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Quality of service: a key factor in the competitiveness of transporters: the case of Moroccan operators of International Road Freight Transport

La qualité de service : un facteur clé de la compétitivité des transporteurs : cas des opérateurs marocains de Transport International Routier de Marchandises

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Abstract
In the context of globalization, companies and governments alike are facing tough and evolving competition. Indeed, in order to survive and make profits, it is imperative to remain "competitive" on the external and internal markets and to offer a superior service quality to that of competitors. This paper is part of an attempt to conceptualize "service quality" in the context of road freight transport. Its objective is to identify the importance of the "quality of service" dimension in determining the competitiveness of carriers, and to outline the elements that make up this dimension. The research consists of a theoretical overview describing the reference framework and a qualitative study based on semi-structured interviews with 12 IRFT (International Road Freight Transport) companies and 9 exporting companies.
The results of the research confirm that the quality of service remains the key factor of competitiveness of Moroccan TIRM operators serving Europe. Indeed, service quality in the TIRM consists of the provision of safe, reliable and efficient transport services, including the use of new equipment and technological facilities as well as a variety of services provided, among others.

Keywords: International Road Freight Transport (IRFT); competitiveness; service quality; requirements of carriers; foreign competition.

Résumé
Dans le cadre de la mondialisation, les entreprises comme les gouvernements se trouvent face à une concurrence rude et évolutive. En effet, afin de survivre et réaliser des profits, il est impératif de rester « compétitif » sur les marchés extérieur et interne et d'offrir une qualité de service supérieure à celle des concurrents. Ce papier s'inscrit dans le cadre d'un essai de conceptualisation de « la qualité de service » dans le contexte du Transport Routier de Marchandises. L'objectif est de déceler l'importance de la dimension « qualité de service » dans la détermination de la compétitivité des transporteurs, et d'exposer les éléments qui composent cette dimension. La recherche porte sur un survol théorique décrivant le cadre de référence et une étude qualitative basée sur des entretiens semi-directifs menés auprès de 12 entreprises de TIRM et 9 entreprises exportatrices.
Les résultats de la recherche confirment que la qualité de service reste le facteur clé de compétitivité des opérateurs marocains de TIRM desservant l'Europe. À cet effet, la qualité de service dans le TIRM concerne l'offre des services de transport sûrs, fiables et efficaces, notamment, l'utilisation de nouveaux équipements et installations technologiques et la variété de l'offre de services entre autres.

Mots clés : Transport International Routier de Marchandises (TIRM) ; compétitivité ; qualité de service ; exigences des chargeurs ; Concurrence étrangère.

Introduction

Research on competitiveness started more than four decades ago, however it seems to be growing in recent times, as many economic facts are nowadays assessed according to the criterion of competitiveness. It represents a condition for success or even survival in the actual market as, today, any company is subject to competition.

The various definitions of competitiveness in recent years specify that service quality is a key factor in the competitiveness and performance of companies operating in a more open, risky and globalized environment. Indeed, a review of various studies on this issue clearly demonstrates that quality is the most frequently used variable to assess the concept of competitiveness of companies (Riglova & al., 2015; Durbaca & al., 2012; Gutiere & al., 2012).

Moreover, "competitiveness" is a universal concept that is perfectly suited to service sectors such as road freight transport (RFT). Actually, transport operators are nowadays evaluated according to their level of competitiveness. In the RFT sector, price is not always the main competitive factor. Competition depends more on the quality of services (Savy, 2006; Kowalska, 2014; Brdulak, 2009; Koźlak, 2008). Thus, the quality of services and the conditions of the provided service are currently more important determinants of competitiveness more than the price.

In fact, we have noticed that only a few research studies on the RFT sector have focused on service quality of the transport. In this sense, we seek to answer the following question: To what extent does the provision of transport quality service condition the competitiveness of national IRFT operators? And how is the perceived service quality defined in this chosen field of investigation?

In order to understand the importance of service quality as a main determinant of the competitiveness of RFT firms and to try to conceptualize service quality in this field, we conducted a qualitative study based on semi-directive interviews with IRFT companies in Morocco and with exporting firms using IRFT as the main means of transport for their export goods.

In this paper we will examine the different requirements of shippers in terms of the criteria for selecting a carrier, but also the components of the service quality of a transport operation. We will first discuss the notion of competitiveness and the importance of the determinant of service quality, then we will present a conceptualization of the service quality dimension,

followed by a review of the literature on the determinants of the competitiveness of MRT firms, then we will present the methodology adopted and finally we will focus on the results of our qualitative study.

1. The competitiveness of companies and the importance of the "quality" dimension

Competitiveness is now the major concern of firms as well as nations in their quest for success. Several definitions have been proposed by different authors and economic currents. From these proposed definitions, the assumption that emerges is the fact that competitiveness globally signifies the ability to face and stay ahead of the competition. Competitiveness is today "a necessity for every company to face competition and meet market demands" (De Woot & Koenig, 2013, p.1).

