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**Review of the transport situation in UNECE member countries
and emerging development trends: Review of the transport
situation and emerging trends in ECE region**

Review of the transport situation in UNECE member countries and of emerging development trends

Report by the secretariat*

I. Introduction

1. The Inland Transport Committee's (ITC) terms of reference include the analysis of transport trends, policies and economics (ECE/TRANS/97, annex 2). At its seventy-second session (23–25 February 2010), the ITC reviewed the transport situation and emerging trends in 2009 and asked the secretariat to write a similar report in 2011, also containing relevant information from the regions neighbouring the ECE region.

2. This document describes the main economic and inland transport developments in the UNECE area and its neighbouring regions in Asia and the Mediterranean. It also considers some policy responses to challenges facing transport, particularly, in view of the fragile economic recovery that has followed the latest global financial crisis and subsequent economic downturn. Figures and information presented reflect both data as published in December 2010 and responses received to a questionnaire sent to the ECE member States.

* The present document was submitted late due to delayed inputs from other sources.

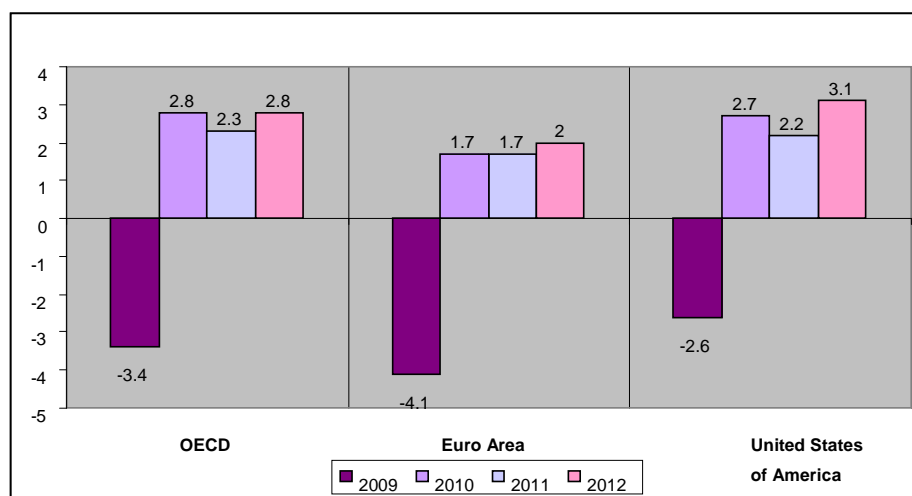
II. Economic and transport trends in the ECE and neighbouring regions

A. General economic situation and trends

3. In 2010, all major economies in the ECE region registered moderate, albeit encouraging, Gross Domestic Product (GDP) growth, as compared to the severely depressed levels of growth in 2009. Fiscal challenges in advanced ECE economies along with the Euro-area crisis have resulted in slower overall GDP growth in Western Europe and North America compared to emerging market economies in the ECE region. As seen in chart 1, the Euro-zone area grew by 1.7 per cent (%) in 2010 after a 4.1% contraction the previous year. The United States of America averaged slightly better, with growth reaching 2.7% compared to 2009. In the other ECE subregions, economic upturn has been on average stronger than in the economies of Western Europe and North America. This was because of the performance of the economies of the Russian Federation and Turkey as well as the improved prospects of Bulgaria and Romania. However, economic growth was uneven with sharp cross-country variations throughout the area and a number of economies continued to contract.¹ In view of the UNECE countries' economic performance in 2010, pre-crisis GDP growth rate levels in these are projected to be reached gradually over 2011 and 2012.

Chart 1

GDP percentage change from previous year, OECD Projection



Source: OECD Economic Outlook and Projection, November 2010

4. According to the World Trade Organization (WTO), international merchandise trade was expected to recover from the 2009 contraction and grow by 13.5% in 2010 (in volume terms). However, WTO estimated in December 2010 that the value of world merchandise trade (in nominal terms) was still below pre-crisis levels. These estimates indicate that the

¹ "The World Bank in Emerging Europe and Central Asia"; www.worldbank.org/eca.

volume of merchandise exports of emerging market ECE economies and the countries of the Commonwealth of Independent States expanded by 16.5%, as opposed to 11.5% for Western Europe and North America. Due to the potential impacts of uneven economic recovery on trade patterns and the sustained fragility of financial markets, aggregate demand is expected to be affected in 2011, resulting in a deceleration of growth in world trade volumes.

