

**UNITED NATIONS
ECONOMIC COMMISSION FOR EUROPE
Inland Transport Committee**

TRANSPORT SITUATION IN BELGIUM / 2007

Updated version June 2008¹

¹ Updated version of the answers to the questionnaire transmitted to UNECE - Inland Transport Committee on December 22, 2007.

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1. TRAFFIC TRENDS

Short qualitative comments on the evolution of traffic volumes / prospects / trends.

1.1. *Passenger traffic in general*

The persistent growth of passenger traffic can be explained by the following elements:

- the growing sub-urbanization;
- the development of the service sector, combined with weaker polarisation of built up areas, especially shopping and industrial areas;
- higher living standard and more leisure time of households ;
- fiscal legislation which has until now remained fairly favourable towards the acquisition of company cars and fuel bonuses;
- the development of Brussels as the national capital and seat of the European institutions, generating employment, but also commuter traffic ;
- the growing complexity of mobility trips ;
- high degree of car ownership;

Congestion - still mild by international comparison - is getting worse around the cities.

The growing traffic also gives rise to serious environmental concern. Air pollution, especially PM, remains a matter of concern, the more so as the 'dieselisation' of the cars in Belgium has gone over the 50%-mark. Belgium must also make major efforts to reduce the CO₂-emissions of transport, which have risen by around 30% between 1990 and 2005.

As people look for alternative means of transport, the sale of motorized two-wheeled vehicles is up and the cycling culture keeps going strong in the northern part of the country, while there is a growing interest in Brussels and Wallonia.

Due to attempts at a more sustainable mobility of the authorities and more client oriented policies of the companies, all modes of domestic public transport are growing steadily.

In conformity with a worldwide trend, air transport too continues to grow in Belgium.

1.1.1. *Car ownership and yearly km/passenger car*

Car ownership remains high: over 5 Mio cars for 10.5 Mio inhabitants. Ever since the year 2000, the BVRI index turns around 133, corresponding to an average of 15,000 yearly km/passenger car; this trend is also observed in other European countries. On the other hand, 70% of Belgian people use their car on a daily basis, compared to only 53% in The Netherlands.

1.1.2. *Public transport*

- Continual growth in the number of rail passengers, as in other forms of public transport, due to government efforts at a modal shift for commuters and a more attractive commercial attitude of the railway company NMBS/SNCB. Between 2000 and 2006 (included) the number of train passengers on domestic connections grew by 45%: from 139.9 to 204 Mio. In 2007 the number of passengers climbed further to a record 206.5 Mio, of which **192.2 Mio**

were transported within Belgium and 14.3 Mio in international traffic (of which Classic international: 5.1, Thalys: 6.1 and Eurostar: 2.2 Mio passengers), somewhat less than the 15 Mio in 2006.

- In 2007 record numbers of passengers were again registered for the Brussels metro, bus and tramway-operator MIVB/STIB: 285 million; the company works at a further capacity boost of 35% by 2011. Between 1996 and 2006 the Brussels public transport company saw the number of its passenger soar from 161.8 million to 269.4 million, up 67 %.
- The same goes for the regional bus and tramway-operator De Lijn in Flanders: between 1996 en 2006 the number of passengers doubled from 214.9 Mio to 463 Mio. In 2007 De Lijn transported a record number of 480 Mio passengers; the pace of growth still stands at 3.6%.
- For the Walloon public transport operator TEC the growth over the past years was substantial, but more modest than in the 2 other regions. The number of passengers reached a record 212.5 Mio in 2006, up 10.8% compared to 2005 and up 32.2% compared to the 160.8 million passengers in 2001.

As a result, the previous loss of market share of public transport is now stopped and the respective public transport companies are all heavily investing in extra capacity.