Furthermore, "having a competitive advantage allows the company to stand out from its competitors and ensures a higher level of competitiveness" "(Mazouz and Saoussani, 2019, p. 455).

According to Diguet and Ternisien (2001), the competitiveness of a company is a capability of developing an advantage over its market competitors. A company is competitive if at a given moment it holds one or more advantages over its competitors. As Fereru (2008) points out, “competitive advantage is the achievement of a profit that is sustainably superior to that of competitors” (Fereru, 2008, p.116). This means that the company has competitive advantages when it is ahead of its competitors.

Competitiveness is not only measured by a quantitative foresight. Competitiveness is a richer concept, since it refers to the ability to innovate, to design products and services that only the company can develop or master. More than performance, it is about creating a competitive advantage.

Several studies focus their analysis on product and service quality as a particular aspect of firm competitiveness (e.g. Swann & Taghave, 1994). Indeed, to provide customers with greater value and satisfaction than their competitors, firms must be efficient and concerned about the quality of their products and services (Johnson, 1992; Hammer & Champy, 1993).

Furthermore, multiple studies and scientific works have shown that service quality is a multi-faceted growth factor and represents a real development potential. This suggests that improving service quality as a strategic tool is the source of many competitive advantages (Aslinda, & Ganesh, 2014), and represents a key factor in the competitiveness and

profitability of companies (Delgadillo, 2013).

In addition, Porter (1990) explains the importance of service quality in achieving competitive advantage. Indeed, quality, product characteristics or after-sales services allow companies to differentiate themselves from competitors, thanks to the offer of superior products. Furthermore, a Van Berkum (2004) note that what determines the non-competitiveness of firms is their low quality of products, services and processes.

Service quality is then seen as a major competitive advantage for a company, allowing it to increase its market share and thus improve its competitive position (Berry & al., 1988) cited by (Casas Medina & Ibarra Morales, 2015).

2. The conceptualization of quality of service

Quality is an ambiguous and complex concept, it is a value appreciated by customers and that evolves over time. It is defined as the ability of a set of intrinsic characteristics of a product, system or process to meet the requirements of customers and other interested partakers (ISO 9000, 2015).

The term "requirements" covers the needs or expectations of customers, which can often be expressed indirectly. Accordingly, requirements often translate into characteristics with specific criteria of shape, size, and strength. Requirements might also include performance, reliability, maintainability, durability, ease of use, safety, low cost, timeliness and environmental friendliness. Therefore, a quality product is one that, in these respects, satisfies the user as completely as possible (Ennesraoui, 2022).

Although service quality is widely recognized in the literature as a determining factor of the firm's competitiveness, we do not find universal definitions of service quality and its dimensions. There are several models of service quality, the best known of which is the SERVQUAL model that continues to inspire service quality research. The SERVQUAL model is used by many researchers because of its ease of use and adaptability to various service sectors (Morales & al., 1998).

The SERVQUAL model was developed by Parasuraman & al. (1988), who consider service quality to be the result of a comparison between what costumer considers the service offered by the company should be (expectations) and their perceptions of the performance of the service actually provided. This model is a scale composed of 22 statements, grouped into five dimensions (tangible factors, reliability, helpfulness, assurance and empathy) described in the table below:

Table 1: Dimensions of the SERVQUAL model

Dimensions	**Definitions**
Tangible elements (4 statements)	Physical facilities, equipment and staff appearance
Reliability (5 statements)	Ability to deliver the promised service confidently and accurately
Serviceability (4 statements)	Willingness to respond to customers and provide prompt service
Insurance (4 statements)	Competence and courtesy of employees and their ability to inspire confidence
Empathy (5 statements)	Consideration, individualized attention that the company gives to its consumers

Source: Adapted from Morales & al. (1998, p.4).

In analyzing the literature, we have identified two main trends in various works dealing with service quality: objective quality and subjective quality. The former focuses on the designer's perspective and the latter on the consumer's perspective (Delgadillo, 2013) cited by (Kamli & Cherchem, 2021). However, consumer-centric thinking is widespread in the marketing literature. In the absence of objective measures, most authors have adhered to this view of service quality, which takes into account the perceptions of those who value it (Gronroos, 1984), and thus deals with the concept of perceived service quality, considering the best way to conceptualize quality in the third sector (Markovi & Raspor, 2010). From the customer's point of view, service quality is a highly subjective and relativistic phenomenon (Ko & Wu, 2013), and presents a complex analytical problem as the subjectivity considered by consumers requires multidimensional characteristics ranging from the criteria used to define and measure the tangible (Villalba Sanchez, 2013), imply that service companies gravitate towards psychological, socio-cultural and situational approaches to the perception of quality by users.

3. Quality of service: an undeniable competitive factor for road freight transport companies

RFT is a fast-growing service activity and an essential part of economic life. Thus, before dealing with the competitiveness of RFT companies, it is imperative to address the competitiveness of a service company in general and its determinants.

