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IMPACT OF THE DEFICIT OF PROFESSIONAL DRIVERS ON THE DEVELOPMENT OF TRANSPORT ENTERPRISES FROM RURAL AREAS OF THE WEST POMERANIAN PROVINCE

Key words: job market, deficit of drivers, compensation, bulk road transport, rural territories

ABSTRACT. The aim of the article is to present and evaluate the effects of the deficit of professional drivers and changes in remuneration on the activities and development opportunities of road freight transport enterprises from rural areas of Western Pomerania. To achieve this objective, literature analysis, comparative analysis and elements of descriptive statistics were used. The research material was constituted by data for 58 transport enterprises registered in rural areas of the West Pomeranian Province. Financial and employment data was obtained from financial statements and InfoVeriti and Bisnode Polska databases. In the complimentary research, qualitative data was obtained through the use of CAWI and CAPI survey methods. Changes in the employment volume of the surveyed entities and the amount of remuneration paid by them in 2008-2017 were examined and evaluated. The results obtained indicate that both employment and remuneration as well as other benefits paid to drivers increased in the period under consideration. Enterprises from urban and rural areas pointed out serious problems in recruiting employees. On the basis of the study, the effects of the driver deficit on enterprises were also determined. Among them were: difficulties in finding employees, rising labour costs, employment turnover, incomplete use of transport means and difficulties in the timely performance of contracts. In the opinion of the surveyed enterprises, personnel problems were caused by factors such as a decrease in the number of people with appropriate qualifications on the labour market, emigration for financial purposes and high competition among employers

INTRODUCTION

Among micro, small and medium companies (MSAC) of Poland, the entrepreneurship of road transport takes a significant place. This sector has been increasing since 2004 together with its importance for the economy. This is evidenced by the value of sold production, share in generated GDP and employment. In 2017, this branch generated PLN 120 billion, which accounted for 5.8% of GDP. According to GUS [2019] data, in the road transport sector, average employment based on full-time employment in 2017 was 299.2 thousand people (62% employed in transport in total). In 2017, Polish road transport carried 85.1% of total freight expressed in tonnes and 80.2% of total freight transport in tonne-kilometres.

In 2004-2017, the activity of entities involved in road freight transport, calculated in tonne-kilometres increased by over 80%, and the share of international transport carried out on international routes and between Poland and other countries increased from 24.5% to 41.6%. This contributed to a reinforcement of Poland's strong position as one of the leaders of this sector in the European Union [PwC 2016].

In 2017, Polish transport companies performed 17.5% of transport work carried out in the European Union, taking first place among the EU-28 (ahead of Germany and Spain). With regards to only international transport, Poland's participation was even higher (30.7%), ensuring leader position ahead of Germany and Spain. International road transport constitutes more than half of overall transport performance as part of Polish transport [GUS 2018].

This sector gained such a strong market position and increased significance for the Polish economy as a result of Poland's beneficial location in Central Europe. Another factor of this position is the effective expansion of Polish entrepreneurs into European markets together with felicitous cargo rates, adequate quality and service timeliness. Intensification of exchange in trafficking between Poland and other European countries [Lorenc 2018] contributed as well.

This dynamic development of the Polish road freight transport sector has, for some time, been limited by an insufficient number of professional drivers (especially in international transport), which contributes to wage increases and employee turnover. All international freight transport carriers, including West Pomeranian-based transport companies located in rural areas, face this problem.

The aim of the study was to assess the impact of a lack of drivers and changes in remuneration on the functioning and development of MSMEs in the road transport sector based in rural areas of the West Pomeranian Province.

SELECTED THEORETICAL ISSUES OF THE LABOUR MARKET OF POLISH PROFESSIONAL DRIVERS

One of the most significant determinants impacting the dynamic development and foreign expansion of Polish road transport were labour costs. An increase in share in the European transport market and high competitiveness meant that, from 2015, in EU countries (especially developed ones), the concept of "social dumping" began to be used in relation to the way Polish carriers operate [Bielecki 2017]. Polish road transport companies, applying lower wages and different employment standards, offered more attractive prices and ousted competitors from developed countries from the transport market, using the so-called sabotage rules [EULER 2014]. The use of this asset was possible due to the situation on the Polish labour market. With high unemployment rates and low wages in other sectors, wages offered to drivers were attractive. Furthermore, in accordance with the Act of 16 April 2004 on the working time of drivers [Journal of Laws, 20104.92.879] and administrative court rulings, drivers were entitled to reimbursements of business travel expenses in the form of subsistence allowances and accommodation lump sums in addition to the base salary. Companies did not have to charge or pay income tax or social security or health insurance contributions from these components. In fact, this raised the amount of work funding received by drivers, which also allowed enterprises to obtain lower costs. Salaries and allowances were so attractive that they allured both Polish and Eastern European drivers to work in international freight transport.