5. Notwithstanding positive trends in global recovery from the crisis, unemployment rates remain persistently high in a number of ECE economies of Eastern Europe, the Caucasus and Central Asia and in Central Europe and the Baltic States. Notably, unemployment continues to rise particularly in the countries of the Commonwealth of Independent States (CIS). This creates significant discrepancies between growth rates and recovery of jobs lost during the recession. As a result, employment levels may not return to pre-2009 levels until 2012.² This contrasts with the emerging situation in the European Union (EU) and the United States of America where unemployment rates are starting to fall and stabilize despite lower growth rates.

6. With regard to neighbouring Mediterranean countries in the Middle East and North Africa (MENA), growth was not severely affected by the global economic and financial crisis, largely due to the limited international financial linkages. GDP growth in these countries noted an overall slowdown in 2008 and 2009 compared to preceding years, but with signs of an upturn in 2010. Projections by the African Development Bank and the World Bank indicate a steady recovery and return to pre-crisis growth rates in 2011. The main implications of the global financial crisis and economic downturn in the MENA region were that remittances and foreign direct investment flows declined. Furthermore, industrial production noted a slowdown in 2009 and early 2010, due in particular to a drop in Europe's import demand for goods originating in the MENA region.

7. Asia's export oriented economies neighbouring the ECE region were disrupted by the recession resulting in regional growth slowdown in 2009. The People's Republic of China and India, despite noting a decrease in growth in 2009, enjoyed a higher than anticipated rebound in exports in 2010, thus making them the leading Asian economies and the main drivers of the global recovery. Hong-Kong (Special Administrative Region) has made an impressive bounceback from negative growth in 2009 largely due to a rapid expansion of international trade in 2010, which is however expected to slightly decelerate in 2011. Japan was impacted as it continues to struggle with high public debt. Its growth will be restrained in the coming years (2011–2012).

B. Transport economics and trends

1. Rail freight transport in the ECE and neighbouring regions³

8. According to most recent data, rail freight volumes in the second quarter of 2010 for the EU area were on average 15% below pre-crisis levels. During the same period, rail freight volumes in the United States of America and the Russian Federation were slightly more elevated by comparison to the EU total, with 8% and 9% below pre-crisis levels respectively. Turkey's expanding trade with Central Asia and the Caucasus has led to an increase in wagonload freight traffic. By May 2010, this traffic increased by approximately 18% over the same period in 2009.

² World Bank/IMF Economic Update, October 2010 www.worldbank.org/eca.

³ Information on neighboring regions is subject to data availability.

9. Container traffic on the rail between Europe and Asia accounts for roughly 3–4% of the total volumes — principally from Northern China and Korea. Traffic on the Russian Railways (RZD) fell by 15% in 2009, but in recovery it increased by almost 9% in the first nine months of 2010 as compared to the same period of 2009. Data for the first half of 2010 indicates that wagonload freight traffic, measured in tonne-km, increased by 12.2% compared to the first half of 2009.

10. To address issues of inadequate transport infrastructure, internationally unharmonized transport rules and cumbersome, costly and time-consuming border crossing procedures, the UNECE works closely with 27 Governments of the Euro-Asian region under the Euro-Asian Transport Linkages (EATL) Project. The project is now at its second phase, and significant progress has been made with regard to transport infrastructure by identifying priority routes and projects for coordinated development and cooperation. According to information available in January 2011, 144 priority railway infrastructure projects have been identified, requiring almost 42 billion United States dollars of investment.

11. As of October 2010, the rail tunnel that goes through the Gotthard massif in southern Switzerland is now the world's longest, at 57 kilometres. The tunnel, which is due to open to rail traffic in 2017, was delivered both on time and on budget. The total cost of the project was 9.74 billion Swiss francs. The Gotthard base tunnel will be immensely important for the new flat rail link through the Alps and is considered a breakthrough in the development of European transport infrastructure. It will also be used to move freight in particular from road to rail.

12. Total intermodal road-rail freight transport noted an overall 17% decline in 2009 (measured in tonne-km) compared to 2008 (International Union of combined Road-Rail transport companies (UIRR)). The International Union of Railways (UIC) estimated that in 2009 the number of intermodal block trains over the European rail network were by 7.4% fewer compared to before the crisis (2007). Yet, preliminary statistics as of October 2010 by the UIRR have increased expectations for a dynamic recovery in 2010 even though final statistics have yet to be compiled.