3.1. Competitiveness in the service sectors

The concept of competitiveness can usefully be applied to service companies. It is the set of actions put in place by the company to establish over the long term one or more competitive advantages that can distinguish it from its main competitors. For service companies, these

elements are intangible in nature, since services are typically intangible and immaterial (Diguet and Ternisien, 2001). The authors classify these elements as five, namely: human capital; organizational capital; innovation capital; customer capital and provider capital. It should be noted that the combination of all these intangible capitals determines the competitive advantage and the level of competitiveness of a service firm.

Human capital is the primary source of value creation in the service company. A competitive company is one that has more talented, better trained human resources able to take initiatives. Innovation capital is the second factor that can explain the competitive advantage of a service company over its competitors. It is the company's capacity to produce new services and to anticipate technological developments in order to better meet the needs of its customers. In addition, organizational capital concerns the way in which the service company operates in terms of organization and the control of incoming and outgoing flows (Diguet et Ternisien, 2001).

Moreover, customer capital is a very important element for service companies. Indeed, the link between the service provider and its client must be a strong and close one throughout the process of service delivery. Therefore, the ability of a service company to anticipate the latent needs of its customers and to provide a service in line with the expressed needs is an essential factor of competitiveness. Finally, the provider capital is also important insofar as the shareholder, the banker and the employee become central partners that the company seeks to develop and retain (Diguet et Ternisien, 2001).

3.2. The competitiveness of a road freight transport company

After reading the existing literature on the topic, we note that the determinants of competitiveness at the level of RFT firms are linked to the selection criteria of the transport and the transport company by customers and shippers.

Transport services can be evaluated on the basis of several criteria, including the level of competitiveness (Kowalska, 2014). The most important factors determining the level of competitiveness of a freight transport company are based on the price of the transport as well as the quality of the provided transport service, since shippers are interested in the quality aspect of the service offered by the carrier and are increasingly seeking to optimize the price-quality ratio.

Transport companies "may gain a competitive advantage by offering clients better and greater value than the ones promoted by competitors" (Batarlienė et al., 2017, p.112).

Moreover, for Romanov (2003), the determinants of competitiveness include: the company's credibility, based particularly on recommendations from other customers and time in the market; deliveries' reliability, which refers to speed and punctuality; means of transport used; frequency of transport; the size of the fleet; the transport price and the various costs.

Furthermore, Koźlak (2008) identifies a set of factors that enable a transport company to gain competitive advantage, including cost, technology (the quality of the fleet and infrastructure used and the use of new IT systems); staff qualifications; organizational efficiency and business strategies.

On one hand, Brdulak (2009) explains, in a research conducted on the profile of the transport and logistics company to identify the main factors that determine the level of competitiveness of transport services, that the customer takes into account several factors when choosing the carrier for his goods. He cites, among others, the quality of service, the fleet, customer service, price and delivery cost, reliability and credibility of the company.

On the other hand, Savy (2006) shows that competition in the freight transport sector can be based on the quality of services, considering multiple factors where price is not always the key one. Furthermore, Kowalska (2014) points out that the determinants of the competitiveness of transport service companies are: price, quality of services and conditions of the provided service (Kowalska, 2014, p.6).

We note that the analysis of competition between freight transport modes or between operating companies frequently refers to the concept of the service quality. However, the concept of transport service quality is not unanimously defined. Each author agrees on a certain number of criteria capable of giving an overall assessment of the concept of transport service quality.

For the freight transport company, improving its service quality might lead to an increase in transport costs, but it might also lead to a decrease in the logistics costs and, consequently, to a strengthening of the company's competitiveness (Bernadet, 1985, 2010).

3.3.Quality of service in road freight transport

Today, transport operators have increasingly acknowledged that improving the quality of transport services is crucial for gaining a competitive advantage. Nevertheless, studies that address the dimensions or determinants of service quality in the freight transport sector remain scarce. We have observed in the literature that these dimensions and determinants reflect the criteria for the selection of carriers or transport modes by customers. Indeed, studies in this

area are more interested in carrier selection decisions than in the attributes of the service quality dimensions of freight transport. The analysis of selection variables enables the identification of service and performance attributes, considered as dimensions of transport service quality.

There is no consensus definition of transport service quality in the literature. Each author uses certain criteria to assess transport service quality, such as speed, safety, variety of services, reliability, credibility of the company, etc. The list of criteria may vary among authors and studies on the topic, and there is little attention paid on how customers value and prioritize these selection criteria. The list of criteria may vary among authors and studies conducted on this topic, and little attention is paid to how customers value and prioritise these selection criteria. The research shows that users rank these characteristics according to their needs and emphasizes that users and shippers have different levels of requirements and are insensitive to the same service quality characteristics.