1.1.3. Air passenger transport

In 2007 passenger traffic at Brussels Airport reached a new momentum after a serious dip in 2001-2002 when the national air carrier Sabena went out of business and in the wake of 9/11 attacks. In 2007 17.8 million passengers transited through Brussels Airport, an increase by 7% compared to 2006. Numbers are further on the rise, but are not expected to reach the number of passengers of 2000 soon (over 20 Mio). Especially in the second half of 2007 Brussels Airport exceeded the European average with growth figures of over 10%. This growth was achieved in all passenger segments and is due to the extended short-haul and long-haul route network and the arrival of several new carriers. The construction of a low cost terminal is announced. In February 2008 the Association of European Airlines (AEA) has released details of its members' punctuality performance in 2007. Just as in 2006, Brussels Airport at Zaventem turns out to be the airport with the lowest delay rate.

Like Brussels Airport at Zaventem the regional airport of Charleroi Brussels South (BSCA) attempts at permanent upgrading, excellent scores for punctuality, safety standards and quality of service. As a result traffic at Charleroi airport grew by 13% to a record 2.5 Mio passengers. In January 2008 a new low cost terminal was opened.

The number of passengers at other regional airports remained stable or continued to grow in 2007: Liège reports 333,000 passengers (up 1%), Ostend-Bruges reports a 23% growth of passenger traffic en now stands at 180,000, Antwerp Airport stands at 115,000 passengers (+18%). All of them are exploring promising niches

1.2. Freight transport in general

Due to the geographical situation of the country - at the heart of major European markets - and its expertise in transport and logistics, goods transport in Belgium is expanding at a steady rate in all modes. Overall traffic volumes are up again in 2007 and - given the growth in the world economy (e.g. in China, Brazil, India) - volumes are expected to continue to grow.

Globalisation of the economy, with its leverage effect on long distance transport, results in impressive traffic growth in the seaports of Antwerp and Zeebrugge. The need to ensure timely distribution of (container) goods to the hinterland gave rise to the concept of considering all inland ports and multi-modal terminals as an “Extended Gateway[®]” network.

Growth in inland transport demand (excl. pipelines) remains primarily attracted towards road haulage (market share +-75%): because of the advantages it still offers in terms of flexibility, reliability and price it is often favoured over railroad (market share +-11%) and inland navigation (market share +-14%). However, freight transport by railroad and inland waterways is steadily expanding. .

1.2.1. Road haulage

The modal share of road transport in the total for inland transport is rather high, compared to other some European countries. In 2006 road haulage (transit included) stood at a record 484.9 Mio tonnes, up 14.9% since 1999; expressed in tonnes/km this corresponds to an impressive: 48.2 billion in 2006, up 14.3% since 1999. In this total for road haulage transit traffic grew by 119% to 40.5 Mio tonnes; this corresponds to 8,1billion tonnes/km, up 192%. In the modal split the part of road haulage has slightly declined since 1999 (-4%) whereas the modal share of inland waterways increased.

Despite efforts made towards a more sustainable modal split, road haulage is expected to continue to grow fast. This is mainly but not exclusively due to:

- The choice of Belgium as European Distribution Centre for the logistics of a great number of multinationals (already over 450 EDC's in 2006) on the grounds of the exceptional location, road network, network of inland waterways and logistics-know how of the country;
- The fast expansion of the ports of Antwerp and Zeebrugge, main gateways to the richest European markets for (container) goods coming from overseas;

In recent years the fierce competition from Eastern European countries has caused a delocalisation of the truck fleet and a turnaround of part of Belgian transport businesses towards logistics management because of higher profitability.

1.2.2. Rail cargo

The performance of B-Cargo, a spin-off of the previous public monopolist NMBS/SNCB seems to suffer from severe competition under the ongoing liberalisation process. After still mitigated results in rail cargo for NMBS/SNCB in 2005 (+1.6%), turnover grew by 6.6% in 2006 to 61.6 Mio tonnes, to fall back again to 57.7 Mio tonnes in 2007. Calculated in tonnes-kilometres the performance corresponds to a consolidation at the best: traffic climbed from 8.11 billion in 2005 to 8.56 billion and remained at 8.1 billion tonnes-kilometres in 2007. This coincided with a financial turnover of the company and a return to (modest) profitability.

