7TH WCTR
SYDNEY AUSTRALIA
1995

TOPIC 10
FREIGHT AND LOGISTICS

SMALL-SCALE TRANSPORT COMPANIES IN THE NORTH OF FRANCE: A SUCCESS OR A FAILURE

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Abstract

Evolutions in road goods transport concern small and medium sized companies and mainly transport groups. They dominate logistic services and transport of goods. Moreover they control areas in which they work either by setting up warehouses or creating networks of correspondents. The rule of small-scale transport companies is still the same. These transporters are dependent on other categories of transporters for getting freight.

INTRODUCTION

In France 80% of road transport companies employ less than 5 paid workers. Between 1980 and 1990, their number has very much increased: from 21,150 up to 28,550 of them. The conditions of the 1980's were favourable to the creation of road transport companies. Many helpful measures were taken: prices and access to transport market were liberalized, there were numerous inducements for the creation of transport companies by the lorry drivers. Nevertheless few changes in the structure of transport can be noticed in the last 10 years. Proportionally, in France in 1990, there are still as many small-scale companies as there used to be in 1980. This amazing stability shows the permanence of hierarchical relationships between the different transport actors. The transport groups and a few large companies (over 50 workers) rank at the top. They control the movements and develop their activities in other fields than transport (logistic services). The medium sized companies (10 to 50 workers), the small sized companies (less than 10 workers) and the small-scale companies are situated at the bottom of the hierarchy. They are confined to mere transport activity. Moreover, other actors are bound to come on the stage: the transport auxiliaries. They are intermediates between the contractors and the transporters. The activity of these freighters consists in dealing totally with the road haulage without carrying goods. Their telephones and their address books are their main working instruments.

The predominance of hierarchical relationships in road transport raises the problem of a possible evolution of small-scale transport companies. In 1995 independent transport is still alive owing to those small-scale companies (juridically independent companies whatever their size). The changes that have been observed in industrial companies and in the large transport don't seem to leave any room for small-scale companies. On the contrary the importance of haulage seems to decrease. Conveyance is no longer the prevailing activity in road transport. In such conditions, it would be interesting to have a closer look at the small-scale transport activities. The interest lies in the fact that the situations are very varied. In what conditions will it be possible for those small-scale transport companies to develop?

METHOD

To answer this question, the idea is to follow a group of small-scale companies in the district we are studying (Nord-Pas de Calais, in the North of France). Our starting point was 1989 when 210 creations of companies were registered. In 1990 we made an inquiry about only 94 of them, about half of them. Other companies were left out either because they couldn't be found or were secondary, or resulted from mergers and acquisitions. In 1992, another inquiry was made about 62 companies, nearly one third of the original sample. The others had either disappeared or did not answer our questionnaire. During both inquiries each manager was asked about how his company was run and what he thought about its future. Moreover, we had closer interviews with about 10 companies. They consisted of conversations on board the vehicles, then sharing a day's work.

The small-scale companies we inquired about in 1990 and 1992 are situated in the area Nord-Pas de Calais. In spite of recurrent crisis this district remains quite industrial and plays an important part in French economy. Moreover this region has undergone many changes in the last ten years: that is to say the building and the opening of new transport infrastructure such as the Channel Tunnel, the North European High Speed Train or TGV and motorways. This general economic activity has an impact on road goods transport within the area: these are among the most important in France. The traffic with the other French areas (close to the North area) is steadily increasing: Picardie, Haute Normandie, Ile de France, Champagne Ardennes (Figure 1). Nord-Pas de Calais is separated from Belgium by an official borderline (Figure 2). Belgium is well known for its industrial activity and especially for its ports: Antwerp ranks 2nd in Europe. The rate of road goods transports are considerably superior to the transports with other countries. So, such road transports can be considered as part of the regional activities.

The first part of this study deals with the closer interviews with the small-scale companies with a sample of four companies. In the second part, the results of the two inquiries of 1990 and 1992 are compared and analysed. In a third part, the changes observed will be explained in detail, and so will the main characteristics underlying the different evolutions of the companies in this sample.

