: La: La: Av Av Av	pas d'accord *) La La La	- - -	L L L	L L L L
Pays-Bas Niederlande Netherlands	L L L	L L L	C: L C2: Av Av	C: C1: C2: At Av Av et/und/and Av	pas d'accord *) La: La: La: Av Av Av	L L L	L L L	- - -	L L L
Royaume-Uni Vereinigtes Königreich United Kingdom	L L L	L L L	C: L C2: C1: Av Av Av At At	C: C2: C2: Av Av Av At At At	pas d'accord *) La: La: La: Av Av Av	C: C2: C2: C1: Av Av Av Av	pas d'accord *) L L L	L L L	- - -

- 1 - compte d'autrui/gewerblicher Verkehr/transport for hire or reward
- 2 - compte propre/Werkverkehr/transport on own account
- 3 - transit/Transit/transit
- 4 - combiné rail-route/kombiniert Schiene-Strasse/ combined rail-road

- At - autorisation à temps/Genehmigung auf Zeit/ period permit
- Av - autorisation au voyage/Genehmigung je Fahrt/ journey permit
- C - contingentement/Kontingentierung/quota
- C1 - contingent spécial/Sonderkontingent/special quota
- C2 - à valoir sur contingent pour compte d'autrui/
/auf das Kontingent für gewerblichen Verkehr anzurechnen/
/to be applied to transport for hire or reward

- L - liberté totale/absolute Freiheit/total liberty
- La - régime de l'autorisation sans contingentement/
/Genehmigung ohne Kontingentierung/
/licence outside the quota
- Zc - zone courte/Nahverkehr/short distance haulage
- Zl - zone longue/Fernverkehr/longue distance haul.
- *) - pas d'accord/keine Vereinbarung/no agreement

Evolution du trafic total de marchandises par moyen de transport dans les Etats membres (en millions de tonnes/kilomètres)
 Entwicklung des Gesamtgüterverkehrs nach Verkehrssträngen in den Mitgliedstaaten (in Mio/t0/km)
 Evolution of total goods traffic by mode in the Member States (in millions of tonne/kilometers)

Pays membres (a)	1963				TOTAL	1972					Indices - Evolution 1963/1972				
	Fer (b)	Route (c)	Voie fluviale (d)	Oléoducs (e)		Fer (b)	Route (c)	Voie fluviale (d)	Oléoducs (e)	TOTAL	Fer (b)	Route (c)	Voie fluviale (d)	Oléoducs (e)	TOTAL
ALLEMAGNE	63.756	50.200(1)	39.513	4.921	158.390	65.680	87.500(1)	43.969	18.509	215.658	103	174	111	376	136
BELGIQUE	7.017	6.596(1)	4.779	-	18.392	7.675	14.322(1)	6.758	1.554	30.315	109	217	141	-	162
DANEMARK	1.619	8.200(1)	-	-	9.819	2.001	13.400(1) (5)	-	-	15.401	124	163	-	-	157
FRANCE	66.172	37.087	11.358	4.082	118.699	69.928	72.808	14.156	32.470	189.414	106	196	125	795	160
IRLANDE	358	1.715(4)	-	-	2.073	578	2.500(2)	-	-	3.078	161	148	-	-	148
ITALIE	17.002	45.170	297	731	63.200	17.844	58.986	391	10.766	87.987	105	131	132	1.472	139
LUXEMBOURG	650	115(2)	-	-	765	781	279(2)	10	-	1.070	120	243	-	-	140
PAYS-BAS	4.167	7.652(3)	20.201	1.206	33.226	3.071	13.900(3)	29.333	5.703	52.007	74	182	145	472	157
ROYAUME-UNI	25.178	57.000	242	891	83.311	21.025	84.000	91	3.032	108.148	84	147	38	340	130
TOTAL	195.919	213.735	76.360	11.831	487.875	183.643	347.693	94.708	72.034	703.078	101	163	124	609	144

SOURCES : Stat. ONU/ORG - 1973

- avec les exceptions ci-après :

QUELLE : - mit nachstehenden Ausnahmen :

- with the following exceptions:

