**Assessment of the evolution of road transport market under COVID-19 crisis in 2020 - 2022 and the impact of facilitation measures introduced by the European Union and the member countries of the ECMT Multilateral Quota system of the International Transport Forum (ITF)**

The current study is aimed to measure both the impact of the COVID-19 pandemic on the freight road transport in the ITF Member countries as well as the willingness of the industry to embark on digitalization and greening of the hauliers work. The study is designed to compare the situation before the pandemic (January 2020) to the situation in the months with the strictest restrictions in Europe up to the months with more lax rules, after the introduction of the new European legislation.

The study will focus on the international road transport, performed by the trucks with the permissible maximum weight over 3.5 tons, i.e., professional transport, performed in the European Union (EU) with the use of Community licenses and wider European scale, including both EU and non–EU countries, with the use of ECMT permits, issued by ITF or based on bilateral agreements.

The impact shall be measured via the use of qualitative and quantitative indicators, grouped by months, from January 2020 till January 2022.

The overall assumption is to analyze whether the COVID-19 pandemic had an impact on freight road transport and whether it was a negative impact. Additionally, the study will attempt to indicate whether the national legislations as well the European Omnibus Regulations[[1]](#footnote-1) had an impact on freight transport.

The so-called Omnibus I and II Regulations were the major European Union texts, introducing flexibilities that were aimed at allowing transport companies to continue performing their business activities despite coronavirus lockdowns. These temporary measures allowed for extension of validity of the certificates and licences.

Enabling automatic extension of validity of the certificates and licences gave more legal certainty to companies, allowing them to keep mobility and ensure operations alongside the supply chains.

Extension of the certificates and licences of transport hauliers came in handy in the situation where COVID-19 temporary restrictions and bans and office closures made the formalities difficult. Automatic extension would apply, i.e., to driving licences, roadworthiness tests for motor vehicles and the hauliers’ licences.

The aim of these legislative texts was to ensure achieving more unanimity between the countries in the European Union concerning accepting the licenses and certificates of the EU Member States that were not formally extended due to COVID-19-induced disturbances, such as closed borders or delays at the border crossing points, difficulty to submit the request on time or inability of the public administration to process the request in a timely manner.

These legislative tools allowed ensuring functioning of the internal market of the European Union, even under the new and more difficult circumstances.

The European Parliament voted the text of the first Regulation, Omnibus I, on 15 May 2020 and it was published on 25 May 2020. The text applied from 4 June 2020, and Article 3(4), Article 4(6), Article 5(5), Article 7(5), Article 8(5) and Article 11(5) applied from 28 May 2020. Omnibus II Regulation, published on 16 February 2021, extended certain measures further.

**Countries – members of the International Transport Forum** that participate in the ECMT Multilateral quota system [of transport licences]:

Albania, Armenia, Austria, Azerbaijan, Belarus, Belgium, Bosnia-Herzegovina, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Montenegro, Netherlands, North Macedonia, Norway, Poland, Portugal, Romania, Russian Federation, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine and United Kingdom.[[2]](#footnote-2)

**QUESTIONNAIRE:**

The questions are assembled in 4 sets, 2 of them are directed to all the participants, 1 is addressed to the road transport hauliers and 1 to the hauliers’ associations. The questions are divided into Quantitative Information and Qualitative Information. Questions regarding relevance, coherence, and the questions for associations are of a general nature. The value added part as well as all the questions for the hauliers are to be answered for every month from January 2020 till January 2022.

The questions on coherence can be answered: “YES/NO,” and further explanations and comments from the participants are always very welcome.

PART FOR ALL PARTICIPANTS

**GENERAL QUESTIONS**

**1. Relevance:**

**PART A**

**1. Please briefly describe the activity of your organization/institution/company and in particular whether you are involved in road transport activities, passenger or freight.**

**A:**

**2. Please indicate whether you are part of larger organization/institution/company (e.g., ministry, hauliers’ organization, etc.).**

**A:**

PART FOR ALL PARTICIPANTS

**QUALITATIVE INFORMATION**

**2. Coherence:**

**PART B**

**a) Is performing road transport operations more difficult now than before the COVID-19 pandemic? (YES/NO)**

**A:**

**b) Do you assess the situation at the start of the COVID-19 pandemic but before the introduction of the Omnibus I and II Regulations as more difficult to perform road transport activities than now?** **(YES/NO)**

**A:**

**c) Did you use the possibilities offered by Omnibus I and II Regulations (e.g., automatic extension of the validity of certificates or licenses)? (YES/NO)**

**A:**

**d) Do you plan to continue your road transport activities in 2022? (YES/NO) Please explain and describe in a few words the current situation.**