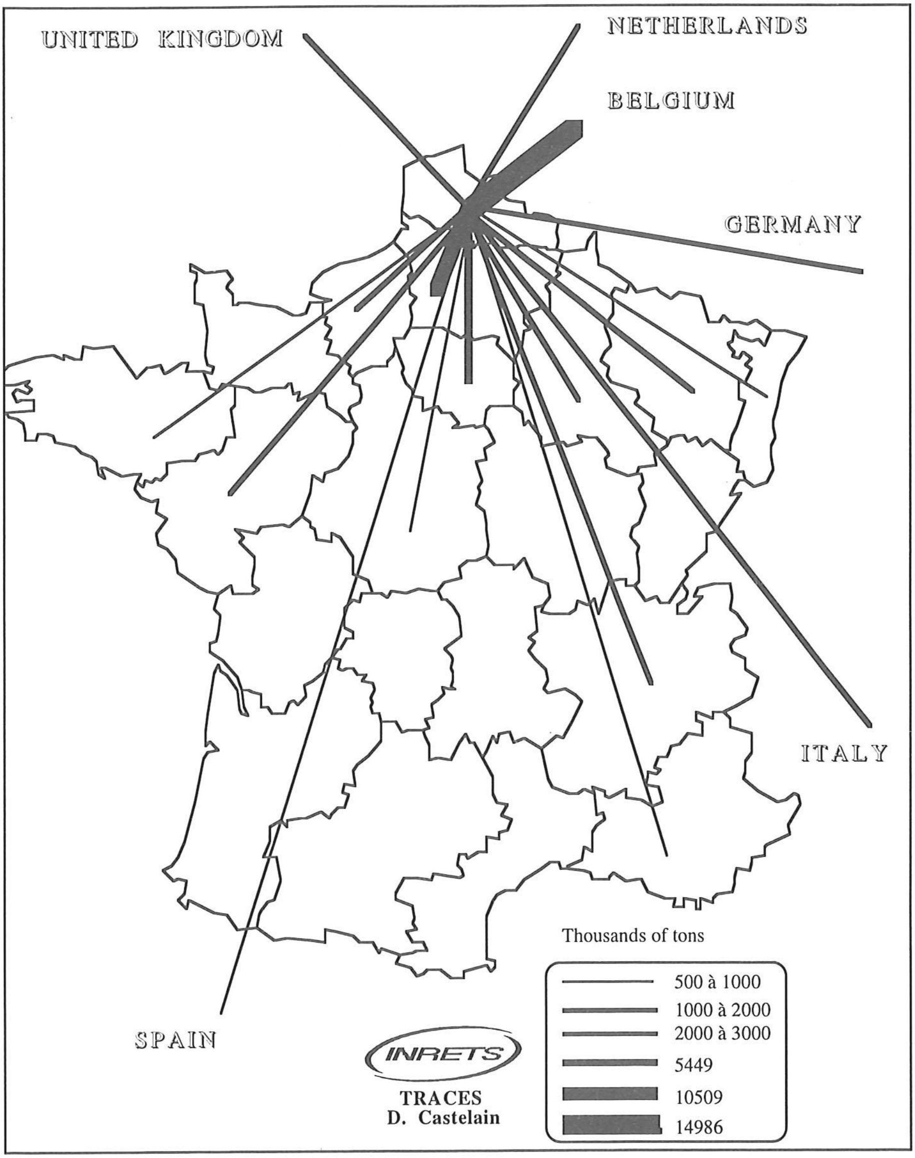

Figure 1 French and European road goods traffics in the north area, 1990

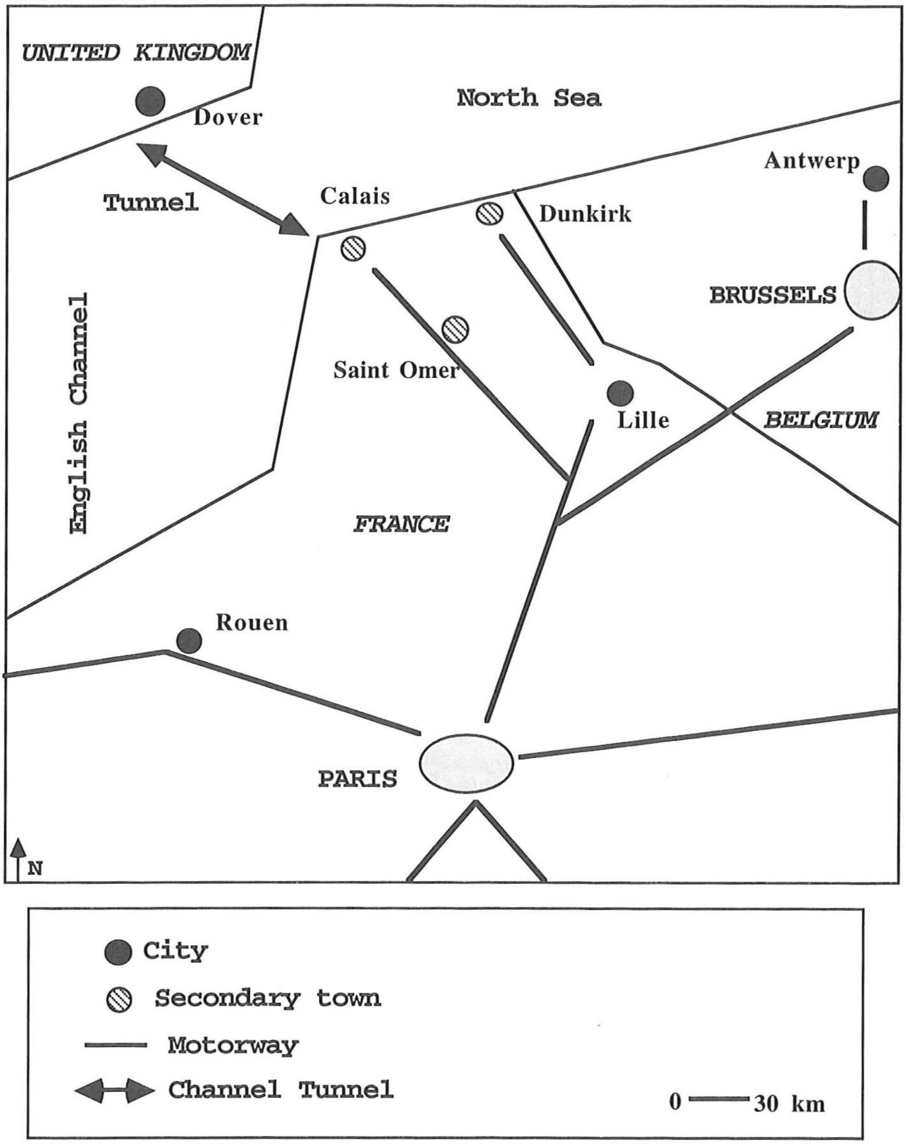

Figure 2 **The north of France and Belgium**

A SAMPLE OF SMALL-SCALE COMPANIES

The three out of four small-scale companies in this section have been chosen because they are typical: one or two paid drivers (the manager himself), one or two customers, a varied activity geographical area: either national (to Paris or the rest of France) or international (to Italy and Germany). Another company with nine paid workers and situated in the Lille district has been added.

Every day: Dunkirk-Paris and back

D. Moulart owns two tractors and two semi-trailers. He employs one paid driver. The company's main job consists in linking the North area to the Paris area (Figure 2). Both lorries are freighted by the same principal, a Belgian haulage contractor. Many times a week, the two semi-trailers carry metallurgic goods produced by a manufacturer in the North area and destined either to customers or to the manufacturer's Paris warehouses. On the way back, between Paris and Dunkirk, the lorries are often loaded with freight from the principal's warehouse. An agreement has been concluded with the principal with a guarantee of two years' work for the company lorries. Thus the manufacturer uses Moulart's lorries as shuttles linking his North manufacture and his Paris warehouses. He also uses them either in order to adjust his stocks and take back to Dunkirk the material or goods he needs for his production or for his deliveries. Though it has a direct contact with the manufacturer, in Dunkirk or in Paris, the small-scale company depends on the good-will of the principal. Thus, it is very difficult for him to escape the conditions imposed on him. The working days are very busy and the week-planning very heavy. Making new contacts in the world of transport in Dunkirk is very difficult for Moulart: he is away during all the week and has no time to canvass for new customers (with the idea of getting free from the present principal in the long run). The only contractor he knows is the Belgian one.