In 2007, further public and private initiatives were taken, mainly in the field of international rail cargo. The liberalisation of the domestic market as of the 1st of January 2007 was not expected to have much more impact on traffic volumes than the ongoing trend. However, the number and scale of new initiatives seems to belie this. Newcomers like DLC especially seem to rock the boat; they are specialised in dedicated blocktrains and offer non stop cross border transport (service) by rail. In Belgium they have put rail traffic back on the map as a full equivalent/alternative for transport opportunities. They provide regular and

intermodal transport in Belgium, Holland and Germany and have close partners in Switzerland and Italy.

At the port of Zeebrugge 2007 saw the opening of a direct rail connection to the multi-modal logistic center of Dourges (Nord/Pas-de-Calais Region in France), whereas the port of Antwerp got a new direct cargo connection to Basle and Lyon.

So at last, as of 2006 onward, efforts to increase the part of railroad transport in the modal split paid off and profitability of operations started to improve.

1.2.3. Intermodal transport

The trend remains positive;

- Rail: for the years 2005 to 2007 financial aid has been organized by the authorities for railroad stretches intended for intermodal rail cargo initiatives. In 2007 this resulted in some traffic growth.
- The biggest growth in intermodal rail cargo came from new initiatives by new and existing private operators, a.o. on the axis Antwerp-Lyon and Antwerp-Basle.
- The Swiss combined transport operator HUPAC confirms that the highest rate of growth was seen in non-transalpine combined transport with an increase of 21.9% in 2007 compared to 2006. This segment is boosted by the strong growth in the emergence of traffic in the ports of Rotterdam, Antwerp and Zeebrugge and thus contributed again to the shift of freight transport from road to rail.
- Air: the interface air cargo/inland transport remains monopolised by road haulage. However, a study is underway in the Walloon Region with operators of Aéroport de Paris on the feasibility of HST/Freight-feeding and heavy investments in better rail connections at Brussels Airport – the so-called Diabolo-connection - are expected to pay off in the future.

1.2.4. Inland navigation

Inland navigation is significant in Belgium and has reached a modal share of 14% in tonnes/km and of 24% in volume in 2006. In that year 166,4 Mio tonnes of goods were transported by inland waterways, on a total of 713.5 Mio tonnes for inland transport, up 50.9% since 1999. Expressed in tonnes/km inland navigation stood for 8,9 billion tonnes/km on a total of 65,7 billion tonnes/km, up 39% since 1999². Further growth was noted in 2007.. This makes inland navigation the fastest growing transport modus in Belgium.

- By the end of 2005 the number of vessels in Belgian inland navigation was 1,600 with an average loading capacity of 1,186 tonnes, to be compared with an average of 840 tonnes in 1991;

- Thanks to infrastructure works by regional governments and new industrial opportunities, stimulated a.o. by European incentives such as the Marco Polo- and Naïades-programmes, further growth is expected. Without such measures or major infrastructure works, further growth would be hampered;

- Due to globalisation of the world economy and the explosion of container traffic in the seaports, the relationship between the seaports and the inland ports has changed; their activity seems to be more intertwined; inland navigation is seen as a major solution to keep the Belgian seaports congestion free;

- Traffic at the 13 inland container terminals – of which 3 dedicated terminals in the seaports - grew steadily (tenfold growth over the past decade);

² www.statbel.fgov.be

- The inland ports of Liège and Brussels flourish again as they are gradually turned into multi-modal hubs. Liège is the third European inland port after Duisburg and Paris. No less than 15.79 Mio tonnes of cargo transited through the port in 2007, up 9.54 % over the volume transported in 2006. All modes of transport confounded (rail, road and ship), the Liège multimodal hub Trilogiport registered a record cargo volume of 21.24 Mio tonnes, a 6% increase over 2006. In the inland port of Brussels global cargo traffic grew by just 0.4% to 7.4 Mio tonnes, but the own traffic (volumes treated on the quays of the port increased by 3% to 4.3 Mio tonnes which is proof to a favourable economic development (added value of the port traffic climbed by 33% since the year 2000). There was a drop in SSS notwithstanding the ambition of the port of Brussels to attract new short sea traffic.
- The new estuary traffic of river-sea going vessels at the port of Zeebrugge is expected to give a further boost to inland navigation.
- 2006 saw the ratification of the CMNI-treaty and a whole range of initiatives for administrative simplification; in 2007 implementation was started up.
- Investment in CCRII-motors is encouraged in the Naiades-context;
- Bundling of traffic should improve efficiency and profitability, as should further improvement of professionalism.

