

Mobility Package 2022

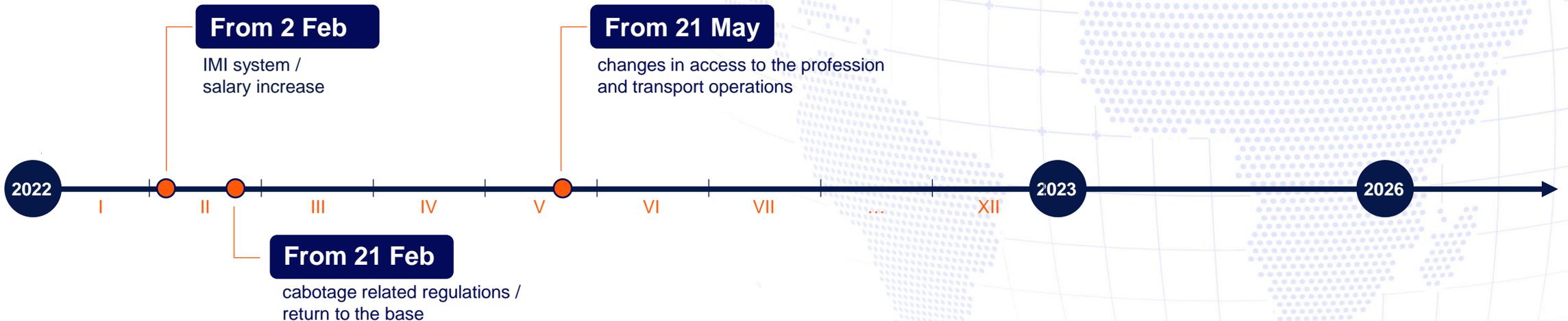
Legal changes and their impact on asset-based carriers

Glogow, February 2022

Introduction

The Mobility Package - in other words, is legislation package aimed at regulating road transport for all **European Union countries**.

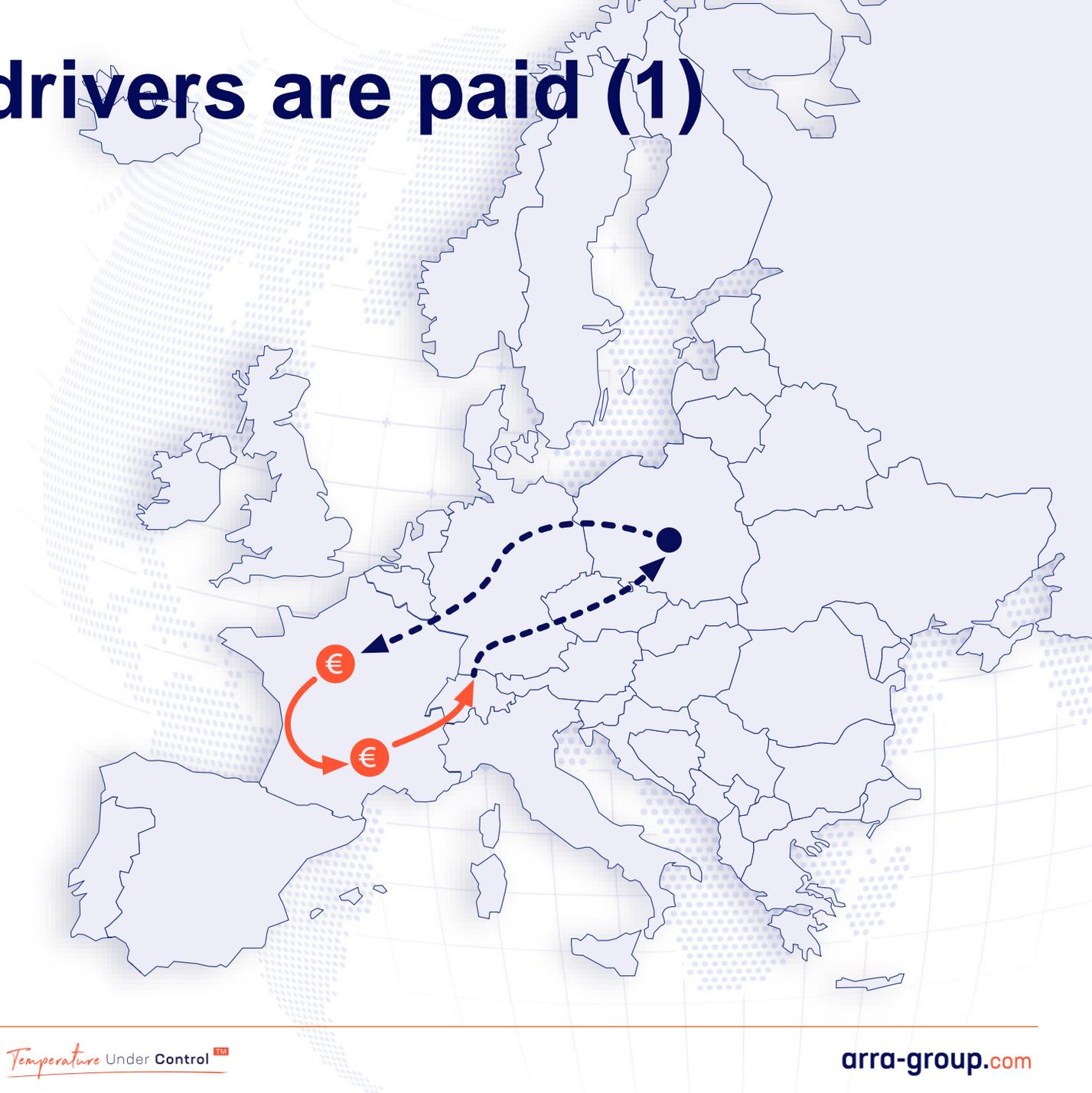
The first changes were introduced as early as in August 2020 and mainly covered driving and resting times for truck drivers staying within the European Union. Now, on February 2nd 2022, we are experiencing another stage which has a great impact on carriers' operations expenses. And that's not the end of the changes. We are expecting more of them in the coming months and years.