Driving to Italy

The Transexter company has been hauling semi-trailers to Italy. The company is situated near Saint Omer, 40 km from the Channel Tunnel (Figure 2). Transexter is freighted by a contractor owning a hundred lorries. Weekly, two semi-trailers belonging to the freighter are towed. When they leave the North of France they are filled with the production from an important manufacturer: Verrerie Cristallerie d'Arques (VCA) ranking first in the world for glass and crystal. The company also transports the products of another local manufacturer, a specialist in tinned vegetables: Bonduelle. On the way back from Italy the principal manages to find trailers for both tractors.

The markets seem safe. Both freighters companies are developing. VCA is exporting in Europe and leaves the transport to professionals. Bonduelle's production organisation is scattered in different European countries, Italy among them. When going as well as coming back, the exchanges between the different Bonduelle's branches allow the transport companies to have freight regularly. Moreover the way transports are organized around Saint Omer gives every local transport company a chance to work. Three or four medium sized companies are in direct relationship with manufacturers. Then, part of the freight is subcontracted between different small transport companies. Obviously they are dependant on the principal: he supplies it with trailers, pays a monthly fixed price, organises the cartage back from Italy. The fact the manager of Transexter is inserted in the local background of transport is a pledge of steady activity for the company, to and fro. The manager belongs to the world of transport: his father runs a transport company, that is a customer of local contractors and of VCA and Bonduelle. The manager may think about developing Transexter: the principal agreed for them to have a second lorry. The wish of the manager is to keep his company as it is now, and carry on working with the same principal.

Transporting heavy freight in Europe

The TRD company employs two persons, the manager is among them. It owns one tractor and trailer and one lorry. 40% of their activity covers France (occasionally the North area) and 60% the EEC. The products they transport are general goods: furniture, papers rolls, tins, carpets which is in fact their speciality (heavy freight transport). The manager gives preference to international traffic and spends much time getting the numerous and different permits. TRD is working directly with freighters and with transport contractors. They have some customers locally, some others in nearby Picardie. 50% of their turnover rests upon one freighter, but some others are important too. So TRD stops to load in Germany and Great Britain on the way back. In the meantime, the manager who has had some experience as a building constructor is cautious about hiring workers (eventually 3 of them are to be hired).

A parcel transport company in Lille

Messatrans is a parcel transport company employing nine paid workers. They own three lorries, two tractors and two trailers. Nearly the whole of their activities is in the inner Lille. The remaining 10% is composed of international traffic with Germany, and inner traffic to Eastern France. Messatrans makes 90% of their turnover on rapid transport of freight over 250 kg, and the other 10% on diversified freight carried in semi-trailers. In addition to these parcel transport activities they also hire vehicles without drivers. And even, from time to time, the manager hires himself as a driver (without vehicles) to his freighter. This solution has the advantage of being well paid. Messatrans is working with different freighters in the district: ten of them, regular customers among them there are two important freighters. Thus it can be considered as a subcontractor. They make 20% of their turnover on their main customer. Messatrans asks either a day charge or a time charge for the transport in the Lille district. Messatrans has grown regularly and steadily since 1990: they hired two workers and bought vehicles. Moreover they have moved from the manager's place to new premises in the same district. They have invested in the development of the company and in different fields. They have diversified their activities even if parcel transporting remains predominant. As far as parcel transport is concerned, competition is very hard, but Messatrans is quite an independent company with a well balanced development.

As a conclusion

The four companies we studied have some characteristics in common. Their activity is linked to their relationship with the principals. In two companies they have very narrow margins of action or even no margin at all (Moulart, Transexter). We should not be lured by juridical independence: actually the small-scale companies are sham paid workers and the principals use them. In the other two companies (TRD, Messatrans), a development seems possible. The relation of inter-dependence is clearly underlined in the four examples we have studied. The small-scale companies can't exist without the principals. But the latter also need these small-scale companies if they want to develop. According to the different conditions the small-scale companies may be dominated by the principals or they may have the opportunity to develop. This will be the matter of the next two sections.

FROM 1990 TO 1992: A FLASH ON THE SMALL-SCALE COMPANIES

Firstly, we are going to present the results of our inquiries of 1990 and 1992. In order to compare efficiently the results of both inquiries and follow the development of companies, we worked from 62 companies still active in 1992.