For Pearson (1980), the most important transport service quality criteria are: flexibility, transit speed, reliability and regularity. Brooks (1985, 1990) has also examined the issue of carrier selection decisions and provided a set of criteria involved in shippers' selection of carriers: frequency of trips, travel time, consolidation, on-time delivery, cost of service, staff co-operation, carrier flexibility, speed of response to claims, route traceability, commercial service, carrier reliability, carrier's experience with loss and damage, publicity, etc.

Slack (1985) also examined the criteria used by shippers in their carrier selection decisions, which are: company and fleet size, equipment, proximity (location), cost and transport safety. Similarly, studies by Murphy & al (1989, 1991, 1992) demonstrate that equipment availability, shipment information, loss and damage performance, loading, consolidation and delivery times are the main criteria adopted by carriers.

Lopez and Poole (1998) indicate that three dimensions contribute to service quality, namely efficiency, speed and safety. Frankel (1993) believe that the following criteria indicate the main concerns of transport service quality: service reliability, service time, on-time delivery, loading capacity, safety, cargo security, control and monitoring of cargo flows, error-free documentation, transport cost, billing and cost management, and intermodal management.

According to Bernadet (1985, 2010), the service quality of freight transport is defined in a multidimensional framework taking into account several criteria, mainly: speed, punctuality, security and traceability, particularly the production of information linked to the circulation of physical flows (Bernadet, 1985, 2010, p.88-89). Burmeister and Colletis-Wahl (1997) also

support this idea and show that the efficiency of freight transport depends essentially on the ability to control flows, reliability, flexibility, the ability to adapt the mode of transport to the rhythms and constraints of production, as well as the efficient association of information flows for better transport traceability.

In this respect, Bernadet (1985, 2010) points out that it is necessary to start by identifying the characteristics of a "satisfactory" freight transport service in order to be able to give a precise definition of freight transport service quality. According to the author, a satisfactory transport service must be: fast, punctual, safe and be associated with a fast, punctual and safe information flow system.

From the above, it can be seen that the dimensions of freight transport service quality can be summarized as follows: punctuality, speed, security and traceability.

Punctuality: This characteristic also corresponds to "reliability" or the respect of delivery deadlines. The goods must arrive at the right place, at the right time and in accordance with the carrier's commitment to the customer. Furthermore, shippers consider timeliness of delivery as an important, even crucial criterion and prefer better reliability for their shipments rather than shorter transit times (Blardone, 2007, p.38).

Safety: this factor refers to the arrival of the goods in the right condition with the absence of damage. Indeed, safety is an element of the goods transport service that depends on the mode of transport used, the conditions of the journey imposed by that mode of transport, such as the ancillary logistical services (loading and unloading of the goods) and the appropriateness of the packaging.

Safety also depends on the number of load breaks and routes (Legrand & Martini, 2008, p.7). The importance of this criterion varies according to the type of goods to be delivered. In the case of high value-added goods, transport demanders primarily require safe delivery of the goods.

Speed: This is a key feature of the demand for transport of certain goods, particularly for perishable (or high-value) goods that can only be transported for very short periods. In this case, shippers may pay a higher service charge to have their goods transported as quickly as possible. It should be noted that for some goods the delivery time can be a decisive criterion, especially in the case of exceptional orders or the delivery of spare parts needed for the production process.

Traceability: this criterion concerns the circulation of information. It is linked to the implementation and development of logistics and IT systems in freight transport companies.

The requirement for feedback from the customer at all stages of the service provision has become commonplace in RFT. Indeed, the requirement for feedback is important since RFT is part of a logistic chain whose implementation implies the existence of an information circulation system allowing the physical flow of goods to be controlled and adapted rapidly to the needs defined by the clients (Bendriss, 2009).

The integration of new information and communication technologies (ICT) has become a vector for the evolution and performance of companies (Mebarki, 2013, p.111) and an important element in the development of the trucking industry and the efficiency of the RFT in general, necessary for the rationalization and control of the transport activity. Also, the use of new on-board computer systems[1] has become essential to monitor the performance of the drivers' work, to collect and provide real-time information on the vehicles, which allows the monitoring and sharing of information and data with the customer and the company's administrative staff, but also the real-time monitoring of the condition of the goods by the shipper, including temperature control and security of the goods (Desfontaines, 2005).

Moreover, as Bernadet (1985, 2010) points out, when a shipper chooses a carrier, he takes into account its "adaptability", i.e. its ability to provide services of different characteristics, and its "logistical aptitude", i.e. its ability to provide a variety of services and ancillary logistics operations, since shippers increasingly expect carriers to take on services other than the physical movement of goods and to manage a transport chain involving related services, such as warehousing, stock keeping, order taking and management, delivery preparation, invoicing, customs documentation management, etc.

We note that, unlike the four dimensions mentioned above, the two dimensions "adaptability" and "logistical aptitude", which concern the supply of ancillary services, are more related to the carrier than to the transport itself. The quality of freight transport service is therefore part of a six-dimensional space, with four dimensions relating to the quality of service of the transport itself, and the other two relating to the carrier's ability to meet a wider range of needs expressed by the shipper.