(1) I R F

(2) Autres sources/ Andere Quellen/ Other sources

(3) Trafic intérieur uniquement/ Nur Binnenverkehr/ Internal traffic only

(4) 1964

(5) 1971

a) Pays membres/ Mitgliedstaaten/ Member States

b) Fer/ Eisenbahn/ Railway

c) Route/ Strasse/ Road

d) Voie fluviale/ Binnenschifffahrt/ Inland waterways

e) Oléoducs/ Oelleitungen/ Pipelines

(+) - Indices-évolution 1963/1972

- Indices-Entwicklung 1963/1972

- Indices of growth 1963/1972

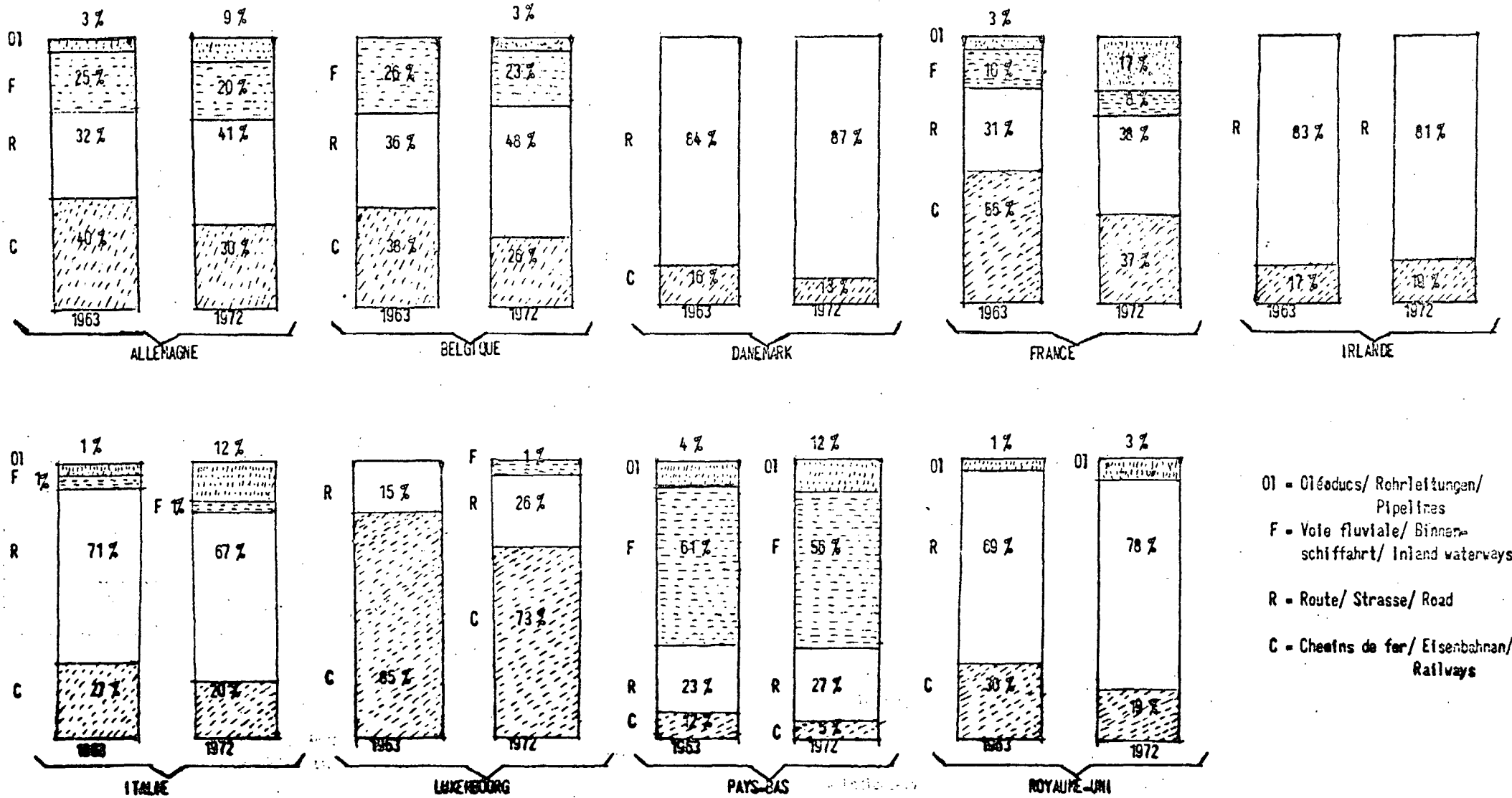
DOCUMENTATION STATISTIQUE

- TABLEAU 1 : - Evolution du trafic total de marchandises par moyen de transport dans les Etats membres (en millions de tonnes/kilomètres)
- Entwicklung des Gesamtgüterverkehrs nach Verkehrsträgern in den Mitgliedstaaten (in Mio to/km)
- Evolution of total goods traffic by mode in the Member States (in millions of tonne/kilometers)
- TABLEAU 2 : - Répartition du trafic marchandises selon les divers modes de transport sur la base des tonnes/km en 1963 et 1972
- Aufteilung des Güterverkehrs auf die einzelnen Verkehrsträger nach t/km für 1963 und 1972
- Distribution of goods traffic by mode of transport for 1963 and 1972, based on tonne/km
- TABLEAU 3 : - Nombre de véhicules routiers : camions / Anzahl der Strassenfahrzeuge : Lastkraftfahrzeuge / Number of road vehicles : Motor vans (trucks)
- TABLEAU 4 : - Nombre et capacité des véhicules routiers (camions, remorques, semi-remorques)
- Anzahl und Kapazität der Lastkraftfahrzeuge (LKW, Anhänger, Sattelanhänger)
- Number and load capacity of road motor vehicles (motor vans (trucks), trailers, semi-trailers).
- TABLEAU 5 : - Nombre de bateaux (automoteurs, chalands, barges)
- Anzahl der Schiffe (Motorschiffe, Kähne, Schubleichter)
- Number of boats (self-propelled barges, lighters, barges)
- TABLEAU 6 : - Résultats financiers: Evolution du produit moyen, en wagon complet, par tonne/km, des transports par chemins de fer, comparé aux prix à la consommation