Along with the dynamic development of the road transport sector, in 2008-2017, and the improvement of the economic situation in Poland, the labour market saw a great demand for professional drivers, significantly exceeding supply. The dynamics of transport growth exceeded the pace of transport means and employment growth. This contributed to increasing the efficiency of vehicle use and the intensity of driver labour. This situation gave rise to an employee market in the sector. Research conducted in 2017 by Sławomir Dorosiewicz and Iwona Balke [2018] showed that 51.7% of surveyed enterprises had problems finding drivers. This was considered the second most important limitation of transport activity and development opportunities, following excessively high costs.

The report of the Polish Institute of Road Transport (PITD) confirms that one of the most frequently mentioned barriers of continuous development of this sector in Poland is lack of professional drivers. Whereas, the deficit estimates around 100 thousand workers [PITD 2018, PITD 2019]. The same problem was pointed out by surveys made by experts from the consulting company PwC. It estimates that around 20% of drivers is missing to ensure the full service for companies offering transport. The deficit increases because of annual leave of about 25 thousand drivers, despite initial qualifications being gained by about 35 thousand throughout a year [PwC 2016].

Research on this problem in EU countries [TÜV Rheinland 2012, Moloney 2012, EC 2017, Werk.nl 2018] indicates that the occurrence of a driver deficit is influenced by factors such as demographic changes, a growing demand for freight, the perception of the profession as not very prestigious, a remuneration amount lower than in other sectors, poor working conditions and high training costs.

MATERIAL AND METHODS

The results of the survey carried out were achieved by an analysis of primary and secondary data. The choice of companies had a purposeful character and was conducted to meet geographic criteria based on the headquarters of given entities in the area of the West Pomeranian Voivodship with an international license in road freight transport. Data on the financial statements were downloaded from the InfoVeriti database. The time frame of the study was 2008-2017. A list of enterprises that met the selection criteria in the form of the following conditions was generated from the received database:
- based in the West Pomeranian Province,
- during the audited period conducted business activity in the field of international road freight transport for a period of at least 5 years,
- they functioned continuously in the years 2008-2017,
- they submitted financial statements for all years of the audited period.

The final result was a research group comprising 705 enterprises. These enterprises constituted 37.6% of all units with a transport license in 2017 registered in the West Po-

Table 1. The number of analyzed enterprises by size class in the years 2008-2017

Specification	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Micro	22	18	12	13	14	17	18	19	20	19
Small	32	36	42	41	40	36	35	34	32	33
Medium	4	4	4	4	4	5	5	5	6	6
Total	58	58	58	58	58	58	58	58	58	58

Source: own study based on the results of the study

meranian Province, belonging to the MSME sector (based on the number of employees), which was verified on the basis of data from the Bisnode Polska and InfoVeriti databases.

In the complementary study, qualitative data was obtained through the use of CAWI and CAPI survey methods, addressed to business owners, transport managers and senior management. For 184 units, both financial data from the reports and qualitative data collected on the basis of the survey were obtained. 58 entities were indicated from this group, which operated in the rural and urban-rural communes of the region (with the exception of cities), constituting the research material used in the article. The detailed characteristics of the surveyed entities are presented in Table 1. Data obtained for the remaining 126 enterprises based in urban areas were used as comparative material to reference the results of the main study.

SURVEY RESULTS

Employment is one of the basic quantative parameters of growth for companies. In the surveyed group of enterprises, between the years 2008-2017, high dynamics of growth of the amount of employed people as well as of wages took place. In 2008, tested entities from the rural areas of the West Pomeranian Voivodship employed 797 people, whereas in year 2017 this number rose to 1365 (growth by 568 people – 71.27%). In the meantime, in companies located in urban areas, the number of employed people grew by 66.85% (from 1668 in 2008 to 2783 in 2017). Employment in the analyzed group of entities increased to the greatest extent in the case of medium-sized and micro-enterprises.