13. China operates the world's longest high-speed rail network, with 7,500 kms of rail lines. In 2009 China noted an increase of 4.3% in rail passenger and 1.9% in rail freight transport. By contrast, in North Africa, rail networks have essentially not developed since the colonial period and are affected by minimal investment and no maintenance. In the Middle-East ambitious investment plans have been endorsed to develop railway lines first of all to serve the growing number of pilgrims.

2. Road Freight Transport in the ECE and neighbouring regions⁴

14. International road freight transport output shrank by about 30% in 2009, thus making it the transport mode the most hard hit by the economic downturn. In 2010 road freight volumes recorded an average growth of 10% as compared to 2009, but still remain below the pre-crisis peak. In the first half of 2010, road freight volumes in the EU area were still 14% below pre-crisis levels. The Russian Federation by the end of the second quarter of 2010 had achieved a 15% increase in road freight volumes, while still remaining 10% below the pre-crisis levels. The slow but steady increase of road freight transport is also reflected in the number of TIR carnets issued in 2010 which increased by over 25% compared to 2009. However, this number which amounts to approximately 2.8 million TIR carnets is still below the pre-crisis level.

⁴ Information on neighboring regions is subject to data availability.

15. In spite of progress made in recent years, road transport infrastructure in the Eurasian area is not yet fully developed. The condition of road networks is poor in many parts of the Euro-Asian routes, most roads are not built to support the heavy volumes of trucks now using them and there are bottlenecks and missing links. Under the EATL phase II project, over 190 priority road infrastructure projects have been identified, amounting to a total cost of 112 billion United States dollars. While some of these projects have secured funding, further efforts are required to ensure the development of the remaining priority projects.

16. Road freight transport is hindered by high operating costs in North Africa – road freight in Africa is as much as four times more expensive than anywhere else. In the People's Republic of China and in India, road transport is rapidly developing with an expected increase of road haulage at an annual rate of 8.5% and 12% respectively until 2014.

3. Passenger transport

17. Rail passenger traffic continued to face the modal-shift challenge in the whole ECE region in 2010. However there are some positive exemptions, e.g. the growing share of high speed rail traffic Rail - passenger transport between Europe and Asia on the lines operated by Russian Railways (RZD) declined by 3.3% by November 2010 compared to the same period of the previous year.⁵

18. Road is the dominant mode in both private and public passenger transport in the ECE region. In public transport, buses and coaches account for 55% in most part of Europe (EU 27 and EFTA), and over 45% of passenger transport in Turkey. In the United States of America in the first nine months of 2010 unlinked transit passenger trips were down by 1% as compared to the same period in 2009 (American Public Transportation Association (APTA)). This contrasts with the situation in Canada where the use of public transportation increased by 4% in the first nine months of 2010 over the same period of 2009.

4. Inland waterways transport

19. The global economic downturn also had an impact on Europe's inland water transport. Within the EU, inland navigation holds a share of 5% of freight transport. Despite demand for inland waterway transport noting a positive trend in 2010, freight rates and volumes remain significantly lower than pre-crisis levels leading to capacity underutilization and higher operating costs. In 2010, three times fewer cargo ships entered into service compared to 2009.⁶

20. As regards Europe's inland waterways' container traffic, Danube countries such as Croatia, Hungary and Slovakia experienced steeper declines in 2009 as compared with Rhine countries (France, Germany, and the Netherlands). In the short-term, demand for container transport on the Danube is not expected to show significant increase. However demand for passenger transport and especially river cruising on the Moselle, the Main, the Elbe, the Rhone and the Seine in addition to the Danube and the Rhine has shown an upward trend in 2010.

21. The world's largest inland waterway system is in China, with navigable waters exceeding 110,000 km and more than 2,000 inland ports. In China's busiest river by cargo

⁵ According to the press release "Yakunin says 2010 saw stabilization of the industry" published by Russian Railways on 22 December 2010, available at www.eng.rzd.ru/isvp/public.

⁶ "Market Observation Report" 2010-1 and 2010-2 Central Commission for the Navigation on the Rhine and the European Commission Directorate-General for Energy and Transport.

volume (the Yangtze), freight was estimated at 1.2 billion tonnes in 2009. Preliminary statistics for 2010 indicate an increase to 1.34 billion tons.