- Finanzielle Ergebnisse : Entwicklung der Durchschnittserträge, in Wagenladungen, je to/km, für Eisenbahntransporte im Vergleich zum Verbraucherpreis
- Financial results : Growth of average revenues, by full wagon load, per tonne/km, carried out by rail, in comparison with consumer prices.
- GRAPHIQUE 7 : - Relation entre les indices du produit moyen, par t/km, des transports par fer, effectués par wagons complets, et des prix à la consommation, pour la période 1963/1973
- Relation zwischen den Indizes der Durchschnittserträge - je to/km - für Eisenbahntransporte in Wagenladungen und der Verbraucherpreise für den Zeitraum 1963/1973.
- Relation between the indices of average revenue, per tonne/km, carried out by rail in complete wagon load, and consumer prices for the period 1963/1973.
- TABLEAU 8 : - Evolution des frets rhénans, prix à la tonne / Entwicklung der Rheinfrachten, Preis pro Tonne / Growth of Rhine freight prices, price per tonne
- TABLEAU 9 : - Evolution des frets rhénans / Entwicklung der Rheinfrachten / Growth of Rhine freight prices : I N D I C E S
- TABLEAU 10 : - Evolution des prix de transport par route en Allemagne (Rép. Féd.))
- Entwicklung der Beförderungspreise im Güterkraftverkehr in der Bundesrepublik Deutschland) I N D I C E S
- Growth of road transport prices within the Federal Republic of Germany)

TABLEAU - Tabelle / Table

GRAPHIQUE - Graphische Darstellung / Graph

-Répartition du trafic marchandises selon les divers modes de transport sur la base des tonnes/kilomètres en 1963 et 1972
 -Aufteilung des Güterverkehrs auf die einzelnen Verkehrsträger nach t/km für 1963 und 1972
 -Distribution of goods traffic by mode of transport for 1972, based on tonne/km.



OI - Oléoducs/ Rohrleitungen/
 Pipelines
 F - Voie fluviale/ Binnen-
 schiffahrt/ Inland waterways
 R - Route/ Strasse/ Road
 C - Chemins de fer/ Eisenbahn/
 Railways

Tableau/Tabella/Tabelle 3

NOMBRE DE VEHICULES ROUTIERS : CAMIONS (x)

ANZAHL DER STRASSENFAHRZEUGE : LASTKRAFTFAHRZEUGE (x)

NUMBER OF ROAD VEHICLES : MOTOR VANS (TRUCKS) (x)