In addition to these concerns related to the quality of transport services, the quality of RFT now includes a dimension related to environmental concerns. In fact, quality of service in transport is defined in relation to many elements beyond the simple provision of quality

[1] On-board computer systems" refers to all systems for acquiring, processing, exchanging and recording data relating to the goods and their condition, speed, vehicle condition, load, routes and the road environment, between the vehicle, the driver, the administration, responsible for the fleet and invoicing, and the customer.

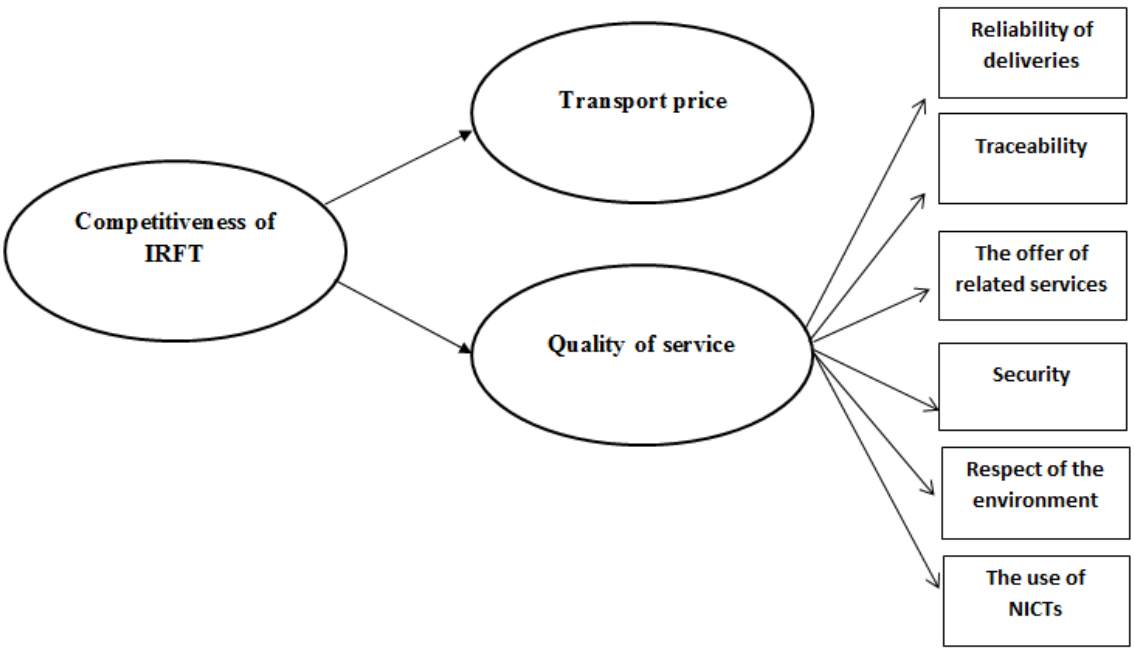
services.

Indeed, as Hawkins (2001) and Bengtson (1992) point out, the quality of RFT is closely related to safety and environmental protection issues. The importance of safety and environmental concerns highlights another dimension of road transport services, namely corporate social responsibility.

RFT companies are therefore concerned about safety and environmental protection issues and about the responsible behavior of freight transport service providers. This sustainability dimension is increasingly recognized by RFT operators and transport sector stakeholders in general, but also by academics and politicians, as evidenced by the work of Perotti & al., 2012; Seuring and Muller, 2008; Zhu & al., 2008; TK'Blue, 2016, as well as initiatives such as the Green Award (Green Award, 2004) and COP 22 (AMDL, 2016).

3.4.Theoretical model:

Figure 1: Theoretical model



Source: Authors

4. Methodology

4.1. The study conduct and the choice of methodological tool

Epistemologically, qualitative research brings answer to the object of study in a holistic, interpretative, direct and proximal way (Muchielli, 2009). According to Gaspard (2019)[2], qualitative data collection is carried out throughout several techniques, mainly observation, interview and focus group. Our study is based on the semi-structured interview because of its exploratory and qualitative aspect. The semi-structured interview is the type of interview frequently used in qualitative research (DiCicco-Bloom and Crabtree, 2006) and the most frequently used in management sciences (Roussel and Wacheux, 2005).

4.2. Data collection

The data for our qualitative study were collected using two interview guides composed of a number of themes that facilitate the sequence of ideas and opinions of the interviewees: the first concerns IRFT companies in Morocco; the second concerns exporting companies that use IRFT as their main means of transport to export their goods. Most of the interviews were conducted face-to-face at the company site and two interviews were conducted by telephone. Each interview lasted approximately 25 to 30 minutes. Depending on the wishes of the interviewees, some interviews were recorded and others were transcribed on site.

4.3. Method of data analysis

Our data analysis approach was put in place at the time of data collection. During the interviews, we took notes and wrote comments based on the interviewees' responses. As noted by DeJonckheere and Vaughn (2019), the general process of analyzing and interpreting interviews is to examine the recorded data while applying descriptive codes to the data by categorizing and condensing it.