III. Selected transport issues in the ECE region and some policy responses

A. Road Safety

22. Road fatalities exceed 1.3 million annually worldwide. This includes close to 127,000 lives lost in the ECE region. Pedestrians, cyclists and motorcyclists account for almost half of those killed on roads every year. Though overall fatality rates in the ECE region have been consistently falling over the course of the past two decades, as can be seen in chart 2 below, in certain subregions numbers are still persistently high. The higher income UNECE countries tend to have lower road fatality rates, with numbers decreasing in West European and other EU countries and increasing in Eastern Europe and Central Asia for the period 1999–2009 (chart 2).

23. According to an estimate of road fatalities by the National Highway Traffic Safety Administration (NHTSA) of the United States of America, in the first 3 quarters of 2010 approximately 24,460 people died in motor vehicle traffic crashes in the United States, a 4.5% decline as compared to the same period of 2009. In the EU-27, as many as 34,500 people died in road accidents in 2009. The 2010 objective was that the number of fatalities would not exceed 27,000 however data for 2010 are not yet available. Under the new European Road Safety policy for 2011–2020, the proposed target is to half the number of fatalities below the 2010 level.

24. Most UNECE member States have a road safety policy, fatality reduction targets and a lead agency to coordinate activities and to monitor progress. Increased enforcement efficiency and stricter penalties for traffic violations are identified as key priorities in a number of National Road Safety strategies and Action Plans in the ECE region. The Russian Federation, within the framework of its federal road safety programme is promoting stern measures to enforce compliance with traffic regulations, especially with regard to motorcycles. In Armenia the central element of the recently enacted “National Road Safety Strategy” (2009) is the enforcement of seatbelts, while in Turkey one of the major challenges is tackling red-light violations. In some UNECE countries such as Iceland, speed violations have been addressed most successfully with the introduction of speed cameras while in others such as the Czech Republic and Latvia, the penalty point system has been more effective in reducing speed violations and drink driving.

25. Hungary saw a reduction of road deaths from 1,239 deaths to 822 between 2001 and 2009 thanks to the implementation of strict and consistent road safety measures. The introduction of the owner responsibility for speeding offences, the drastically increased penalties for major traffic offences, the zero tolerance policy for drink driving are among the measures used to achieve a 50% death reduction target outlined in the National Road Safety Program for 2011–2013. Road safety is one of the priorities of the Hungarian presidency in the EU in the first six month of 2011. The EU has continued to spearhead the improvement of road safety, the “Policy Orientations on Road Safety 2011–2020” were approved by the Ministers in 2010. One of the new elements is the strengthening of enforcement of road traffic rules across the borders.

26. Road users’ behaviour is not only a matter of law enforcement, but is also dependent on awareness of potential dangers and traffic education. Croatia, Germany, Latvia and the United Kingdom of Great Britain and Northern Ireland among others have promoted continued campaigns and traffic education in schools. The United Kingdom, by

implementing its comprehensive ten year road safety policy, is one of the few countries whose national targets were timely and successfully met in 2010 with overall fatalities having decreased by 44% and child fatalities by 61%.

27. Well-built road infrastructure and safe vehicles are a primary objective for many UNECE countries. Road safety audits are routinely performed on new and existing roads in the majority of UNECE member States. In Turkey, among others, the construction of motorways with safety standards has made a substantive contribution to road safety. Norway, envisages road transport with zero casualties (“vision Zero” road safety strategy), and is making large-scale investments in road infrastructure and vehicle safety inspections in order to minimize the number of serious accidents.

28. The UNECE Transport Division has pioneered road safety activities for the past 60 years with a view to assisting its member States achieve their road safety targets. This is accomplished through developing and updating the UN Road Safety Conventions (e.g. Vienna Conventions), promoting the harmonization of traffic regulations and supporting measures for the construction and technical inspection of vehicles. UNECE holds a key role in the implementation of the Decade of Action for Road Safety, an initiative taken by the UN General Assembly in March 2010, aimed at strengthening action of the international community to reduce deaths and injuries from road traffic crashes worldwide over the next ten years.