PAYS MEMBRES (a)	NOMBRE DE CAMIONS EN MILLIERS (b)		INDICES DU NOMBRE DE CAMIONS (1958 = 100) (c)		NOMBRE DE CAMIONS PAR 1000 HABITANTS (d)		NOMBRE DE CAMIONS PAR KM ² DE LA SUPERFICIE DU PAYS (e)	
	1962	1971	1962	1971	1962	1971	1962	1971
ALLEMAGNE (R.F.A.)	782,8	1.203,5	121	167	14,3	20,3	3,2	4,8
BELGIQUE	180,0	229,0	115	147	19,5	23,7	5,9	7,5
DANEMARK	201,0	219,4	152	172	43,2	44,2	4,7	1973,1
FRANCE	1.782,9	2.849,2	124	199	37,9	55,6	3,2	5,2
IRLANDE **)	447 (1)	445 (1)	103	103	15,8	15	0,6	0,6
ITALIE	774,3	1.297,9	151	254	15,4	24,0	2,6	3,4
LUXEMBOURG	9,6	9,1	127	120	30,0	26,6	3,7	3,5
PAYS-BAS	176,3	339,0	136	261	14,9	25,7	4,3	9,3
ROYAUME-UNI	1.524,5	1.623,5(1)	118	126	29,4	30,0	6,6	7,1
TOTAL	5.431,4	7.770,6						

Sources : Bulletin annuel de statistiques de transports pour l'Europe (Nations Unies)

Quelle : Jahresbulletin der Transportstatistik für Europa (Vereinte Nationen)

Mention of source : Annual bulletin of Transport Statistics for Europe (United Nations)

a) Mitgliedstaaten/Member States

b) Anzahl der Lastkraftfahrzeuge/Number of motor vans (trucks)

c) Index der Anzahl der Lastkraftfahrzeuge/Index of the number of motor vans (trucks)

d) Anzahl der Lastkraftfahrzeuge pro 1000 Einwohner/Number of motor vans (trucks) per 1000 inhabitants

e) Anzahl der Lastkraftfahrzeuge pro km² der Grundfläche des Landes/Number of motor vans (trucks) per km² of the country's area.

(x) y compris les tracteurs, non compris remorques, ni semi-remorques

(1) non compris les tracteurs
Zugmaschinen ausgenommen
excepted road tractors**) - Les chiffres ayant été fournis
trop tard, il n'y avait pas moyen
d'en tirer des conclusions pour le
rapport (VII/176/75)- Da das Zahlenmaterial zu spät gelie-
fert wurde war es nicht mehr möglich
Schlussfolgerungen für den Bericht
(VII/176/75) zu ziehen.- There was no possibility of drawing
conclusions for the report
(VII/176/75) as the figures arrived

Nombre et capacité des véhicules routiers (camions, remorques, semi-remorques)
 Anzahl und Kapazität der Lastkraftfahrzeuge (LKW, Anhänger, Sattelanhänger)
 Number and load capacity of road motor vehicles (motor vans (trucks) trailers, semi-trailers)

PAYS MEMBRES	Nombre de véhicules a)		% d'augmentation (b)	Tonnage		% d'augmentation e)
	1962	1971		1962	1971	
ALLEMAGNE						
d) compte d'autrui	219.474	274.759	+ 25,2 %	1.318.726	2.191.740	+ 66,2 %
e) compte propre	729.914	1.064.077	+ 45,8 %	1.943.897	3.411.590	+ 75,5 %
FRANCE						
d) compte d'autrui	135.750	264.785 x)	+ 95 %	792.000	1.990.937 x)	+ 151,4 %
e) compte propre	1.830.920	2.810.671 x)	+ 53,5 %	3.247.000	5.504.241 x)	+ 69,5 %
ITALIE						
d) compte d'autrui	175.609	212.321 xx)	+ 20,9 %	1.060.657	1.302.549 xx)	+ 22,0 %
e) compte propre	350.705	819.669 xx)	+ 133,7 %	753.431	1.442.101 xx)	+ 91,4 %
PAYS-BAS						
d) compte d'autrui	.	.	.	.	.	.
e) compte propre	.	.	.	.	.	.
BELGIQUE						
d) compte d'autrui	20.181	25.860	+ 23,1 %	.	319.627	.
e) compte propre	189.546	193.405	+ 2,0 %	.	695.744	.
LUXEMBOURG						
d) compte d'autrui	.	.	.	.	.	.
e) compte propre	.	.	.	.	.	.