To analyze the interview data, we first listened carefully to the recordings and reread the transcripts to condense the data collected. We then selected the most significant quotations relevant to the topic of our study. To process the information from the interviews, we opted for the content analysis method known as "summary-synthesis", which is a form of interview analysis based on the reduction of the data collected in order to keep only the main ideas that are important for the investigation.

[2] Online at the link: https://www.scribbr.fr/methodologie/etude-qualitative/

The summary-synthesis method is based on two complementary approaches to qualitative analysis, namely the vertical and horizontal approaches. The vertical approach consists of identifying in each interview the main ideas and key words that are relevant to the exploratory study. The horizontal approach consists of identifying recurrences and repetitions in the different interviews. In this case, the answers are processed in a global and transversal manner in order to extract the comparable elements between the various interviews conducted (Gavard-Perret & al., 2008).

4.4. The representativeness of the sample

Representativeness and sample size should take into account the purpose and quality of the interview, the analytical strategy and the homogeneity of the sample (Malterud & al. 2016). In determining the size of qualitative samples, the common standard is to reach thematic saturation. Thus, in order to set the size of our sample to obtain satisfactory results, and in light of the principle of information saturation founded by Glaser and Strauss (1967), our sample was set at 12 interviews conducted with executives and managers of IRFT companies (two subsidiaries of European companies, the SNTL group, two large companies and seven Moroccan SMEs) and nine exporting companies from different sectors (export of fruit and vegetables, export of textiles and export of fishery products).

5. Results of the exploratory study

5.1.Selection Criteria of transporters

After analyzing the various interviews conducted with shippers, we understand that freight transport is a service that is subject to both supply and demand. The supply of freight transport concerns all modes of transport. Thus, the description of the supply of each of these modes consists in identifying the characteristics that make the mode of transport capable or not of carrying out a given transport operation. The transport request should not rule out any possible solution, and it is therefore important for the applicant to analyze the available local infrastructure (proximity of international airport, port, railway station, etc.), bearing in mind that this choice is limited in the case of international goods transport, where road or inland waterway transport is generally used. It is also essential to identify the goal of the company requesting the transport service, i.e. whether the company's goal is to export at minimum cost or to obtain delivery times compatible with the characteristics of the goods and the importer's demand, or whether the company is looking for security in the transport operation.

The concerns of an applicant for freight transport may be different, due to the variety of goods and the various possible reasons for their transport. In this sense, it should be noted that the means of transport offered at a given point cannot satisfy every conceivable requirement of the customer, but it must imperatively meet the priority requirements and criteria of the freight transport applicant.

After defining the elements of the transport operation, including the nature of the goods to be transported, the quantity of goods, the origin and destination of the transport, the transport applicants reveal the main motivations, which concern both the cost of the transport and a set of qualitative requirements.

The criteria for choosing carriers differ from one shipper to another. It should be noted that the responses from exporting companies were different, sometimes with common points. The choice of carriers is based on the price of transport, on the reliability of deadlines, on the company's brand image and expertise, on traceability, but also sometimes on the logistics service package offered.

For companies exporting citrus fruit, early fruit and fish products, the first criterion of choice is the quality of the fleet (special temperature-controlled vehicles), followed by speed and traceability throughout the journey. Indeed, as R16 stated, “the goods we export require complex delivery and transport conditions, both in terms of loading the goods onto the trucks and during the journey. For us, the primary concern is to preserve the freshness of our goods and to have them transported within the required timeframe and quality, which is why the choice of vehicles and companies with know-how in the transport of this type of cargo is essential”. Apart from the expertise of the transport company, the first criterion of choice is undoubtedly traceability, “the transport company we choose must equip its fleet with the latest information and communication technologies to enable us to follow in real time the respect of the required temperature as well as the route taken to anticipate the probable delivery date”.

Companies exporting citrus fruits and vegetables also revealed speed as a key criterion, since these products are perishable food products. Reliability in terms of deadlines remains a common criterion among most exporting companies in different sectors of activity, since any delay in transport and delivery is closely linked to their commitments to their foreign customers and therefore impacts their reputation and customer loyalty strategy.

Also, the brand image in terms of security of deliveries was mentioned by R21 (forwarder). For them, this is an essential criterion for the transport of high-value-added products.

According to the respondent, the first criterion for the transport of bulk products is the price of transport and then the reliability of delivery times.

R14 stresses that the company that is going to transport its goods offers a range of ancillary services, "it is preferable to concentrate on its core business and to entrust the organization of the transport from A to Z to a single service provider who will take care of storage, loading, transport and the management of customs documentation at the same time, this saves money and time and limits the scope of responsibility".

As regards transport to Africa, the respondents explained that the level of requirements in terms ofservice quality is lower. Indeed, African customers are not very demanding in terms of traceability and punctuality as compared to Europeans. Thus, the vehicles authorized to travel to Africa do not have the same characteristics and performance as those carrying goods to Europe. There are no standards or age limits. The criterion of choice is essentially based on the price of transport.