1.2.5. Maritime transport

General trend

Steady growth, also of short sea shipping (SSS).

Traffic growth in the port of Antwerp continues steadily, whereas the deepsea container port of Zeebrugge again shows exceptional growth of turnover in 2007. After a previous dip the port of Ghent ensured new traffic growth in 2006-2007, as well in inland navigation as in maritime traffic.

Where container transport is concerned, SSS is bound to become an ever more important feeder in international maritime traffic as ports are increasingly confronted with the gigantism of ships (up to 13,000 TEU). For the ports in the Hamburg-Le Havre range the main challenges lie in providing adequate access through a better draught and optimal mobility, supply chain management and logistics in the hinterland.

Short Sea Shipping³

In 2007 total SSS traffic in the Belgian seaports amounted to 130 Mio tonnes. Average growth in 2007 was 7.3% over 2006 and of 46% since 1999⁴. With a turnover of 81.4 Mio. tonnes (+11.37%) the port of Antwerp witnessed the largest increase in 2007, while Ghent realized a 6.96% shortsea growth and stood at 12.3 Mio tonnes. Ostend, traditionally a shortsea port, hit the 8 Mio tonnes mark (+ 2.28%). With a turnover of 27.5 Mio tonnes the deepsea port of Zeebrugge was the only port that showed a relative drop in its shortsea traffic in 2007, but then it stood at 79% of total traffic in 2006, while other types of maritime traffic in the port are growing faster.

The ports

- **Antwerp** is doing very well amongst the ports in the Hamburg–Le Havre range. In 2007 the port handled almost 183 Mio tonnes of freight. This represents growth of 9.3% compared with the 167 Mio tonnes in 2006. The main engine of growth is general cargo, with a sharp rise in container volume yet again. The volumes of ro/ro and conventional breakbulk too show good

³ Figures Eurostat

⁴ Source : SSS Vlaanderen

growth figures for 2007. The container volume in Antwerp is rising almost twice as quickly as the overall freight volume, with an increase of 17%, to 94.5 Mio tonnes. In terms of TEU the growth works out at 16.5%, with a total volume of almost 8,2 mio TEU. The ro-ro-traffic reached a volume of 4,44 mio. tonnes (+14,7%) and the general cargo 19,8 mio. ton (+7,6%). There was some loss of traffic in the bulk goods; for the dry bulk this loss amounts even to 10%, a regress not entirely compensated by the growth with 1,9% of the liquid bulk..The number of seagoing ships calling at Antwerp increased tot 16,689, significantly more than the 15,770 in 2006. The gross register tonnage is also up by 8.9% to an average of 288..8 mio GRT in 2007.

- Another Belgian port with strong growth amongst the ports in the Hamburg - Le Havre range is the deep seaport of **Zeebrugge**; by the end of 2007 total turnover stood at a remarkable 42.3 Mio tonnes (+7.3 %), compared to the previous record of 39.3 Mio tonnes in 2006. Container traffic grew by a spectacular 25.6% in 2007 to a volume of over 2 Mio TEU, compared to 1,64 Mio in 2006 . After some years of limited growth the ro-ro traffic also registered a substantial growth in 2007. A total volume of over 13 Mio tons was noted down (+ 6.5 %). Last year 1,020,000 trucks passed through Zeebrugge (+ 5.5%). Car port Zeebrugge remains the absolute leader with no less than 2,220,000 new cars in 2007 (+14.8 %). The liquid bulk decreased to 5.8 million tons (-7.2%). In 2007 a total number of only 33 LNG vessels called at Zeebrugge instead of 56 vessels in 2006. As in 2008 the fourth LNG storage tank of gas distributor Fluxys will become operational, this number is expected to increase again.