x) chiffres pour 1960/Angaben für 1960/figures for 1960

xx) chiffres pour 1967, y compris les bicycles à moteur pour le transport de marchandises
 Angaben für 1967, einschliesslich zweirädriger Kraftfahrzeuge zur Beförderung von Gütern
 figures for 1967 include motor-bicycles for goods transport

a) Nombre des véhicules/Anzahl der Fahrzeuge/Number of vehicles

b) % d'augmentation/prozentuale Erhöhung/increase in per cent

c) tonnage/beförderte Menge/tonnage

d) transport pour compte d'autrui/gewerblicher Verkehr/professionnel transport

e) transport pour compte propre/Werkverkehr/transport on own account

Source : Statistique des transports, Office Statistique des C.E.

Quelle : Transportstatistik, Statistisches Amt der E.G.

VI/137/75

Tableau/Tabelle/Table 5

Nombre de bateaux / Anzahl der Schiffe / Number of boats

(Automoteurs, chalands, barges / Motorschiffe, Kähne, Schubleichter / Self-propelled barges, lighters, barges)

Pays membres/mittgliedstaaten Member States	Automoteurs/Motorschiffe/ self propelled barges		Chalands/Kähne/ lighters		Barges/Schubleichter/ barges		TOTAL	
	1965	1971	1965	1971	1965	1971	1965	1971
ALLEMAGNE R.F.G.	11.007	10.169	3.202	1.372	175	743	14.384	12.284
BELGIQUE	8.454	7.879	1.159	353	50	29	9.663	8.321
FRANCE	8.615	8.450	4.196	873	932	1.588	13.743	10.911
ITALIE	740	562	2.276	423	-	31	3.016	1.016
LUXEMBOURG	-	17	-	-	-	-	-	17
PAYS-BAS	17.411	18.036	11.334	10.234	226	663	28.971	20.933
	46.227	45.113	22.167	13.255	1.383	3.114	69.777	61.482

Source : Statistique des transports, Office Statistique des C.E.

Quelle : Transportstatistik, Statistisches Amt der E.G.

Source : Transport statistics, Stat. Office of the E.C.

RESULTATS FINANCIERS : Evolution du produit moyen, en wagon complet, par tonne-kilomètre, des transports par chemins de fer comparé aux prix à la consommation

Tabelle/ Tabela/ Tabela 6

VII/137/75

FINANZIELLE ERGEBNISSE: Entwicklung der Durchschnittserträge in Wagenladungen je t/km, für Eisenbahntransporte im Vergleich zum Verbraucherpreis
 FINANCIAL RESULTS : Growth of average revenues by full wagon-load, per tonne/km, carried out by rail, in comparison with consumer prices

		1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
DB	ALLEMAGNE : D-Mark	0.071	0.069	0.067	0.070	0.069	0.069	0.069	0.074	0.084	0.090	0.094
	indices :	100	97.2	94.4	98.6	97.2	97.2	97.2	104.2	118.3	126.3	132.4
	a) indice prix consommation	100	102.3	105.8	109.5	111.1	112.7	116	120.4	126.6	133.9	141.9
	b) indice prix de gros	100	100.2	102.3	103.4	102.9	97.0	99.4	105.0	109.9	143.9	121.2
SNCB	BELGIQUE : Franc belge	0.856	0.838	0.811	0.849	0.851	0.834	0.824 ^(a)	0.921	1.026	1.041	1.056
	indices :	100	97.9	94.7	99.2	99.4	97.4	96.3	107.6	119.9	121.2	123.4
	a)	100	104.17	108.4	112.93	116.15	119.35	123.83	128.57	134.26	141.57	149.81
	b)	100	104.77	105.8	108.2	107.1	107.4	112.6	118.0	117.4	122.2	133.2
DSB	DANEMARK : Couronne danoise					0.119(+)	0.124(+)	0.127(+)	0.122(+)	0.124(+)	0.120(+)	0.135(+)
SNCF	FRANCE : Franc français	0.062	0.061	0.060	0.065	0.076	0.069	0.072	0.075	0.082	0.092	0.096
	indices :	100	98.4	96.8	104.8	117.7	111.3	116.1	121	132.3	132.3	138.7
	a)	100	103.2	105.9	108.8	111.8	116.9	123.9	130.8	137.8	146.2	153.3
	b)	100	101.6	103.1	105.4	104.6	106.1	115.2	125.6	129.0	136.3	149.2
FS	ITALIE : Lire											
	indices :	100										
	a)	100	105.9	110.7	113.2	117.5	119.0	122.2	128.2	134.5	142.2	152.6
	b)	100	103.3	105.0	106.5	106.3	106.7	111.0	119.0	123.0	128.0	139.7
CFL	LUXEMBOURG: Franc lux.	1.690	1.641	1.665	1.666	1.737	1.870	1.751	1.772	1.590	1.696	1.783
	indices :	100	97.1	98.5	116.3	102.8	110.7	103.6	104.9	94.1	100.4	105.5
	a)	100	103.10	106.53	109.35	112.47	115.42	118.87	123.55	129.32	136.07	144.33
	b)											
BR	ROYAUME-UNI : livre sterling								0.791(-)	0.817(-)	0.808(-)	0.806(-)
	indices :											
CIE	IRLANDE : livre sterling											
	indices :											
NS	PAYS-BAS: Florin	0.050	0.050	0.051	0.052	0.051	0.051	0.053	0.057	0.057	0.063	0.064
	indices :	100	100	102	104	102	102	106	114	114	126	128
	a)	100	105.8	110.7	117.1	121.2	125.7	135	141	151.7	163.6	173.7
	b)	100	106	110	115	115	116	117	124	125	129	140