Changes in the way drivers are paid (1)

Sector wages

In the case of cross-trade and cabotage transport, drivers will be paid the sector wage adequate to the country where the service is performed, i.e. from €10 up to a dozen or so per hour. For comparison sector hourly rate in Western Europe are **3-4 times higher** than minimum wage in CEE countries.



Changes in the way drivers are paid (2)

Cancellation of allowances

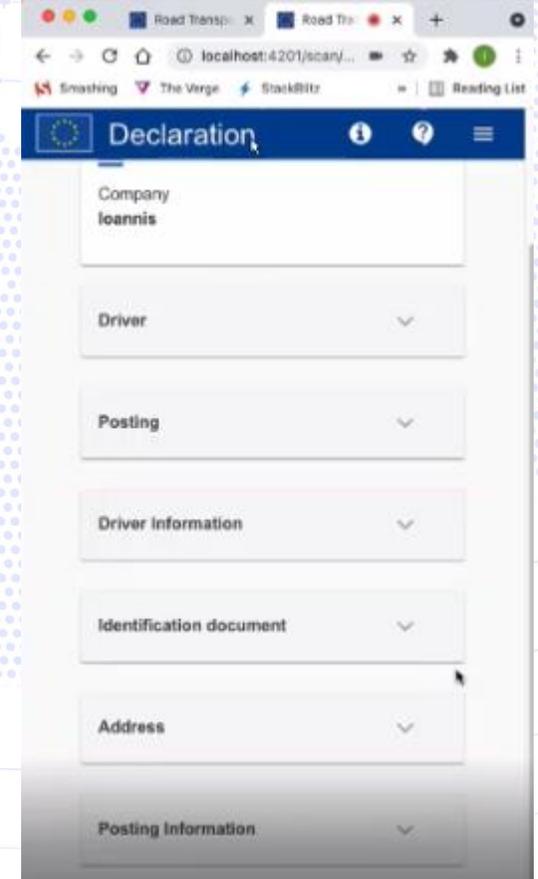
From now on, it is **not possible** to count **allowances** and lump sums as part of a driver's minimum salary. As a result drivers' remuneration will be fully taxed and burdened by social security contributions.



Changes in the declarations on the posting of drivers

The need to hire additional administrative staff to make hundreds of declarations via IMI system

Only one driver can be declared per declaration. If a driver is posted to several Member States, a separate driver posting declaration has to be sent to each Member State the driver is posted to (e.g. if a driver is posted to 3 different Member States, they will have to have 3 different declarations).



The screenshot shows a web browser window displaying the IMI Declaration form. The browser's address bar shows 'localhost:4201/scan/...'. The form has a blue header with the European Union flag and the word 'Declaration'. Below the header, there are several input fields and dropdown menus: 'Company' (with the value 'Ioannis'), 'Driver', 'Posting', 'Driver Information', 'Identification document', 'Address', and 'Posting Information'. Each field has a downward arrow indicating it is a dropdown menu.

Changes in cabotage

Limited access to market

A maximum of 3 cabotage operations in one country may be performed within a 7-day period.