In 2017, the largest number of employees in the study group was observed in enterprises from the following counties: Stargard county (12.6%), Myślibórz county (9.9%) and Gryfino county (9.4%). The lowest employment was in: Sławno (2.6%) and Koszalin county (3.1%). During the surveyed period, a growth in the average number of employed took place. In the group of tested small companies, in 2008, medial employment added up to 14.1 persons, whereas in year 2017 – 21.8 persons. In the case of medium companies, this indicator between the years 2008-2017 rose from 75.0 to 96.7 persons in 2017. Entities which fell into the category of micro companies employed on average 2.8 persons during the surveyed period. Average employment increased by 2 persons in the analyzed years. The number of persons employed on average in micro and small enterprises was, until 2016, lower than in the case of transport entities based in cities and SMEs of transport companies in Poland and

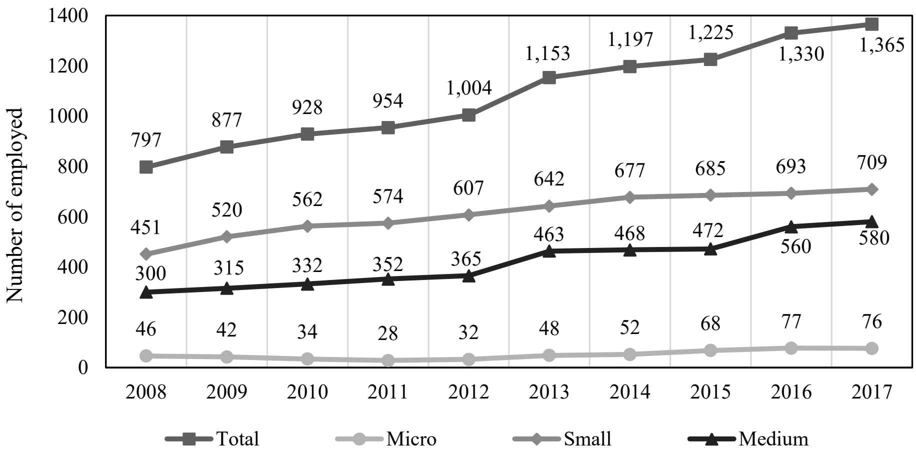

Figure 1. Number of people working in the examined SMEs in rural areas between 2008-2017
Source: own elaboration based on the results of the study

Table 2. Average employment in the studied group and transport companies in Poland and the European Union in 2008-2017 by size classes (in persons)

Specification	Average employment [person]									
Micro										
Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Surveyed group	2.1	2.3	2.8	2.2	2.3	2.8	2.9	3.5	3.9	4.1
The European Union	3.7	3.9	3.9	3.9	3.8	3.9	3.8	3.9	3.9	3.9
Poland	4.4	4.4	4.5	5.3	4.2	5.2	5.8	2.0	2.1	2.2
Small										
Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Surveyed group	14.1	14.4	13.4	14.0	15.2	17.8	19.1	20.1	21.5	21.8
The European Union	19.5	20.0	20.3	20.6	20.6	20.4	20.4	20.8	20.9	21.1
Poland	21.2	21.6	21.2	20.6	19.8	19.5	19.6	21.1	20.7	20.8
Medium										
Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Surveyed group	75	78.8	83	87.9	91.3	92.6	93.6	94.4	93.3	96.7
The European Union	107.9	91.4	96.5	95.9	96.2	96.2	96.4	96.8	99.8	101.5
Poland	95.0	95.3	96.5	95.7	97.6	97.5	97.0	104.5	104.9	105.1

Source: own elaboration based on the Eurostat database [EUROSTAT 2019] the European Union. The average growth of employed people in groups of small and medium companies indicated that surveyed entities between 2008-2017 were developing (Table 2).

Micro companies from rural areas took advantage of the labour of the unemployed and family members of the entrepreneur to a greater extent than other entities. Nearly 32.5% of people performing work in micro companies have not been employed under an employment contract. Frequently, they were owners (58.2%) and cooperating persons – 39.8% (owner family members). In small companies, persons cooperating as well as owners constituted, on average, 10.3% of all workers. The lowest percentage of such persons occurred in medium-sized companies (6.4%). This participation was higher than in case of entities located in urban areas, where the rate of unemployed staff in micro companies constituted 21.5%, 6.3% in small-sized companies and 2.4% in medium-sized companies.