a) y compris les envois de détail (par tonne transportée) Stückgutsendungen (in to) inbegriffen part-load consignments included

a) indice prix consommation Index d. Verbraucherpreise consumer price index

b) indice prix de gros Index d. Großhandelspreise wholesale price index

c) y compris les trafics routiers et maritimes Kraftwagengüterverkehr u. Seeverkehr inbegriffen road and seatraffic included

UIC: Les chiffres sont probants. La concurrence a empêché la hausse des prix. Dégradation des résultats financiers du fer.

- Nach Auffassung UIC zeigen diese eindrucksvollen Zahlen, dass die Wettbewerbslage ein Ansteigen der Preise verhindert u. sich dadurch die finanzielle Lage der Eisenbahnen ständig verschlechtert hat.

- The figures are conclusive. Competition has prevented a rise in prices. Deterioration in the financial position of the railways.

Source: Statistique internationale UIC et statistique conjoncturelle O.S.C.E. / Internationale Eisenbahnstat. (U.I.C.) u. Konjunkturstat. des Stat. Amtes der EG
 International railway statistics and statistics of the Stat. Office of the E.C.

ANNEXE au tableau)
ANLAGE zur Tabelle) 6
ANNEX to table)

RESULTATS FINANCIERS : Evolution du produit moyen, en wagon complet, par tonne-kilomètre, des transports par chemins de fer, comparé au prix à la consommation

FINANZIELLE ERGEBNISSE : Entwicklung der Durchschnittserträge in Wagenladungen je t/km, für Eisenbahntransporte im Vergleich zum Verbraucherpreis

FINANCIAL RESULTS : Growth of average revenues by full wagon-load, per tonne-km, carried out by rail, in comparison with consumer prices

C I E (Coras Iospair Eireann)	IRELAND: Livre ster- ling =)	1963 ^{a)}	1964 ^{a)}	1965 ^{a)}	1966 ^{a)}	1967 ^{a)}	1968 ^{a)}	1969 ^{a)}	1970 ^{a)}	1971 ^{a)}	1972 ^{a)}	1973 ^{a)}
		Indices:	100	102	107	96	92	83	83	91	89	97	101
a) indice prix consommation	100	107	112	115	119	125	134	145	158	171	191	
b) indice prix de gros	100	106	110	112	115	122	131	137	145	160	188	

^{a)} exercice prenant fin le
31 mars
Jahresabschluss : 31. März
Years ending : 31 March