**A:**

**e) Do you need support from the EU level, ITF/OECD or other international organization in order to continue your road transport activity in 2022? (YES/NO)**

**A:**

**f) Do you need support from your national government to continue road transport activity in 2022? Please develop your answer shortly. (YES/NO)**

**A:**

**g) How do you assess the role of the ECMT license system in international road transport activities in 2021?**

**A:**

**3. Value added:**

**a) Situation at the borders and using licenses/certificates – from January 2020 till January 2022, per month.**

**A:**

**b) Do you see the difference at the borders comparing situation in January 2020, January 2021 and January 2022, per month?**

**A:**

**c)** **Situation at the borders and using of licenses/certificates after introducing strict national measures.**

**A:**

**d) Do you see the difference at the borders at the beginning of 2020 compared to current situation?**

**A:**

**e) Situation at the borders and using of licenses/certificates after introduction of the Omnibus I and II Regulations.**

**A:**

**f) Do you see the difference at the borders now compared to January 2020?**

**A:**

**g) How could you describe the current situation at the borders and using of licenses and certificates in January 2022? Do you see the difference at the borders in January 2020 compared to January 2021 and January 2022?**

**A:**

**h) Can you provide any other examples of good practice, guidelines or other guidance, minimum standards, contingency plans available, including from non-European countries?**

**A:**

PART FOR THE HAULIERS

**QUANTITATIVE INFORMATION**

**1. General Information:**

**a) Number of road transport haulier companies (per month)**

**A:**

**b) Number of trucks (per month)**

**A:**

**c) Number of trucks owned overall**

**A:**

**d)** **Number of trucks owned over 3.5 tons**

**A:**

**e) Number of trucks owned inclusive and below 3.5 tons**

**A:**

**f) Number of trucks leased/hired overall**

**A:**

**g)** **Number of trucks leased/hired over 3.5 tons**

**A:**

**h)** **Number of trucks leased/hired inclusive and below 3.5 tons**

**A:**

**2. Effectiveness:**

**a) Number of performed ton-kilometers (per month) in cross-border relations in international road transport**

**A:**

**b) Number of road transport orders of goods per month in international relations (per month)**

**A:**

**c) Average time of delivery of a product to the final destination (per month)**

**A:**

**d) Number of drivers (per month)**

**A:**

**e) Decrease/increase in earnings (per month) in percentage**

**A:**

**3. Cost Efficiency:**

**a) What financial costs did you incur in order to perform freight transport operations during COVID-19 pandemic as a result of the Regulations or other rules, such as social distancing and disinfection?**

**A:**

**b) By how much, in %, the operational costs of the road transport enterprises changed (per month)?**

**A:**

**c) What financial costs did you incur in order to perform freight transport operations during COVID-19 pandemic as the result of performing obligatory tests for truck drivers (per month)?**

**A:**

**d) What financial costs did you incur in relation to the obligation to quarantine the drivers during COVID-19 pandemic (per month)?**

**A:**

**e) What additional costs did you incur (non-financial) during the COVID-19 pandemic (per month)?**

**A:**

**f) How many operations needed a change of route due to COVID-19 response/blockages and what was the additional cost (per month)?**

**A:**

**g) Was there an additional cost of employing the drivers (per month)?**

**A:**

**h) How did the costs of functioning of a company change when comparing the situation from January 2020 till January 2022, per month (% growth/decrease)?**

**A:**

PART FOR THE ASSOCIATIONS

**a) Number of companies loosing financial liquidity (per month)**

**A:**

**b) Number/percentage of bankruptcies of the international road transport companies (per month and for freight and passenger transport)**

**A:**

1. Regulation (EU) 2020/698 of the European Parliament and of the Council of 25 May 2020 laying down specific and temporary measures in view of the COVID‐19 outbreak concerning the renewal or extension of certain certificates, licences and authorisations and the postponement of certain periodic checks and periodic training in certain areas of transport legislation, OJ L 165, 27.5.2020, p. 10–24:

   <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2020.165.01.0010.01.ENG>.

   Regulation (EU) 2021/267 of the European Parliament and of the Council of 16 February 2021 laying down specific and temporary measures in view of the persistence of the COVID-19 crisis concerning the renewal or extension of certain certificates, licences and authorisations, the postponement of certain periodic checks and periodic training in certain areas of transport legislation and the extension of certain periods referred to in Regulation (EU) 2020/698 (Text with EEA relevance), OJ L 60, 22.2.2021, p. 1–20:

   <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021R0267&from=EN>. [↑](#footnote-ref-1)
2. Source: International Transport Forum Website, <https://www.itf-oecd.org/multilateral-quota>. [↑](#footnote-ref-2)