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THE IMPACT OF THE MARKET STRUCTURE ON SAFETY AND SECURITY IN BSR: LITHUANIA POINT OF VIEW

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In order to investigate the impact of market structure pattern changes on the compliance of transport companies with safety and security regulations in Lithuania the survey was performed. The respondents of the survey were road haulage firms and authorities related with road transport. It was indicated that overall road safety situation in BSR of international HGV transport as good or very good except Russia and Byelorussia. Safety culture of these countries drivers is behind other countries.

Drive and rest hours were considered as most problematic regulatory issue concerning traffic safety. The cargo securing is quite a big problem and security risk mainly materializes on the borders.

Keywords: survey, transport, security, safety

1. Introduction

The research project “The impact of the market structure on safety and security in Baltic Sea Region: Lithuania point of view” is part of the C.A.S.H. project. The survey in Lithuania was performed at the beginning of 2011. The task of the survey is to identify changes in the structure of logistics and transport markets that increase competition and tend to drive down profitability affect negatively the level of compliance with the safety and security regulations. In order to investigate the impact of market structure pattern changes on the compliance of transport companies with safety and security regulations. The respondents of the survey were road haulage firms and authorities related with road transport. The interviews were carried out of team of graduate students of transport management and logistics at Vilnius Gediminas Technical University.

The questionnaire was developed by Lauri Ojala and Hari Lorenz (Turku School of Economics – Turku University).

The focus is on the following themes:

- The market for international Heavy Goods Vehicles (HGV) road freight transport in Baltic Sea Region;
- Regulatory framework of border crossing HGV traffic and the enforcement of it;
- Road safety of border crossing HGV traffic, including safety culture;
- Security issues relating to border-crossing HGV transport.

2. Survey Data Analysis

The research started with the market structure questions. Neither the assessment of the overall availability of international HGV road transport capacity nor the quality was seen as a bottleneck in BSR countries but they are quite problematic for Russia and Belarus /see Table 1/.

Table 1. Assessment of availability, quality, profitability, competitiveness, traffic safety according to Lithuanian stakeholders (–4 very = poor, 0 = non poor nor good; 4 = very good)

	2005–2006 m.				End of 2010			
	LT	DE, DK, FI, SE, NO	EE, LV, PL	RU & BY	LT	DE, DK, FI, SE, NO	EE, LV, PL	RU & BY
Availability of international HGV road transport capacity	1	2	1	–1	1	2	1	–1
Operational quality	1	2	0	–1	2	2	1	0
Profitability	2	2	1	1	0	1	1	2
Competitiveness	1	1	1	0	2	0	2	1
Traffic safety,	–1	2	–1	–2	1	3	1	–2
Regulatory framework for traffic safety	0	2	0	–2	1	2	1	–1

All interviewers shared they view concerning the profitability of international HGV transport. It was identified that profitability during the last five years in BSR countries decreased from its former level. Profitability of Russia and Belarus is increasing.

It was identified that the competitiveness during five years significantly increased in Lithuanian and other Baltic States. The competitiveness of Russia and Belarus is rising as result of a series of protective administrative measures.

In view of traffic safety regulatory framework Lithuania stakeholders indicated small progress in Baltic States which is the result of the EU-membership.

General traffic safety situation in Lithuania during last five years has improved significantly (Fig. 1). It is a result of armamentarium: better road transport police technical equipment, more effective road police and transport inspectorate work, bigger penalties for traffic rules violations, better quality of roads infrastructure, more modern transport means.