a) Indices prix consommation
Index des Verbraucherpreises
Consumer price index

b) indice prix de gros
Index des Grosshandelspreises
Wholesale price index

SOURCES: CIE et "Central Statistics Office" - DUBLIN

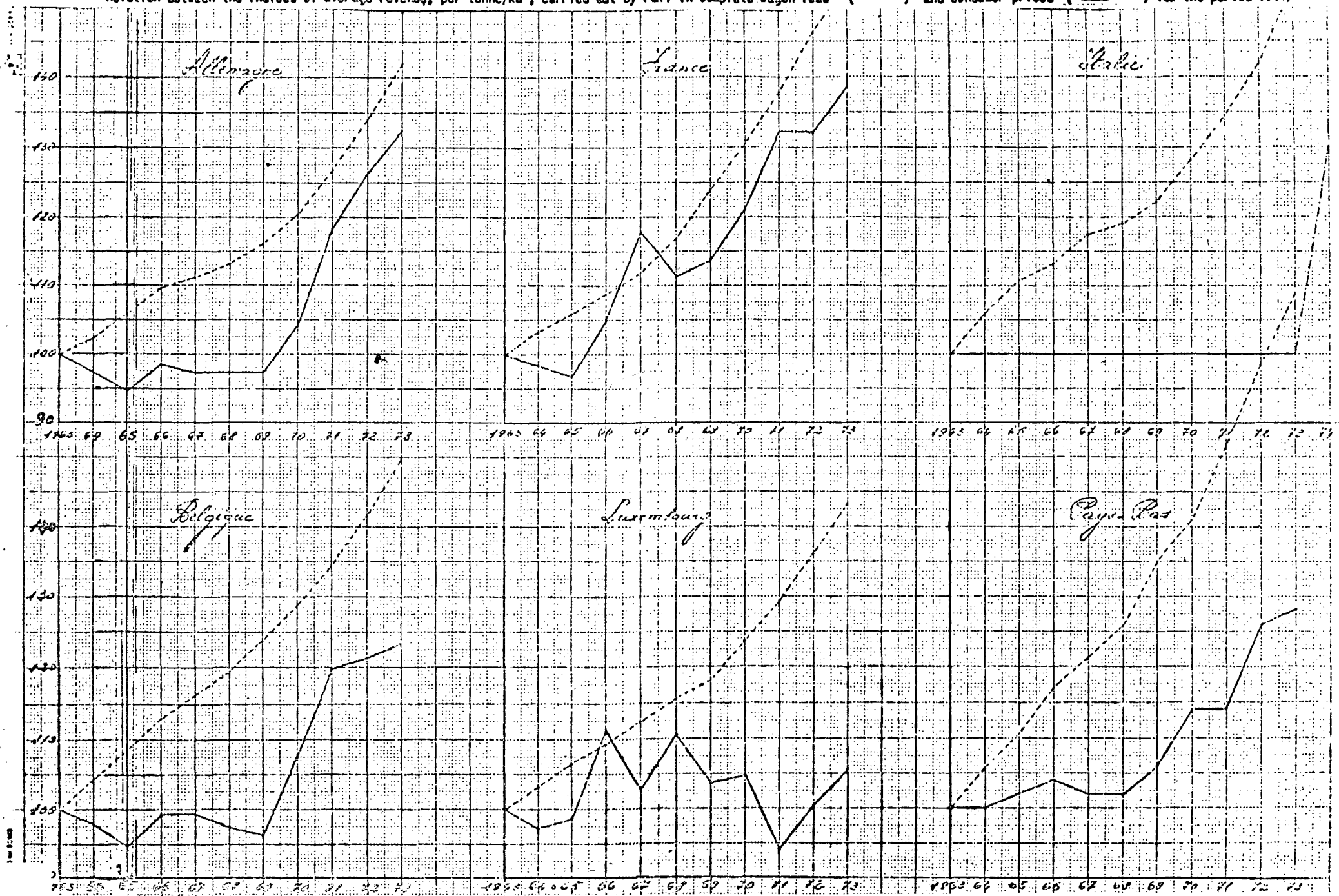
-) les résultats sont exprimés en "pence"
- in "pence" ausgedrückt
- expressed in "pence"

Les chiffres ayant été fournis trop tard, il n'y avait pas moyen d'en tirer des conclusions pour le rapport (VII/176/75).

Da das Zahlenmaterial zu spät geliefert wurde war es nicht mehr möglich, Schlussfolgerungen für den Bericht (VII/176/75) zu ziehen.

There was no possibility of drawing conclusions for the report (VII/176/75) as the figures arrived too late.

Relation entre les indices du produit moyen, par t/ka, des transports par fer effectués par wagons complets (—) et des prix à la consommation (- - -) pour la période 1963/1973
 Relation zwischen den Indices des Durchschnittstrags - je t/ka - für Eisenbahntransporte in Wagenladungen (—) und Verbraucherpreisen (- - -) für den Zeitraum 1963/1973
 Relation between the indices of average revenue, per tonne/ka, carried out by rail in complete wagon load (—) and consumer prices (- - -) for the period 1963/1973.