Still dependant

The dependence on principals has been evaluated as follows. Exclusive dependence means that 90% of the company's turnover is obtained with one customer only—the principal. When between 50 and 90% of the turnover is obtained with this same customer, the dependence may be considered a strong dependence. If no customer reaches 50% of the turnover, the dependence will be slight. A relative dependence means there are numerous customers: the three companies we are dealing with are in fact principals, transport contractors or freighters. If we consider Table 1, no matter the year, exclusive or strong dependence is predominant in the sample: 51 companies in 1990 (82%), 48 companies in 1992 (77%). As time goes by, small-scale companies remain dependant on one customer representing 50% of the turnover. Moulart's company is representative of this exclusive dependence on principals. However in 1990 as well as in 1992, nine companies (15%) make their turnover on several customers (<50%). Even more 16% of the companies that were dependant in 1990 for over 50% have lessened such dependence (26%, in dark grey on Table 1). Therefore it is possible for the small-scale companies to canvass for more customers and become economically independent. Only three companies become more dependant between the two inquiries. They seem to be against the stream of the general tendency.

Table 1 **Classification of the companies in the sample according to their dependence on the principals, 1990 and 1992**

1990 / 1992	Exclusive dependence	Strong dependence	Slight dependence	Relative dependence	Total
Exclusive dependence	22	1	0	0	23
Strong dependence	11	12	2	0	25
Slight dependence	2	3	6	0	11
Relative dependence	0	0	0	3	3
Total	36	15	8	3	62

Getting freight with subcontracts

In the sample of small-scale companies we have chosen, in 1990 70% of these companies have among their customers either a transport contractor or a freighter. In 1992 they are 63%. Subcontracting seems to be the main way of getting freight. Here again the progression is low: the small-scale companies are very strongly dependent on other transport companies. However getting freight directly from the manufacturers is also possible for the small-scale companies: 29% in 1990, 35% in 1992. The interesting point is that, in most companies, freight is shared between manufacturers and freighters: 13 companies that subcontracted for freight in 1990 can get it in 1992 without any intermediate (dark grey on Table 2). The progression is obvious as if the small-scale companies wished to get rid of the intermediate agents. The TRD company is representative of such a tendency. On the contrary in 1992 four companies of the sample subcontracted for their freight, whereas they did not in 1990.

Table 2 **Classification of the companies in the sample according to the means of getting freight, 1990 and 1992**

1990 / 1992	Subcontracting	Subcontracting and without intermediate	Without intermediate	?	Total
Subcontracting	20	1	1	-	22 (35%)
Subcontracting and without intermediate	12	3	2	-	17 (28%)
Without intermediate	1	5	15	1	22 (35%)
?	1	-	-	-	1 (2%)
Total	34 (55%)	9 (14%)	18 (29%)	1 (2%)	62 (100%)

Does subcontracting lead to closing down?

Between 1990 and 1992, 21% of the companies of our sample disappeared (20 out of 94). Practically the reasons for closing down are different according to the companies. In a first case closing down is the result of the company being reorganized in order to go somewhere else. Obviously such companies are not small-scale companies but freighters or forwarding agents. In a second case they closed down deliberately because the company was a failure financially or could not get valuable contracts. In a third case, closing down is directly linked to the way of getting freight. Ten companies were in 1990 exclusively dependant on the principals, and six strongly dependant. Practically the principal who has financial problems does not pay the subcontractors. These can't cope with such financial situation, can't find other customers and close down. Very often the company disappears. Moulart's company, we studied before, has closed down. As it was exclusively dependant on a transport contractor it suffered from the difficulties he met. In the first 1990 inquiry D. Moulart said the principal did not respect his contracts and did not pay. In 1992 in the second interview he said his company had closed down because of too many unpaid bills. So to say, the former manager of D. Moulart who pushed him to create his company contributed to its death.

Little hiring

Among the companies of the sample that have not closed down, most of them have kept the same number of workers between 1990 and 1992: this is true for 37 companies (60%). Companies, with only one driver, still represent in 1992 84% of these 37 (36% for employing companies). For these new companies with a slight possibility of development, it means having a steady activity, longer working hours, but not hiring new workers. In 1992 43 new jobs have been created in 22 companies (36% of the sample). 22 new jobs are concentrated in three companies. The other 21, in different companies (one or two jobs per company). These jobs are driving jobs, most of the time: consequently as the number of cars is increasing, freight has to be found for the extra lorry. Such is the dilemma of the small-scale companies: they have to make sure they have enough regular freight for all the vehicles and the drivers. Otherwise they will have to suppress this new job and sell the material. Sometimes having new customers don't affect this dependence: in fact there is one customer per vehicle and per driver.