5.2. Determinants of the competitiveness of IRFT operators

An analysis of all the interviews conducted with IRFT operators in Morocco shows that to be competitive at an international level, it is compulsory to make several trips and to optimize the use and filling of road vehicles as much as possible, while minimizing empty trips and avoiding idle time as much as possible (waiting times). Regarding IRFT companies serving Europe, respondents state that to be competitive it is indispensable to match the quality of services offered by European companies. This is illustrated by R6, who stated that "in order to compete with other companies, you need to share roughly the same performance levels. Any inconsistency in service quality will undoubtedly influence negatively the competitive positioning". Thus, in order to compete with European companies, it is necessary to develop its quality of service while relying on human qualifications and the development of fleets and technologies.

During the interviews, several respondents stated that no company today can do without new information and communication technologies. On-board computer tools are of great use to transporters both for traceability and for good fleet management. In order to be competitive, it is needed to follow the latest technologies in on-board computer systems and to constantly modernize the fleet of vehicles to ensure reliable, safe and efficient transport.

Competitiveness in the IRFT also depends on the respect of time commitments, the reliability of deadlines and the speed of deliveries which are very decisive elements in international

competition. Every delay leads to a loss of money (fines and penalties) and a deterioration of the brand image. In this sense, R6 underlines that "competitiveness in the IRFT sector depends essentially on the quality of service and the optimization of the use of road vehicles. Any operator offering a transport service that meets the quality and reliability requirements and can access return loads in the shortest possible time will undoubtedly be competitive and develop a network of customers at the international level".

5.3. What are the applicants looking for when choosing an RFT

Flexibility of the RFT mode is the first criterion sought by applicants. The flexibility of the mode of transport covers both the possibility of sending small quantities of goods, as well as collection and delivery to any location. RFT offers a range of supplementary transport services, a wide range of services such as groupage and express freight, and a variety of transport vehicles adapted to each commodity (trucks, trailers, semi-trailers, etc.).

Among the criteria that highlights the choice of RFT applicants, there is also the ease of transshipment thanks to the container (without load breakage) and the possibility of combined or multimodal transport. We should also add the possibility of door-to-door transport, the advantageous speed/price ratio, and the relatively short delivery times, thanks to road infrastructures and simplified customs procedures.

5.4. The Quality of the offer of national IRFT service operators in Morocco

From the judgment of exporting companies using the IRFT, we understand that there is a strong upgrading in the quality of service provided by Moroccan IRFT operators. Therefore, the interviewees show that several Moroccan companies have renewed their vehicle fleets in order to be able to access the European market, which for reasons of sustainable development has limited the age of incoming vehicles. These new generations of vehicles allow great progress in terms of speed, road safety and traceability.

Nevertheless, there are still operators who care less about service quality. These are mainly small companies with fewer dedicated managers and unqualified staff, or companies with financial problems or difficulties in accessing loans. The latter mainly perform trailer pulling or transport to African countries. These companies offer a modest, if not mediocre, quality of service. In this respect, we note the non-respect of the cold chain, of authorized loadquantities and of safety standards, not to mention the lack of investment by these companies in new information and communication technologies and on-board computer systems facilitating the management of the fleet and ensuring better traceability.

Also, the majority of Moroccan IRFT companies only provide transport services and rarely offer additional logistics services. Only a few large companies or Moroccan subsidiaries of foreign companies offer these additional services.

The level of competitiveness of Moroccan companies differs according to the size of the company, its organizational and financial potentials, but also according to the range of provided services. In this sense, R2 accentuates that "we can be proud today of some Moroccan IRFT companies that can compete on the international market and change the appreciation of foreign companies on the service quality of Moroccan transporters. We see a great deal of know-how, flawless organizational qualities and a high level of service quality". R2 adds that "in order to have a competitive sector, it is necessary to promote and modernize all the entities that compose it. Unfortunately, the majority of small Moroccan IRFT companies are still unable to meet the challenges of international competition, especially because of the gap in the offered service quality.

5.5. Discussion of the results

On the basis of the theoretical model developed and in light of the results of our exploratory qualitative study, we can develop a conceptualization of the quality of service in the field of IRFT. Indeed the results of our study on the dimension of service quality in this field of application, coincides to a large extent with the various theoretical advances of authors (Bernadet (1985, 2010); Lopez and Poole (1998); Kowalska (2014); Romanov (2003); Koźlak (2008)). Thus, we can summarize the elements involved in road freight transport service quality in tangible elements, namely the availability of a modern fleet, new equipment, and technological facilities; reliability of service performance, including speed, accuracy of information, safety, security, and variety of service offerings; responsiveness and empathy; and, finally, social and environmental responsibility).