Wages in transportation companies located in rural areas were taken into account as well. In 2017, average wages of drivers added up to PLN 3,201.46 and was 57.1% higher than in 2008. In the case of entities registered in urban areas, the average salary also increased during the period considered. In 2008, it amounted to PLN 2,210.14, while in 2017 it was PLN 3,621.15 (growth by 63.8%). The obtained data indicate that wages in the surveyed entities in urban areas increased, to a greater extent, than in rural areas. Salaries offered by entities located in rural areas, in 2017, were 11.6% lower than those offered by transportation companies located in urban areas. The differential underwent a growth during the analyzed period by 3.8 percentage points (p.p.). The smallest disparities occurred in wages among medium-sized companies, whereas the biggest were in micro units. A great growth in the compensation of surveyed entities resulted from a lingering upward trend during the years 2008-2017, when the year average growth of wages amounted to 5.2% (Figure 2). The situation was impacted by a growth in demand for transport services offered by Poland in EU territory, as well as by a need for a workforce and a growth in the overall number of transportation companies in the region.

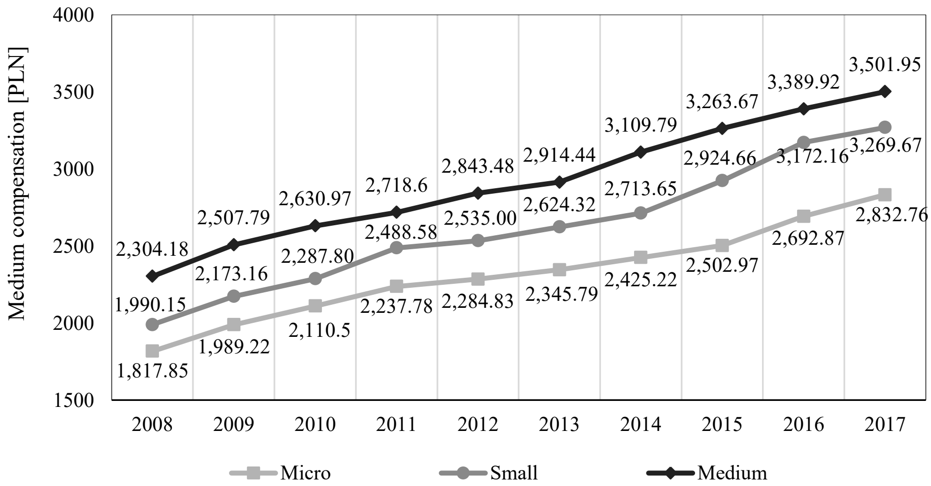

Figure 2. Average wages for drivers in companies located in rural areas in years 2008-2017
Source: own elaboration

Table 3. The benefits resulting from delegations and the total level of wages for drivers among surveyed entities located in rural areas between 2008 and 2017

Benefits resulting from delegations [PLN]										
Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Micro	1,318.41	1,648.26	1,696.30	1,734.39	1,812.07	1,933.80	2,067.11	2,192.71	2,320.22	2,447.74
Small	2,293.52	2,329.99	2,274.94	2,383.98	2,355.75	2,438.24	2,451.97	2,511.54	2,559.64	2,607.75
Medium	2,849.20	2,940.26	2,947.14	2,976.81	3,107.04	3,091.40	3,176.77	3,194.80	3,229.66	3,264.53
Driver salary in total [PLN]										
Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Micro	3,136.26	3,637.48	3,806.80	3,972.17	4,096.90	4,279.59	4,492.33	4,695.67	5,013.09	5,280.50
Small	4,283.67	4,503.15	4,562.74	4,872.56	4,890.75	5,062.56	5,165.62	5,436.20	5,731.80	5,877.42
Medium	5,153.38	5,448.05	5,578.11	5,695.41	5,950.52	6,005.84	6,286.56	6,458.47	6,619.58	6,766.48

Source: own elaboration

The highest wages, in 2008, were offered by entities registered in Stargard county (PLN 2,491.32) and Goleniów county (PLN 2,287.54). The lowest occurred in Koszalin county (PLN 1,880.76) and Sławno county (PLN 1,699.91). The situation did not undergo any significant change in 2017. The highest wages were still offered by companies located in Stargard county (PLN 3,279.53) and Gryfino county (PLN 2,915.54). The lowest compensation was offered in eastern parts of the voivodship.