One company out of two keeps the same customer

Does hiring mean there are more customers? Actually a clear distinction must be made between an increasing activity due to a more important freight, and the increase of the customers supplying freight but irregularly. In the sample (Table 3), 56% of the contractors have kept the same number of customers over two years. 37% still have only one in 1992. Such percentages show the impossibility for most companies to canvass for new customers. There is much competition and they appreciate keeping the contracts they had when they started their activity. 34% of the transport companies, in the same sample, have doubled or even tripled the number of their customers in the same period (dark grey in Table 3). The 2-4 and 10 customers categories have increased from 19% to 29% and from 5 to 14,5%. But there is no significant connection between the hiring of new drivers and the increasing number of customers. Some small-scale companies have hired new drivers because they had more customers, the others because they got more regular freight. The last ones did not hire anybody while they had an increasing number of customers. The four companies we chose are quite representative. In two of these companies (Moulart, Transexter) the number of customers has kept the same in the last two years: yet one new job was created to keep up with the freight offer. In the other two (TRD, Messatrans) there was a wider range of customers, thus jobs were created. Finally in all cases, the difficult task for these companies is to get enough freight for all their vehicles.

Table 3 Classification of the companies in the sample according to number of customers, 1990 and 1992

1990 / 1992	1 customer	2-4 customers	5-9 customers	+10 customers	?	Total
1 customer	23	0	0	0	0	23
2-4 customers	9	6	2	0	1	18
5-9 customers	2	3	4	0	1	10
+10 customers	1	3	3	2	0	9
?	0	0	1	1	0	2
Total	35	12	10	3	2	62

Local and international markets

Analysing the turnover enabled us to measure the different activity areas of the small-scale companies. During our inquiries the manager was asked to specify the part of each area in their turnover: local (ie limited to the Nord-Pas de Calais area), national (ie France), international (the other European countries). The exclusive traffic means that more than 90% of the activity deals with local, national or international areas. Dominant traffic means a strong activity between 50 and 90%. Weak traffic means that 10 to 50% of the turnover is done in a precise area. No traffic implies the company does not work in a studied area. Obviously the local contracts are prevailing: 53% of the companies of our sample get more than half of their turnover on local traffic. 34% of the companies get over 50% of their turnover on international traffic. Only 6% of the transport contractors get the same result with national traffic: the small-scale companies are kept out from such traffics.

The contractors concerned with local traffic have their principals nearby, and they load and unload locally. Usually there is not more than 100 km, rarely 200 km, between such places. This type of transport is prevailing in France. The dump lorry transport are the first market of our sample: for instance transporting rubble or material to building sites, or farming products to be transformed. This type of transport makes it all the more easy for former drivers, workers or the sons of farmers to enter the transport business. The markets are near and distances not too long. They can work round their living places at a few hours' distance. Nevertheless working days are very busy. Even if they live near there is no possible comparison with the working hours of an ordinary wage-earner. However between the two inquiries, international markets have been increasing. In 1990 18 small-scale companies have either weak or dominant traffic: in 1992 they are now 30. The different countries are Belgium, Germany, Great Britain, Italy, the Netherlands and Scandinavia. Transports are all through the week on distances of thousands of kilometres. This "Touring of Europe" illustrates the myth of the independent driver. But they must work long hours and pay high fees (petrol, tolls, food).

Drawing conclusions

In order to illustrate clearly these dependant relations, we are going to show the way the contracts dealing with building the Channel Tunnel were obtained and who were the different actors. This example will show the expected domination of big transport companies as well as the part played by small-scale companies in the final stage. Building the Channel Tunnel lasted seven years from 1987 to 1993. It has created numerous markets: transporting the building material, transporting the equipment for the tunnel. This raises two mains questions: what category of transport contractors worked on the building site? Was there any room left for the small-scale companies? As expected the local and national big transport contractors obtained nearly all the contracts. As usual, the consortium of builders TML (TransManche Link) called for tenders such companies that were used to big markets for a long period of time, with thousands of vehicles, and a large network of subcontractors. Concerning the material for building the tunnel, two transport companies, subsidiary to important engineering groups, obtained most contracts. Concerning equipment, many local companies of over ten workers were also called for. Locally small-scale companies subcontracted for the transport of building material. Dump lorry transport is usual for such companies whereas they could not get the markets for equipment transport. They were many new companies created for the Channel Tunnel works. The studies point out clearly, that in the district of Calais (on the French side of the tunnel) the creation of companies has increased from 1986 to 1990 (Jouveneaux 1994). The end of the works was very hard for such companies. The transport supply was more important than the offer prices went down. Part of the small-scale companies born with the Tunnel died when the works stopped. In some cases the "After the Tunnel" period was prepared and negotiated. In other cases the small-scale companies could not find any solution.