Regarding the accessibility of the port over land, steps are being taken in 2008 to further improve the connections by road, rail and inland navigation. Furthermore, the first estuary container vessels are being deployed in 2008.

- Progress also in the **port of Ghent**, a multi-purpose "inland" seaport offering well equipped terminals for handling and storing a vast range of commodities and cargoes. Its nautical access goes up to Panamax-type vessels of 80,000 dwt. In all, Ghent seaport handles around 45 Mio tonnes of water-borne cargo a year, of which two thirds are transported overseas and one third via inland waterways. Overall traffic grew by 4% in 2007. Container traffic was up 67.5% in 2007. The port of Ghent has good connections by sea, inland waterway, rail and motorway as well as by pipeline. The port is currently developing 480 ha of industrial ready-to-build land in the vicinity of the new Kluizendock.
- The **port of Ostend** is doing well again after a serious dip and hit the 8 Mio tonnes-mark in 2006. In 2007 traffic growth stood at 2,5%, while container traffic slowed down (-43.6%). In the forth quarter of 2007 no containers were handled any more. By the end of the year a new double deck berth for the loading and unloading of ro-ro-ships was taken into service.

Container traffic in the ports

- In 2007 total container traffic in the four Flemish maritime ports grew by 17 % over 2006 : : +17% in the port of Antwerp, + 25,6 in Zeebrugge, +67,5 % in Ghent , but -43,6% in Ostend.

Fleet

- Furthermore, the Belgian fleet under Belgian Flag kept its capacity of 6.5 Mio tonnes (dwt) in 2007, up from 1.5 Mio tonnes in 2004 (17th in de world ranking). This is still only 51% of the total fleet under Belgian ownership.

1.2.6. Air cargo

Steady growth in 2007:

- With 783,727 tonnes of cargo handled in 2007 (+8.9%) Brussels Airport maintains itself among the top 5 of European cargo airports and scores above the average growth rate in Europe. In this segment the full-freight market accounts for 310,000 tonnes (+14%), courier services for 381,000 tons (+2%) and passenger flights (belly load) for 92,000 tons (+25%). The cargo activities in 2007 showed a marked shift from night-time traffic to day-time traffic. The strong annual expansion of air cargo in Brussels is expected to slow down somewhat by 2008, when DHL will move the bulk of its night flights to Leipzig (Germany) as further expansion of night flights in Brussels is limited due to population density and sub-urbanisation;
- Furthermore, cargo activity on the regional airports of Liège-Bierset (490,000 tonnes of cargo in 2006, up 24%) and Ostend-Bruges (109,000 tonnes in 2007 compared to 98,500 tonnes in 2006, up 10,6%) grows steadily again.

2. OBSTACLES TO THE DEVELOPMENT OF TRANSPORT

2.1. General obstacles

A general “obstacle” to a fast and unlimited development of transport is its ever more unacceptable pressure on the environment, broad sense, up to climate changes. To face this, Belgium has to comply with obligations under the Kyoto Agreement and other environmental constraints (EU-directives on clean air; Natura 2000-areas, etc.) Moreover the protection of safety, the health and living conditions of the people living in the vicinity of transport infrastructure is a growing matter of concern.

Other more specific obstacles are:

- The intricacy of the Belgian political system, with a split up of responsibilities between the EU, the federal and the regional governments and the local authorities;
- Some lack of coherence between policies in the field of transport & mobility, environment and fiscal policy;
- The unfinished liberalisation of transport at the European level, preventing an evaluation of the real strength of the underlying market trends and thus of a reorientation of policies in the field of transport and logistics;
- More than ever, the exiguity of the territory combined to the high density of the population and decades of sub-urbanization limits the growth of night flights at the airports and creates scarcity of land for further development of massive transport infrastructure in general;

2.2. Road transport

Road congestion, especially around Antwerp and Brussels, though mild in comparison with neighbouring countries, is an obstacle to further traffic growth. For the main cities, the high rate of car use for daily shuttle causes worrying congestion peaks. The intensity of traffic on some highway trunks is equally problematic.