After this period the truck may not enter this country for 4 days (so called cooling off period)



Changes in access to the profession (1)

Authorisation to pursue the occupation of road transport operator*

Having a **financial guarantee** of €1,800 for the first vehicle and €900 for each additional vehicle, and the cost of issuing a license.

Possession of **certificates of professional competence**, the number of which depends on the number of vehicles (1/50).

Complying with the requirements of '**good reputation**'



* The regulation is extended to light commercial vehicles between 2.5 and 3.5t

Changes in access to the profession (2)

Community licence*

The condition for issuing the document is to have a permit to pursue the occupation of road transport operator and an operational base.

The cost of issuing a document depends on its validity period.

* The regulation is extended to light commercial vehicles between 2.5 and 3.5t

WSPÓLNOTA EUROPEJSKA

PL⁽¹⁾

GŁÓWNY INSPEKTOR
TRANSPORTU DROGOWEGO

LICENCJA nr.....

dotycząca międzynarodowego zarobkowego przewozu drogowego rzeczy

Niniejsza licencja uprawnia⁽²⁾

do wykonywania międzynarodowego zarobkowego przewozu drogowego rzeczy na wszelkich trasach, dla przewozów lub części przewozów realizowanych zarobkowo na terytorium Wspólnoty, jak określono w rozporządzeniu Parlamentu Europejskiego i Rady (WE) nr 1072/2009 z dnia 21 października 2009 r. w sprawie wspólnych zasad dostępu do rynku międzynarodowych przewozów drogowych oraz zgodnie z postanowieniami ogólnymi niniejszej licencji.

Uwagi:

Niniejsza licencja jest ważna od do

Wydano w dnia

GŁÓWNY INSPEKTOR
TRANSPORTU DROGOWEGO
z up.⁽³⁾

Kierownik Sekcji w Biurze
do spraw Transportu Międzynarodowego

TL 0069127

(1) Znakami wyróżniającymi państw członkowskich są: (B) Belgia, (BG) Bułgaria, (CZ) Republika Czeska, (DK) Dania, (D) Niemcy, (EST) Estonia, (EU) Irlandia, (GR) Grecja, (E) Hiszpania, (F) Francja, (I) Włochy, (CY) Cypr, (LV) Łotwa, (LT) Litwa, (LU) Luksemburg, (M) Węgry, (MT) Malta, (NL) Niderlandy, (A) Austria, (PL) Polska, (P) Portugalia, (RO) Rumunia, (SLO) Słowenia, (SK) Słowacja, (FIN) Finlandia, (S) Szwecja, (UK) Zjednoczone Królestwo.
(2) Imię i nazwisko, nazwa lub firma oraz pełny adres przedsiębiorstwa.
(3) Podpis i pieczęć właściwego organu lub podmiotu wydającego licencje.

Changes in the transport infrastructure

Transport base requirement

Currently, according to the law, it is a place used for unloading, loading or dividing cargo.

In connection with the introduction of the Mobility Package, the possibility of **keeping 1/3 of the vehicles** in the carrier's fleet in such a place should be added to this definition. In addition, this place must be in a proper technical condition, which is to be regulated by construction law, and should be equipped with a **vehicle maintenance or repair** site.



Changes in transport operations

Return of vehicles to their base

Return of each vehicle to the company's operations centre in the country of establishment once **every 8 weeks**.

The regulation will limit carriers' **flexibility** and may generate **empty** kilometers



Business environment

Producer Price Index (PPI)

We are all experiencing high inflation as consumers.