The main characteristics of small-scale companies shown through different examples and long run observations are as follows: a strong dependence, prevailing subcontracting, only one driver, one or two customers and local market. Business is very steady with no progression. This type of company can't develop easily. Actually the so-called independent transport is faced with different even dramatic conditions.

SUCCESS OR FAILURE: SOME EXPLANATIONS

With time, companies have a different type of evolution. The inquiries underline either the go-ahead spirit (or the lack of it) of some small-scale companies, the success or the failure of their management, as well as the successful integration of managers in the transport world.

Managers still drive

The managers of small-scale companies come mostly from "the road", they are former drivers: 55% of the sample. Basically the work has not changed: they drive as they used to do. Their driving experience is their only advantage. They can rapidly find contracts, generally with their former company. Many a company, to cut down the cost, prefers to dismiss its drivers, and encourages them to set up their own business, buy the vehicles at an attractive price, and lures them about a possible development and a growing turnover. Thoenig and Dupuy (1982) consider this as a means of regulating road transport. But to run their own business, however small, qualifications are needed, to keep the accounts or obtain certificates. Usually they rarely have such qualifications. The principal does not guarantee contracts all the year round. The small-scale companies don't know what will become of tomorrow. For local transport, very often they tell the contractor the day before: he must be very flexible and ready to answer the offers, otherwise he may lose the market. His work is always the same, but there is nothing sure about getting freight daily or weekly. Obviously getting information means getting freight. But small-scale companies are dependant on the freighter who knows about the flow of goods, their places and the available freight. He himself knows very little about it. To develop his company, he will constantly be faced with the problem of transforming information into a good knowledge of the market. Here we come to the critical problem of small-scale companies: what about the training of the manager of small-scale companies? What about his experience in transport? What about his contacts with this world? If these questions have a positive answer the small-scale companies future will be changed.

Insertion in the transport world

Such interdependence is typical of road goods transport. The small-scale companies is not isolated but surrounded by many: it may be either a relative, formerly in transport, his former boss who is now his freighter and "adviser", a banker or a representative of lorry building. Two elements are essential for a small-scale company manager to work it out: his socio-economical background, and his network of acquaintances. The most spectacular progression of our sample happened in companies whose manager is not a former driver. On the contrary the contractors are former executives from transport companies and mostly former independent workers: farmers, wholesalers and even building contractors. At the beginning they chose a "SARL" status for their company, separating their private property from the company's property. Owing to their former jobs, they have kept in touch with freighters and sometimes even had their own vehicles . The first contract for their company is therefore easily found: they transport for cooperative stores or for building companies. They are situated at a crossroads of different activities: commerce, industry or building on one side, transport on the other. Running a transport company for a former driver is by no way a disadvantage. The small-scale company manager uses the contacts he made with freighters or with manufacturers, when he used to be a driver and meet them daily when loading. As a manager he canvasses for such customers hoping he will get freight directly and not through an intermediate. This is not an easy job. First he needs free time, second, as he depends on his freighter, he must be cautious about his contacts. Everything gets known in the world of transport, and it is very difficult to act with discretion as the small-scale company manager is under domination. We will now see to what extent knowledge may be useful to develop a small-scale company.

Belgian nearby markets

There is little change in the areas of the small-scale companies' activity. Companies are tied to a market, to a place. They can't get away from it. The rules forbid them to: it is not possible for them to change their local activity into an international one without permit. Very often the freighter himself, when he wishes to subcontract transport, asks for permit. Thus, he is the one who runs the small-scale company because he has a good knowledge of the market and can catch the opportunities owing to a large range of subcontractors. As international contracts become more numerous, so are the customers, so they become less dependant on principals. In our sample, Belgium ranks first among the international markets. Especially in the companies that have left the category "exclusive dependence" for the category "strong dependence" (with a predominating customer but not only one). It consists in progressively entering such markets as they are more profitable. The company diversifies its markets and works on both local traffic and nearby Belgian traffic. Such diversity together with the widening of geographical activity areas results from the progressive insertion of road carriers in the world of road goods transport. New contacts, meeting new people create new contracts.