Part of the solution for the congestion problem might come from road pricing and congestion charges. For a time the dispute at the European level over the choice between the different systems – Eurovignette, kilometer-bound tariff for trucks, road pricing for all with environmental criteria - was mirrored in the different options taken by the autonomous Belgian regions. Early in 2008 the beginning of an agreement was reached at the Benelux-level: starting 2011 an advanced electronic road pricing system will be introduced for heavy trucks with a cost variable on the basis of their “ecoscore⁵.”. It is in this context that Belgium is facing the elaboration of a coherent and comprehensive road pricing policy of its own in the absence of a coherent policy for all EU-member countries.

Fierce competition from Eastern European countries increasingly leads to delocalisation of the truck fleet and/or transport business, especially in long distance haulage. Problems of “shortage of wheels and truckers” lie at the basis of the turnaround of part of Belgian transport businesses towards logistics management.

A problematic evolution is the growth in recent years of heavy transit traffic on toll free Belgian roads, mainly trucks to the Channel and the ferries in Calais (Fr.) as links from the

⁵ [Ecoscore includes criteria for noise, air pollution, carbon emission, etc..](#)

northern European ports to the UK are shifting from unaccompanied traffic to accompanied traffic now that large haulage companies are hiring dozens of cheap drivers from Eastern European countries (after a growth of +150% between 2000 and 2003, this traffic grew by another average 10% between 2003 and 2006 and is still going strong). This trend clearly goes against EU-promotion of the "Motorways of the Sea".

2.3. Rail

- Due to previous investment deficit and given the density of the Belgian railroad network, there are a few bottlenecks in the passenger traffic to and from Brussels and in the freight transport to and from the ports.
- The reliability of rail cargo systems and the traceability of goods remains the main challenge for combined rail/road haulage transport systems. This reliability depends on all operators in these mainly international supply chains.
- Within Belgium the priority of passenger traffic over freight regularly gives rise to problems due to shortage of tracks on some crossings and also due to lack of dedicated traction capacity for freight.
- Another obstacle to be overcome is the lack of interoperability of personnel and infrastructure in international rail traffic.
- Finally, due to environmental concerns of The Netherlands there is some delay in the reopening the Iron Rhine-railroad linking the port of Antwerp to the industrial area of the Ruhr in Germany. Alternative solutions suggested by the German authorities seem to have a fair chance of receiving the backing of both The Dutch and Belgian governments and of the port authorities of Rotterdam and Antwerp alike.

2.4. Inland navigation

The pace of growth is hampered by severe competition and the low profitability poses a threat to the renewal of the fleet.

2.5. Maritime transport

- The EU-habitat and birds-directives and tensions with The Netherlands over the dredging of the river Scheldt to a deeper draught used to complicate further expansion of the port of Antwerp, but an agreement was reached by the end of 2007 and work has started;
- Due to traffic growth there is increased risk for port congestion as hinterland connections begin to reach their maximum capacities; however, in 2007 there were some interesting initiatives in the field of container traffic to the hinterland over inland waterways and railways.
- Speaking in terms of competitiveness, SSS still suffers from administrative burdens when compared to road traffic, slowing down the pace and/or reducing the smoothness of SSS traffic flow;
- Maritime and inland containers are still based on different standards, impairing their interoperability.

2.6. Air transport

Sub-urbanization and the proximity of Brussels hinders further expansion of night flights at Brussels Airport. On the other hand, unlimited and fast growth of air transport causes an insuperable problem of compatibility with the Belgian and European agreements on greenhouse gas emissions.

3. BEST PRACTICES IN TRANSPORT REGULATION AND INFRASTRUCTURE

3.1. Option for sustainable mobility

In principle, authorities at all levels are in favour: EU, Belgium, Regions, local authorities.