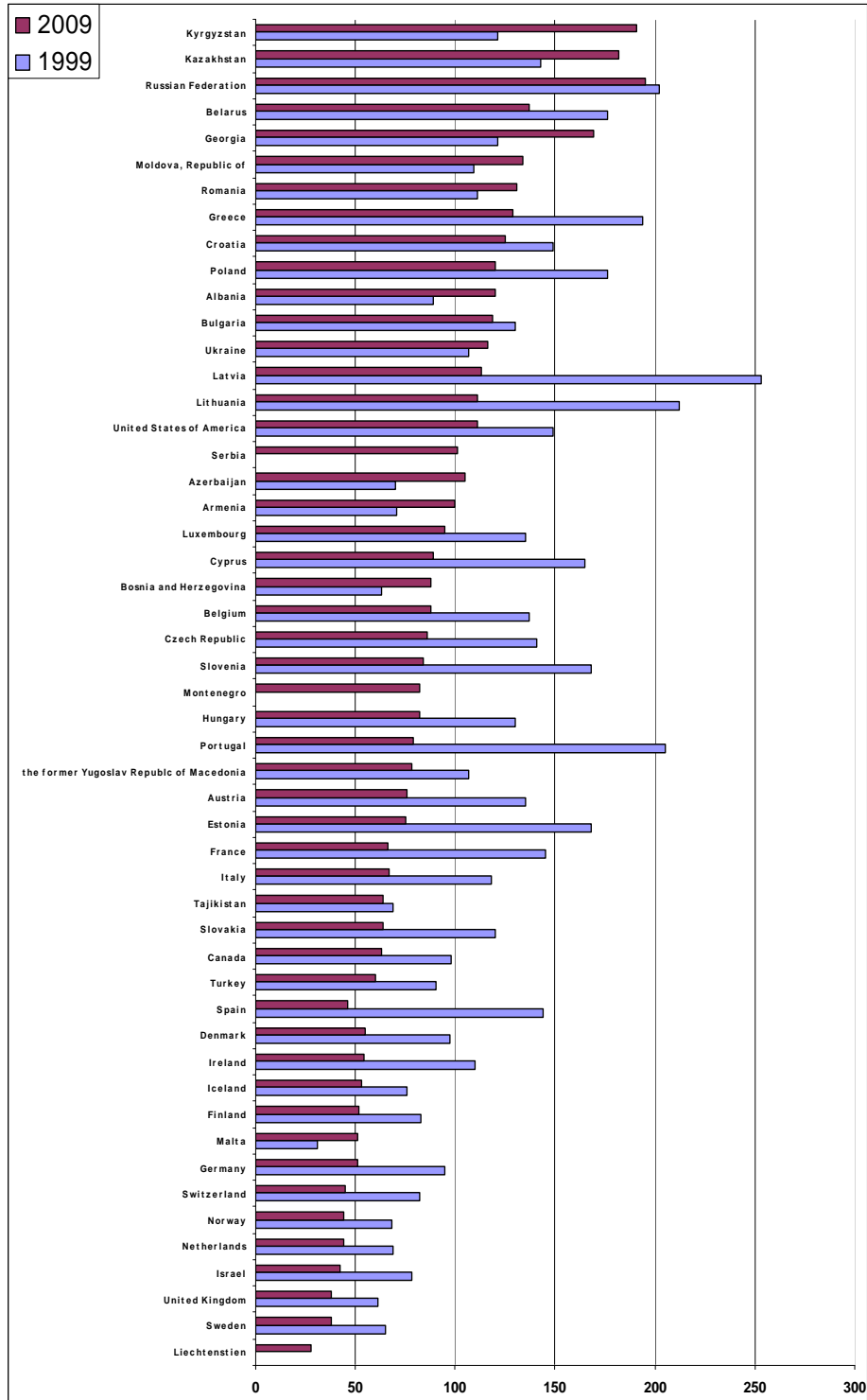
B. Transport, carbon dioxide emissions and the climate change challenge

29. According to the Fourth Assessment Report of the Intergovernmental Panel on Climate Change, transport is responsible for 23% of world energy-related greenhouse gases (GHG) emissions with about three quarters coming from road vehicles. Furthermore, the transport sector is the second largest (and second fastest growing) source of global GHG emissions. More than 1.3 billion road vehicles in the world today produce nearly three billion tonnes of carbon dioxide (CO₂) per year, thus having a very negative impact on the climate.

30. As estimated by the European Environment Agency (EEA), total EU 27 GHG emissions in 2009 were by 6.9% lower than 2008 levels, and by 17.3% below the 1990 base year level. The Energy Information Administration (EIA) of the United States of America estimated that in 2010 transport related CO₂ emissions in the United States have risen by 3.8% over 2009. While projections indicate a decline of 0.6% in emissions for 2011, a further 2.4% increase is expected for 2012.