We emphasize that in the international road transport market in Morocco, price is one of the key factors in the selection of a transport company, but it is not the primary factor for success in the market, nor is it the element or criterion for choosing a carrier. Indeed, European shippers, the main customers for Moroccan operators, are increasingly looking for and demanding a high level of service quality. Thus, in order to be competitive, Moroccan carriers must meet a number of criteria in order to gain market share and survive in the international market, including reliability of delivery times, flexibility in relation to demand, especially for the agricultural sector, geographical coverage at the international level, at least in Europe, the

security of deliveries, information and traceability systems, economic and technical solvency (to avoid discontinuity of services), and finally, additional value-added services such as storage, final distribution, or the management of customs documentation It should be noted that carriers serving Africa still lack a quality and specialized TIRM. Only companies operating in the European market try to respect strict specifications and make quality of service as important as the cost of transport.

Conclusion

After outlining the determinants of competitiveness in road freight transport, we found that it is essentially a question of price and quality of service. Moreover, the "quality of service" dimension is of major importance in this field of application marked by intense national and international competition. Indeed, "quality" allows offering customers a higher value and satisfaction than those provided by their counterparts.

We can thus summarize the elements involved in the quality of road freight transport service in a combination of several elements, namely the availability of a modern fleet, new equipment and technological facilities, the reliability of service performance, including speed, accuracy of information, safety, security and variety of service offerings, responsiveness and empathy, and, finally, socially responsible behavior with regard to safety and environmental protection.

From the results of our study, it arises that the choice of carriers is based on the price of transport, on the reliability of deadlines, on the brand image and expertise of the company, on traceability, but also sometimes on the offer of a logistics service package. The shippers determine and classify these criteria differently according to their needs, their reasoning but also according to their level of requirement.

In the context of the Moroccan IRFT, the quality of the transport service refers to the good quality of the fleet, the reliability of the deadlines and deliveries, the traceability of the journey (thanks to the use of on-board computer tools), the flexibility regarding the demand, the human resources quality and the variety of the services provided.

Furthermore, taking into consideration the lack of empirical research on the competitiveness of international road haulage operators in Morocco and the scarcity of theoretical work in this area, our research work has sought to explore the main determinants of competitiveness in this field and enrich the understanding of the specificities of the Moroccan IRFT market. Our study will allow managers and leaders of Moroccan IRFT companies to focus on these

determinants, informing them on how to develop their competitive level, especially through the improvement of the quality of service offered.

This qualitative study paves the way for further research, namely, the exploration of plausible measures to improve the quality of the transport service offered by Moroccan operators. Thus, it would also be rewarding to study the contribution of human capital development to improving the perceived quality of the transport service.

ANNEX: The interview guides

I. Questions from interviews with IRFT companies in Morocco

Focus of the study	Questions asked
Profile of the respondent	1- Can you introduce yourself?
The determinants of competitiveness	1- What determines competitiveness in the IRFT sector? 2- What are the characteristics of a competitive transport company? 3- What are the components of quality of service at the IRFT level?
The quality of the offer	1- How do you rate your service offering including reliability, safety, environmentalimpact, delivery time, traceability, and customer care? 2- What are the organisational capabilities of your company?3- How satisfied are your customers with your services?

II. Questions from interviews with exporting companies using the IRFT

Focus of the study	Questions asked
Profile of the respondent	1- Can you introduce yourself?
Main requirements and selection criteria	1- What are your requirements of a transport service?2- On what basis do you choose a IRFT company? 3- What are you more interested in, price or quality of service? 4- What is a good quality transport service for you?
Assessment of thequality of theservice provided	1- Do you usually use Moroccan IRFT operators to transport your exports? 2- How would you rate the quality of service of Moroccan IRFT companies? 3- What are the main elements to be developed by Moroccan IRFT companiesfor better service delivery?
Evaluation of the competitiveness of Moroccan operators	1- Are Moroccan IRFT companies capable of competing with European companies today?

III. Profile of respondents

Code	Profile of the interviewee	Organization	Interview mode
R1	Manager	IRFT company	Face to face
R2	Logistics Manager	SNTL Group	Face to face
R3	Director General	IRFT company	Face to face
R4	Manager	IRFT company	Face to face
R5	Manager	IRFT company	Face to face
R6	Manager	IRFT company	Face to face
R7	Manager	IRFT company	Face to face
R8	Director General	IRFT company	Face to face
R9	Director General	IRFT company	Face to face
R10	Director General	IRFT company	Face to face
R11	Director General	IRFT company	Telephone
R12	FREIGHT Manager	3PL	Face to face
R13	Export Sales	Citrus exports	Face to face
R14	Logistics Manager	Textile export	Face to face
R15	Purchasing Manager	Fishing export	Face to face
R16	Manager	Fishing export	Face to face
R17	Director General	Citrus exports	Face to face
R18	Manager	Fishing export	Face to face
R19	Partner	Citrus exports	Face to face
R20	Manager	Citrus exports	Face to face
R21	Customs declarant	Citrus export/ forwarder	Telephone

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