3.2. Regulatory framework

Regulations influencing modal split

In order to combat congestion on the road during peak hours, the federal government offers free public transport to civil servants and subsidizes part of the public transport fares for commuting workers in the private sector. Due to this initiative a fair percentage of workers have already switched to train, bus, tramway or metro.

Authorities at all levels also stimulate the new cycling culture: on a daily basis Belgian households make over a million cycling trips, mainly trips to school, work or shopping.

EU-rules on the liberalisation of the use of railroad infrastructure

The progressive access for new operators favourably influences total rail traffic offer. National operators fear cherry-picking amongst the more profitable operations and lines, However, recent developments (abroad) show that a new market does exist, even for diffuse traffic. The potential of rail transport is very high due to the combination of the growth of total transport volume and the unavoidable modal shift that will profit to the railways. The actual challenge will be the sharing of transport capacity and the fight against bottlenecks in rail infrastructure (see above).

Regulations influencing road security

In conformity with EU-policy, the traffic code and transport regulations were made more stringent and police/camera controls intensified in order to further reduce the number of casualties on the Belgian roads. This policy proves successful as the number of people killed in road traffic has dropped significantly between 2000 (+-1500) and 2006 (+-1000). However, the pace at which the number of accidents and casualties comes down seems not to have come to a halt in 2007.

Environmental regulations

- In order to reduce CO₂ emissions, Belgian government offers a immediate 15% rebate⁶ on the cost of a new car with CO₂-emissions under 105 gram per km. For cars with CO₂ emissions under 115 gram per kilometre the rebate is 3 %.
 - In 2007 a new regulation was introduced linking the fiscal advantage for fleet cars according to the quantity of CO₂ emission per km.
 - A rebate of 200 EUR is offered for new cars equipped with a soot filter.
- Up to now, the success of these measures is quite modest.

⁶ Before 2007, the rebate was paid 1 or 2 years later.

3.3. Upgrading of infrastructure & filling in of missing links

Road infrastructure and ITS⁷

In general, road infrastructure remains among the best in the world.

The Flemish Region plans to fill in a number of missing links, especially in the hinterland of the ports of Antwerp and Zeebrugge.

In 2006 the Walloon region launched a pilot project whereby fast bus services could make use of adapted stretches of the emergency lane on the highway to Brussels; a positive evaluation of this project is expected in the near future. A similar project in the Antwerp region by the Flemish Region has been continued in 2007.

Belgian regions together with other European regions participate to the ITS "Easyway" project which aims at the 2020 horizon to improve traffic flow by a 25% congestion reduction; to increase traffic safety by 25% less fatalities; to improve the environment through limiting the traffic emission by 10%.

Rail

The density of the Belgian railway network figures amongst the highest in the world. In recent years the firm option has been taken to upgrade the main rail connections that are part of the Trans-European Network and to fill in some missing links. In 2007, Belgian railroad projects have been selected as TEN priority projects by the EU⁸ :

- The Diabolo project will connect Brussels airport to the High Speed Train network
- Eurocaprail will improve the Brussels-Luxembourg link and reduce the travel time by 20 min for international passenger train.
- Iron Rhine project will improve the freight rail connection between Antwerp and the Ruhr area in order to cope with expected exponential growth of container traffic in the hinterland of the port of Antwerp.
- The "Liefkenshoek tunnel" project - not a part of the TENs network - follows the same objective. The tunnel under the Scheldt river will improve the rail connection of the new multi-modal terminals of Antwerp.
- Moreover the decision by Infrabel – responsible for rail infrastructure - to put in place the ETCS for the main railroad network is expected to heighten the capacity and the safety of rail traffic; work has already started on the HST-lines and is expected to last until 2012.
- The recent option by the Regions to promote and expand plant sites with a rail siding ought to contribute to the growth of railroad cargo;
- In 2007 major works at the suburban railroad around Brussels continued; this so-called GEN-project is mainly intended at commuters and should alleviate congestion of motorised traffic in the Brussels area by 2012.
- Rail passenger tariffs: in 2006 new agreements between the authorities and the rail road operators have led to simplifications and some common ticketing with other forms of public transport like the Brussels underground and regional bus and tramway companies; existing special tariffs and free travel have been extended to new social and age groups.