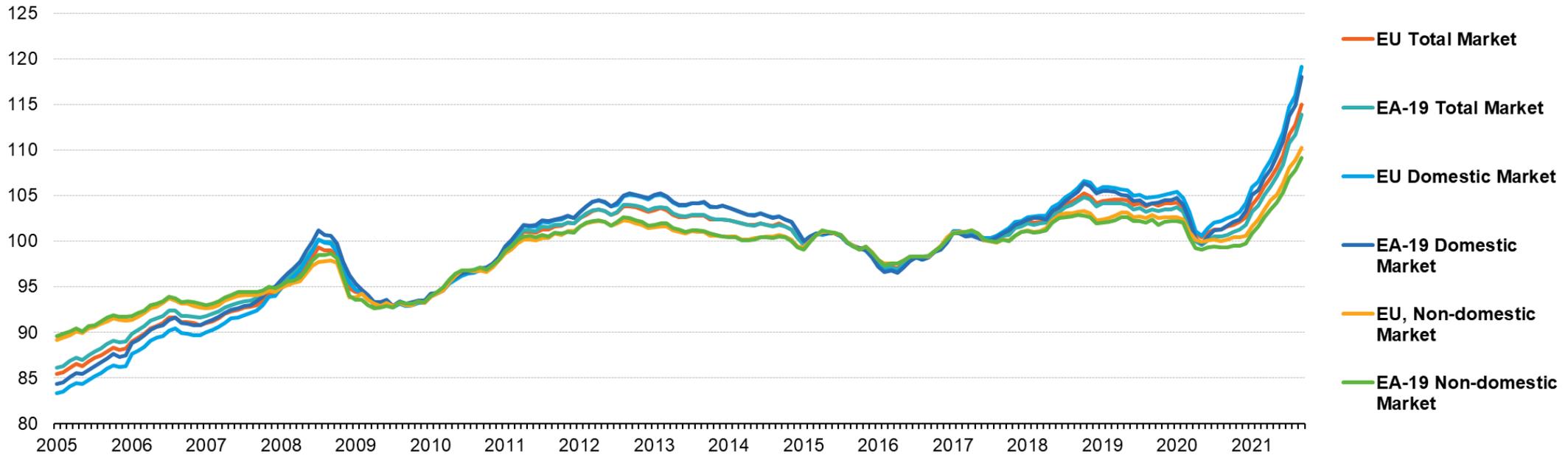
In the second half of 2021, so-called **producer inflation**, which shows an increase in the price of industrial production, started to rise.

For the transport industry, this means a **15% increase** in the price of new commercial vehicles.

Business environment

Producer Price Index (PPI)

EU, EA-19 Industrial producer prices, total, domestic and non-domestic market, 2005 - 2021, unadjusted data (2015 = 100)



Source: Eurostat (online data code: sts_inpp_m; sts_inppd_m; sts_inppnd_m)

eurostat 

Business environment – voice of experts

Higher equipment costs (purchase price and financing)

Trucking companies have also experienced growth in operating costs due to the current lack of vehicle resources. Truck manufacturers have struggled to produce enough trucks for road transportation providers globally, especially as there is a shortage of semiconductor chips that are crucial to various systems on trucks. This has resulted in rising prices for new, and subsequently used trucks, as manufacturers have struggled to finish enough vehicles to satisfy the needs of European road freight companies. Such a situation is putting upwards pressure on ownership costs for commercial vehicles.

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Business environment – voice of experts

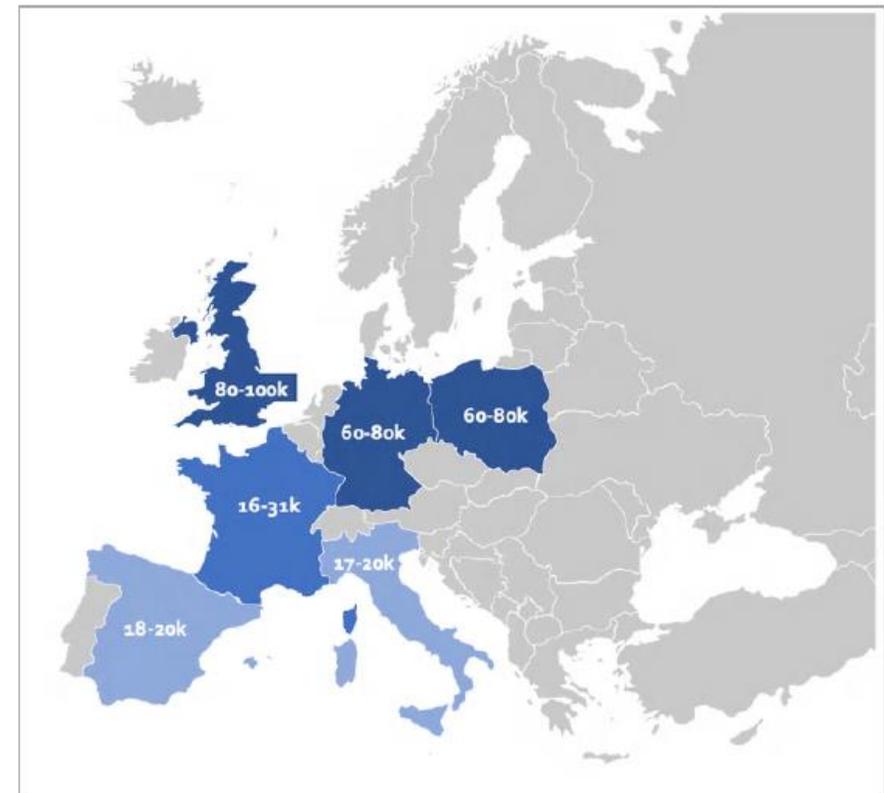
Driver shortage

Driver costs, which make up another third of carriers' operating costs, have also risen due to driver shortages. Many carriers have increased driver salaries several times over the year to remain competitive and attractive employers and to keep their trucks moving. Moreover, driver costs could rise even further in 2022, as some major rules for transport companies come into effect under the EU Mobility Package from 21 February 2022.