VII/137/75

Tableau/Tabelle/Table 8

Evolution des frets rhénans / Entwicklung der Rheinfrachten / Growth of Rhine freight prices

Prix à la tonne / Preis pro Tonne / Price per tonne

Relation/Verkehrsverbindung/ Routes	Marchandise/ Gutart/Goods	Monnaie Währung Currency	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972
Rotterdam - Duisburg - Ruhrort	Minéral/Erz/ Ores	DM/tonne	3,35	3,35	3,30	3,30	3,10	3,10	3,10	4,13	3,22	3,13
Rotterdam - Mannheim	Charbon/Kohle/ Solid Fuel	DM/tonne	8,90	8,90	8,90	8,90	8,90	8,90	8,90	10,25	10,42	11,42
Rotterdam - Kehl	Céréales/Getreide Cereals	DM/tonne	12,55	12,55	8,80	8,80	7,50	7,50	11,25	15,75	16,21	17,38
Karlsruhe - Anvers	Gravier/Kies/ Gravel	FB/tonne	55,3	58	56	57,33	60,33	64,17	77,22	100	90	80

Source : Rapport annuel de la Commission Centrale pour la navigation du Rhin.

Quelle : Jahresbericht der Zentralkommission für die Rheinschifffahrt.

Source : Annual report of the Central Commission for the Rhine.

Evolution des frets rhénans/Entwicklung der Rheinfrachten/Growth of Rhine freight prices

Indices

		1963	1964	1965	1966	1967	1968	1969	1970	1971	1972
Rotterdam-Duisburg-Ruhrort	Minerals/Erz/ Ores	100	100	98,5	98,5	92,5	92,5	92,5	123,3	97,9	93,4
a) indice prix consommation	DM	100	102,3	105,8	109,5	111,1	112,7	116	120,4	126,5	133,9
b) indice prix de gros		100	100,2	102,3	103,4	102,9	97	99,4	105	109,9	113,9
Rotterdam-Mannheim	Charbon/ Kohle/Solid fuel	100	100	100	100	100	100	100	115,2	117,1	123,3
a)	DM	100	102,3	105,8	109,5	111,1	112,7	116	120,4	126,6	133,9
b)		100	100,2	102,3	103,4	102,9	97	99,4	105	109,9	113,9
Rotterdam-Kehl	Céréales/ Getreide/ cereals	100	100	70,1	70,1	59,8	59,8	89,6	125,5	129,2	138,5
a)	DM	100	102,3	105,8	109,5	111,1	112,7	116	120,4	126,5	133,9
b)		100	100,2	102,3	103,4	102,9	97	99,4	105	109,9	113,9
Karlsruhe-Anvers	Gravier/Kies/ gravel	100	104,9	101,3	103,7	109,1	116,4	139,7	190,8	162,7	144,6
a)	FB	100	104,17	108,4	112,93	116,15	119,35	123,83	128,67	134,26	141,57
b)		100	104,7	105,8	108,2	107,1	107,4	112,8	113,0	117,4	122,2

a) indice prix consommation
Index des Verbraucherpreises
consumer price index

b) indice prix de gros
Index des Grosshandelspreises
wholesale price index

Tableau/Tabella/Table 10

Evolution des prix de transport par route en Allemagne (R.F.)

Entwicklung der Beförderungspreise im Güterkraftverkehr in der Bundesrepublik Deutschland

Growth of road transport prices within the Federal Republic of Germany

(Indices)

Année Jahr Year	Index général des recettes t/km pour le transport de marchandises Allgemeiner Index der Erträge je t/km für den Gütertransport General index of receipts per tonna/km for goods transport	Index général des prix de gros Allgemeiner Index der Grosshandelspreise General index of wholesale prices	Index général des prix à la consommation Allgemeiner Index der Verbraucherpreise General index of consumer prices
1963	100	100	100
1964	101,7	100,2	102,3
1965	100,9	102,3	105,8
1966	106,1	103,4	109,6
1967	107,9	102,9	111,1
1968	106,1	97,0	112,7
1969	107,9	99,4	116,0
1970	114,1	105,0	124,0
1971	123,8	109,6	126,6
1972	131,9	113,9	133,9
1973	139,8		