Inland navigation

Multi-modal hubs are being created as a hub-and-spoke network around the ports and the main logistic centres: 11 of these multi-modal terminals have been developed over the past ten years; together with the inland ports they form a system of extended gateways in the hinterland of the seaports. Especially the terminals along the Albert Canal between Antwerp

⁷ Intelligent Transport System

⁸ These projects will be partly financed by the EU.

and Liège are booming. Also, the port of Liège is developing a huge multi-modal logistics platform called Triligiport in cooperation with the port of Antwerp.

More emphasis on safety and renewal of the fleet; inland navigation also profits from huge investments by the regional governments in quays along waterbound industrial sites; 60 of 119 projects are already operational.

- Development of standards for river-sea coasters: in order to decongest road traffic around maritime ports and to link them to inland waterways use is made of river-sea going vessels for estuary traffic.
- In December 2007 came the EU-decision to finance the upgrading of the main canal connecting the Belgian and French inland waterways in the Seine and Scheldt basins (Seine-Nord project) as part of the Trans-European Network. In this context the Flemish authorities took the firm option to fill in some missing links in the hinterland of the ports of Zeebrugge and Ghent.

Maritime transport

In 2007 the region of Flanders undertook to pay the additional construction costs for a tunnel under the canal Ghent-Terneuzen near Sluiskil (The Netherlands) calculated to accommodate a future draught of 16 metres. These extra costs are estimated at EUR 24.4 mio. Replacing the bridge at Sluiskil by a tunnel is the first decision to be taken for improving nautical accessibility to the port of Ghent. A new ro-ro berth and a new sand and gravel terminal became operational in the port of Ostend.

Belgian ports in general are being better integrated with the road and rail networks and, as such, are becoming prime examples of multi-modality; missing links are often being built through public-private cooperation. (Cfr. the concept of extended gateways in the § on inland navigation)

The ports fully play their role as main SSS-hubs in the EU-project "Motorways of the Sea".

Air transport

Brussels Airport at Zaventem and Brussels South airport at Charleroi, both have received upgraded railway connections in 2007; their ambition is to become multi-modal hubs, both for passenger traffic and high value cargo.

In 2007 permanent upgrading of infrastructure, safety and service levels in all Belgian airports was intensified further.

3.4. Technological progress

Being a small open economy and transit country, Belgium hopes for progress in the GALILEO-satellite navigation programme of the EU as a key instrument for the development of an intelligent, safe and efficient transport system in Europe;

The country also favours the speeding-up of the introduction of advanced telematics in the transport sector, both for reasons of road safety and traffic management.

E-government: there is a strong trend towards administrative simplification and paperless customs.

3.5. Information needs

Belgium, that makes an effort at its own level, sees the need for and favours adequate, reliable, swift, and homogenous international statistics on transport and mobility, and expects initiatives at EU- and/or UNECE-level.

Sources

Data and figures collected from the website of the Belgian Federal Ministry of Transport and Mobility: www.mobilit.be and from the websites of: Eurostat, National Institute of Statistics within the Belgian Ministry of Economic Affairs, Belgian Federal Planning Bureau, the Flemish Region, SERV, Short Sea Shipping Vlaanderen, Promotie Binnenvaart Vlaanderen, Vlaams Instituut voor Logistiek VIL, ports of Antwerp, Zeebrugge, Ghent, Ostend, Brussels, Liège, the public and private public transport companies NMBS/SNCB, DLC, HUPAC, De Lijn, MIVB/STIB, TEC, the airports of Brussels Airport, BSCA, Antwerp Airport, Bruges-Ostend Airport and air carrier Brussels Airlines and finally the professional transport publication De Lloyd.