Besides basic compensation, in accordance to Polish labour law, drivers receive a reimbursement of costs of delegations which are additional elements of their wage. The amount of additional benefits, in 2017, among rural areas, added up to an average PLN 2,773.34. During the surveyed period, a growth in paid benefits resulting from delegations was visible. The greatest value occurred in medium-sized companies – in 2017 it was PLN 3,264.53. However, the lowest provision was paid in micro companies (on average PLN 2,447.74).

The total level of wages during the surveyed period grew from PLN 4,191.10 in 2008 to PLN 5,974.8 in 2017 and in each and every unit category exhibited an upward trend (Table 3). The participation of benefits resulting from delegations in combined driver compensation amounted to 51.2% and grew by 2.7 p.p., between 2008 and 2017.

In case of entities registered in urban areas, the amount of benefits resulting from delegations in 2017 in relation to 2008 rose by 31.9% (from PLN 2,601.10 in 2008 to PLN 3,432.36

in 2017). Drivers employed in companies located in rural areas gained a lower total level of wages than those located in urban areas.

Studies show that between 2008-2017, in the given region, there was a deficit of professional drivers, resulting in added pressure on wage growth. Data from Regional Employment Agency in Szczecin show that there was a demand for professional drivers, which had been growing since 2011, however the supply of workers with adequate qualifications was decreasing. Lack of professional drivers was listed in every administrative unit – regardless of whether it was a rural or urban area. The greatest deficit of professional drivers was noted in the Southern part of the voivodship, the smallest – in Eastern areas.

In surveyed companies located in rural areas the participation of wages in costs amounted to an average of 12.6% and marginally grew during the years 2008-2017. The costs of wages burdened small companies to a greater extent (on average 13.9%) than medium entities (9.2% on average). What is more, in medium companies, the participation of wage costs was more stable than in the case of micro and small-sized enterprises. It constituted, on average, 9.8% of the costs of entrepreneurship. This participation among entities located in urban areas differed modestly and amounted up to 11.7%.

The deficit of drivers on the job market contributed to a growth in wage expectations.

In districts with a higher driver deficit indicator, the remuneration paid by the surveyed entities was found to be at a higher level than in other areas. Despite economic slowdown in Poland and the EU in 2009-2013, there was no reduction in wage growth rate in the studied group. At the same time, between 2014-2017, in which the annual growth rate began to increase, there was additional pressure on wage increases. Thus, it can be concluded that both the economic situation and lack of an adequate number of professional drivers on the regional labour market had an impact on the increase in remuneration in this professional group.

It results that a lack of an appropriate number of qualified drivers on the job market not only had an impact on job costs but also constituted a barrier against the development of companies. More than half of the surveyed companies from rural areas (58.6%, i.e. 34 entities) indicated that they had a problem with acquiring workers on the local job market. To a greater extent, these difficulties occurred among micro companies (69.2%) and small-sized ones (59.0%). Among medium businesses – 33.3% of entities indicated difficulties with obtaining professional drivers. In 47 companies the possibilities of sourcing occupational drivers worsened during the years 2008-2017.

According to representatives of surveyed companies, the main factors shaping the reduction of demand on workers on the job market were: a reduction in the number of new drivers (25.2%), emigration to other EU countries (24.7%) and vast concurrency among employers (19.8%). The decrease in the number of drivers, as well as the growth in need for such employees translated into the creation of a fluctuation of employed personnel. This phenomenon occurred in 33 surveyed entities (56.9%), mainly impacting micro companies (76.9%) and small units (53.8%). In the case of medium-sized companies it was only visible in 33.3% of instances.

Simultaneously, 48.3% of entities located in urban areas could not find qualified workers, of which 28.1% pointed to concurrency among carriers as a reason for this phenomenon. The fluctuation of workers occurred in 39.7% of entities. This data is similar to the results achieved by companies from rural areas of the West Pomeranian Voivodship.

The consequences of personnel problems were similar in individual categories of companies located in rural areas. Respondents pointed to the following consistencies: incomplete usage of fleet (22.4% of respondents), difficulties with the timely implementation of agreements (15.5%) and loss of agreements and orders (15.5%). Similar results for the functioning of the company were pointed by entrepreneurs with headquarters in cities. They listed: difficulties with the timely implementation of agreements (24.4%), incomplete usage of the fleet (17.1%), a decrease in the trust of a company (13.8%) as well as loss of agreements and orders (12.2%). In both cases about 11% of respondents recognized a drop in revenue triggered by a deficit in drivers.