Freight on the return journey: an essential condition

A network of acquaintances becomes necessary when the small-scale company tries to get freight on the way back. Actually, making the activity progress does not mean developing only the markets on the outward journey, they must be regular on the return journey. This is true when the small-scale company has delivered in the South of France, or in a foreign country where they have neither correspondent nor freighter. When the freight is not supplied by a correspondent or a freighter, they have to appeal to freight exchange (in France only) which is not very satisfactory on the whole: little freight, small parcels, low prices, and they have to travel empty on long distances to reach the loading places. As dependence is becoming less important, the means of getting freight for the return journey become more diversified (Table 4). It is obvious that the development of the small-scale company's activity means there is freight on the return journey and they have won the loyalty of new customers necessary to the company (for instance in the unloading country). Analysing the sample shows that, among the exclusively dependant companies, the possibility of freight on the return journey is decided by the freighter, two times out of three. However the company is not sure to travel full.

Table 4 Classification of the companies in the sample according to their dependence on the freighter and the means of getting freight on the return journey, 1992

1992	Exclusive dependence	Strong dependence	Slight dependence	Relative dependence	Total
No freight for the way back	7	7	5	1	20
First freighter	16	6	1	1	24
Consignee	0	1	0	0	1
Regular customer in the unloading country	0	3	4	1	8
Freight exchange	0	7	0	0	7
Other carriers	0	1	0	0	1
?	0	0	1	0	1
Total	23	25	11	3	62

There remains a paradox among the exclusively dependant companies with growing development. Such is the case of the companies whose freighter gives a written guarantee of freight on the return journey (for instance the Transexter company we studied). Development is thus possible and the company can hire new drivers. During the inquiries these managers told us they were conscious that a total dependence of all the vehicles was very dangerous when there was only one principal. However some are happy with this situation and the turnover is increasing. A growing activity is directly related to the contracts with the freighters. Both development and dependence seem possible. Yet there are some underlying questions that can't be answered now: what about prices? Does a guarantee or freight imply long working hours? Can the freighter break the contract, and if so, what recourse is possible for the company?

CONCLUSION

Dependence on the one hand, insertion in the transport world allowing the company to develop on the other hand. Apparently these two types of relation are opposed, yet they illustrate two aspects of a same question: what is the position and the evolution of small-scale transport companies in the system of the road goods transport in France? Among the small-scale companies we can't say there are two categories: the exploited ones and the developing ones. They show different faces according to their social origin, their training, their experience in transport, their dynamism and their luck. The evolution of the company is related to the manager's qualities, but also to his relationships with the other carriers and freighters.

What was illustrated about the North of France could apply to other French areas. In Auvergne, the center of France, subcontracting in transport has been studied (Bossin and Patier-Marque 1992). An inquiry of a sample of local companies shows the same permanence of hierarchical relations and the same dependence. In neighbouring countries such as Belgium, Great Britain, Italy or Spain, the small-scale transport companies seem to be prevailing in the network of road transport (Bossin and Patier-Marque 1992, Bologna 1993, Castelain and Lombard 1994).

Deeper studies about the relationships between the different actors go beyond statistical results. For instance in Italy, in the district of Carrare, where the famous marble is extracted, transported and sent all round the world, Marotel (1994) shows that the transport bound of Italy or Europe is dominated by the forwarding agents from Carrare, or from foreign countries. Locally the marble carriers run the market consisting in taking the marble down from the mountain to the plain, the ports or the workshops. The situation is different for long-distance transports. Such comparison between the North of France and Carrare could be developed. Proximity, in both cases, is the basis of small-scale companies. The different notions of local background, network of acquaintances, hierarchical relations can be found.

ACKNOWLEDGMENTS

The author thanks M. Pascal Mauny (CNRS-IFRESI) and M. Patrick Nierat (INRETS) for having read and criticized my communication, and Mrs Marie-Françoise Fritsch for having translating this paper.

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