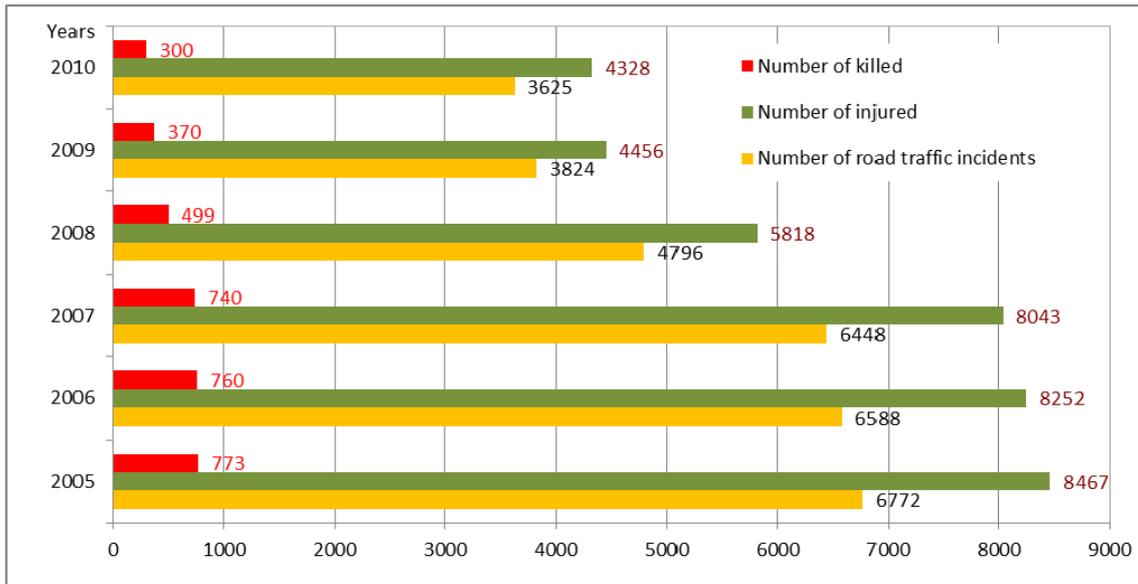


Figure 1. Traffic safety of Lithuanian Road Transport

The road transport incidents with fatalities that attended heavy means transport in 2010 is about 10 percent. That shows quite a high professional quality of truck drivers. In more than of 50 percent of accidents HGV drivers fault was unidentified.

For Lithuanian truck drivers in Lithuania most problematic issues are speeding and drive and rest hours. Table 2.

Table 2. Assessment of most problematic regulatory issues according transport stakeholders

View of international HGV traffic safety in Lithuania		
Rank: 1 = the most problematic; 2 = the 2 nd most problematic; 3 = the 3 rd most problematic etc.		
For an Lithuanian truck and driver in Lithuania		
Regulatory issues	Enforcement rank	Non-compliance rank
Drive and rest hours (AETR)	1	2
Speeding	2	1
Cabotage	4	2
Cargo documents	3	4
Cargo securing	3	3
Dangerous Goods transports (ADR)	3	2
Overloads	3	2
Vehicle documents	3	4
Technical standard of vehicles incl. trailers	3	4
Driver licenses and certification	4	3
Alcohol and/or drug use of drivers	2	4
For a truck and a driver originating from another EU country in Lithuania		

The continuation of Table 2

View of international HGV traffic safety in Lithuania		
Rank: 1 = the most problematic; 2 = the 2 nd most problematic; 3 = the 3 rd most problematic etc.		
<i>For an Lithuanian truck and driver in Lithuania</i>		
Regulatory issues	Enforcement rank	Non-compliance rank
Drive and rest hours (AETR)	1	1
Speeding	2	2
Cabotage	2	3
Cargo documents	2	3
Cargo securing	3	3
Dangerous Goods transports (ADR)	2	4
Overloads	4	2
Vehicle documents	3	4
Technical standard of vehicles incl. trailers	4	–
Driver licenses and certification	4	–
Alcohol and/or drug use of drivers	4	4
<i>For a truck and a driver originating from Russia and Belarus in Lithuania</i>		
Regulatory issues	Enforcement rank	Non-compliance rank
Drive and rest hours (AETR)	1	2
Speeding	3	3
Cabotage	1	2
Cargo documents	2	3
Cargo securing	4	–
Dangerous Goods transports (ADR)	–	2
Overloads	4	3
Vehicle documents	2	3
Technical standard of vehicles incl. trailers	4	3
Driver licenses and certification	3	–
Alcohol and/or drug use of drivers	3	2

For a drivers originating from another EU country in Lithuania most problematic issues are drive and rest hours, speeding and overloads.

For a truck and a driver originating from Russia and Belarus in Lithuania most problematic issues are drive and rest hours, cabotage, dangerous goods transportation and alcohol use as well as technical quality of HGV.

3. Conclusions

1. The current overall availability of international HGV in BSR countries is neither good nor pure. Operation quality in Russia and Belarus is behind other countries.

2. Drive and rest hours are considered as most problematic regulatory issue concerning traffic safety.

3. Enhancing cooperation between authorities involved in safety and border crossing HGV, legislative changes concerning liability of shippers and carriers will make international road freight transport safer, more predictable and affordable in Baltic Sea region.

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