CONCLUSIONS

The obtained results showed that between 2008 and 2017 both wages and employment increased in the studied entities. This demonstrates the development of the road transport sector in rural areas of the West Pomeranian Province. At the same time, these parameters were slightly lower than in enterprises located in urban areas. It should be noted, however, that rural areas were an attractive place for the development of international road carriers.

The studied enterprises had to face many problems resulting from the situation on the labour market. The most severe challenge was to meet the shortage of qualified staff and the increase in salaries. Most of the surveyed units, in the analyzed period, experienced direct consequences related to a lack of professional drivers on the local labour market. The most serious of them included the incomplete use of existing transport means as well as problems with maintaining transport contracts. In addition, employee fluctuation was a serious problem affecting a lack of long-term stability and hindering the functioning of the surveyed entities.

The obtained results indicate that the changes taking place on the labour market mainly affected micro-enterprises that had fewer opportunities to increase wages. Small enterprises, even with greater financial resources, due to the unfavourable situation on the labour market, had to postpone investment decisions (concerning the purchase of new vehicles) due to uncertainty regarding whether or not they would recruit employees. In addition, higher wages in enterprises from urban areas resulted in wage pressure in entities located in rural areas, which was also influenced by the high mobility of professional drivers.

The deficit of drivers in bulk road transport companies in Poland and the West Pomeranian Voivodship is currently being lowered by drivers from the Ukraine and Belarus, who accept current wages. It is important to notice that the problem with acquiring professional drivers is a basic constraint of the development of micro, small and average-sized companies of the road transport sector. A shortage in staff and growing wages indirectly impact the decline in the competitiveness of Polish transport companies which, so far, have dominated among European Union markets. For sure, the situation will not improve by implementing solutions by the EU in the range of mobile workers created to counteract "social dumping" [Kutak 2017].

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WPŁYW DEFICYTU KIEROWCÓW ZAWODOWYCH NA ROZWÓJ PRZEDSIĘBIORSTW TRANSPORTOWYCH Z OBSZARÓW WIEJSKICH WOJEWÓDZTWA ZACHODNIOPOMORSKIEGO

Słowa kluczowe: rynek pracy, deficyt kierowców, wynagrodzenia, transport drogowy ładunków, obszary wiejskie

ABSTRAKT

Celem artykułu jest przedstawienie i ocena skutków deficytu kierowców zawodowych oraz zmian wynagrodzeń dla działalności i możliwości rozwojowych przedsiębiorstw transportu drogowego ładunków z terenów wiejskich Pomorza Zachodniego. Zastosowano analizę literatury, analizę porównawczą i elementy statystyki opisowej. Materiał badawczy stanowiły dane dla 58 przedsiębiorstw transportowych zarejestrowanych na obszarach wiejskich województwa zachodniopomorskiego. Dane finansowe oraz dotyczące zatrudnienia pozyskano ze sprawozdań finansowych i baz danych – InfoVeriti i Bisnode Polska. Dla określenia danych jakościowych zastosowano metody ankietowe – CAWI i CAPI. Oceniono zmiany w wielkości zatrudnienia badanych podmiotów oraz wysokości wypłacanych w nich wynagrodzeń w latach 2008-2017. Uzyskane wyniki wskazują, że w badanym okresie zwiększyło się zarówno zatrudnienie, jak i wynagrodzenia oraz pozostałe świadczenia wypłacane dla kierowców. Przedsiębiorstwa z obszarów miejskich i wiejskich wskazywały na poważne problemy z pozyskaniem pracowników. Określono również skutki deficytu kierowców dla przedsiębiorstw, były to: trudności w znalezieniu pracowników, rosnące koszty pracy, rotacja zatrudnienia, niepełne wykorzystanie taboru i trudności z terminowym realizowaniem kontraktów. W opinii badanych przedsiębiorstw na problemy kadrowe przekładały się takie czynniki, jak spadek liczby osób posiadających odpowiednie uprawnienia na rynku pracy, emigracja zarobkowa oraz duża konkurencja wśród pracodawców.

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