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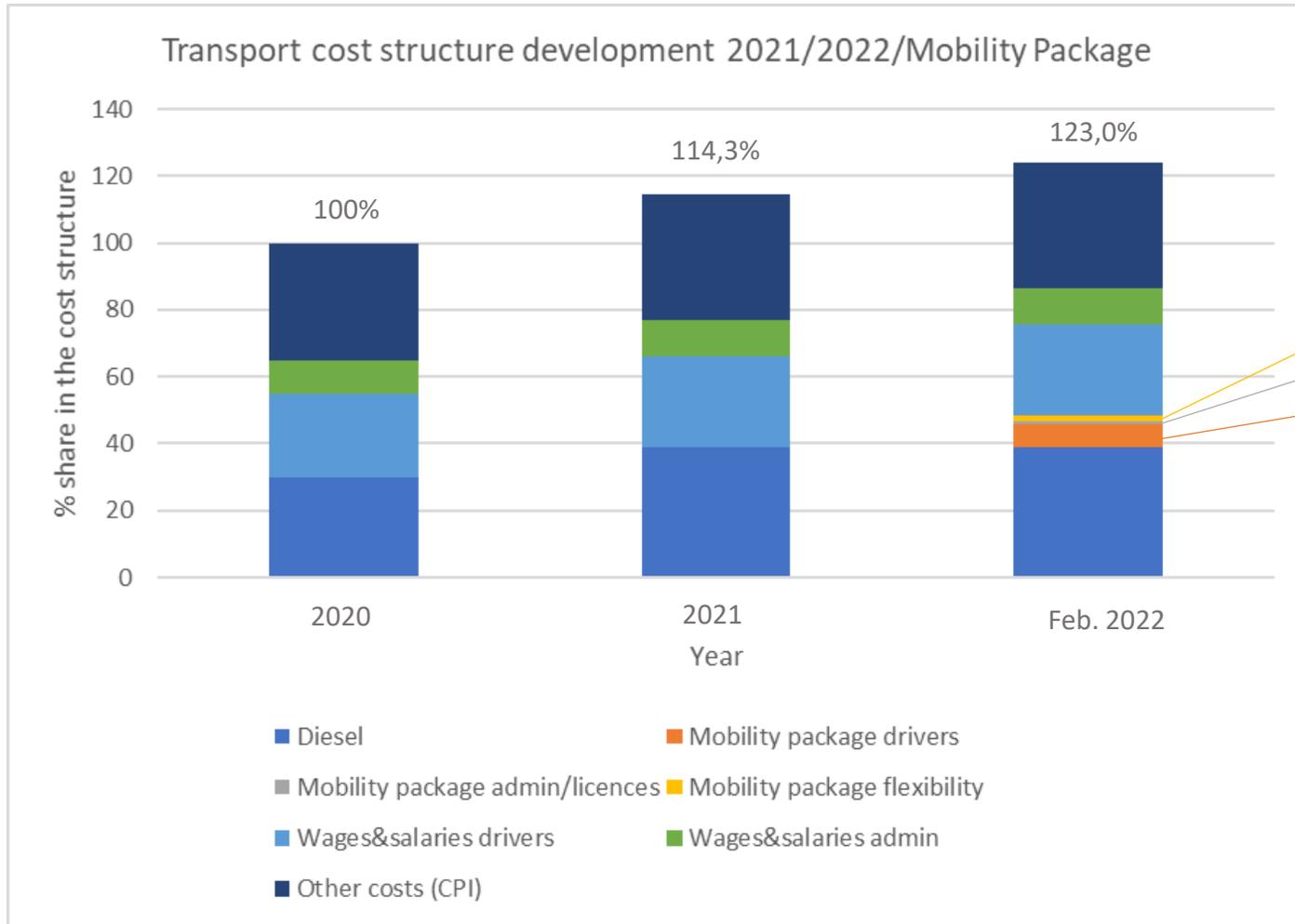


Truck driver shortage 2021 (thousands of drivers missing)



Source: IRU road freight transport associations, IRU analysis

Transport cost development 2020/2021/Feb 2022



Lower operational fleibility
Admin, licences, guarantees
Increased cost of drivers

Thank you