31. In many UNECE countries, reducing CO₂ emissions from transport through tax and economic incentives is gaining priority in public policy. France has implemented a system whereby buyers of private vehicles are rewarded for opting for less polluting models. Denmark, Iceland and the Russian Federation, among others, taxed energy efficient vehicles more favourably. In the United Kingdom eco-driving training is becoming increasingly available in driving schools and in Austria eco-driving training is organized for public utilities, like the Austrian Post Office. In Iceland, in addition, eco-driving training is mandatory for professional drivers.

Chart 2
Road Fatalities per million inhabitants, 1999–2009



Source: UNECE transport database, CARE

32. The year 2010 noted an unprecedented record high number of extreme weather events and ranked as the warmest year on record, together with 2005 and 1998, according to the World Meteorological Organization. Notably, in the ECE region there was widespread flooding in parts of Central Europe, a heat wave and drought in the Russian Federation and heavy snowstorms across the European continent and in North America. Heavy rain in Central Europe strained bus and tram infrastructure, caused traffic accidents and cargo damages and affected transport interoperability. In December 2010, rail transport in France, Germany and the United Kingdom experienced extended delays and cancellations. Snowy conditions also led to chaotic traffic across the European continent, with traffic jams totalling in the hundreds of kilometres in Belgium and the Netherlands among others. Powerful snowstorms and blizzard conditions in the United States paralyzed transport networks in several parts of the country in February 2010. The closure of the European air space because of the volcanic ash clouds as a result of the 2010 eruptions of Eyjafjallajökull in Iceland created unexpected demand for land transport through out in Western Europe.

33. Timely adaptation measures could prepare the transport sector to handle such demands and infrastructure resilience can offer some protection against the adverse effects of climate change. Rising temperatures, rising sea levels and extreme weather conditions are but some of the potential implications of climate change, that would in turn affect, *inter alia*, transport infrastructure and services and disrupt global supply chains. However, such measures would, consequently, increase already existing pressure on financing and investment in transport infrastructure.

C. Investment in Transport infrastructure and project financing

34. In 2009 and 2010, the economic downturn drove governments to reprioritize the allocation of funds. As a result, many transport projects either came to a standstill, or were cancelled. In many UNECE countries, the share of GDP afforded to transport projects was reduced considerably. In some countries such as Germany, the effect of stimulus packages maintained ongoing transport projects in 2010; nevertheless, the gradual phase out of those packages after 2010 necessitates the design of alternate measures to strengthen funding cycles through “user pays” based policies. Within the EU, grants and concessional loans facilitate the take off of high cost infrastructure projects. Furthermore, Public-Private Partnerships are increasingly gaining preference, with a number of projects underway in the Russian Federation and Turkey among others.

35. In 2010, the US administration awarded 10 billion United States dollars in federal grants for California to begin to work on an 800 mile long high speed rail line tying Sacramento and the San Francisco Bay area to Los Angeles and San Diego. Another 1.25 billion United States dollars was given to the State of Florida to build a rail line connecting Tampa on the West Coast with Orlando in the middle of the State. In Massachusetts, a 55.5 million United States dollars federal stimulus project in late 2010 was aimed at expanding public transit through the extension of commuter rail lines. Most recently, President Obama called for a six year 53 billion United States dollars spending plan for high speed rail, as infrastructure spending will create employment, boost the economy and increase American competitiveness in transportation services. This plan includes, also, rebuilding 150,000 miles of roads and rehabilitating 150 miles of runways.

36. The Russian Federation plans substantial investments to modernize and increase the capacity of existing rail lines, the construction of new ones, activities aimed at rail safety and the electrification of existing tracks. According to information provided by the Russian Federation, fixed capital investments for the transport sector in 2010 are estimated to be over 2% of GDP.

37. The UNECE Trans-European Motorways (TEM) and Trans-European Railways (TER) Projects are regional efforts that facilitate the coordinated development of transport networks by providing a cooperation platform for almost 20 Central, Eastern and South-Eastern European countries. Furthermore, the previously mentioned Euro-Asian Transport Links project is also playing an important role by identifying key priority infrastructure projects in the Eurasian region and working towards securing funds for their implementation. It is becoming increasingly evident, however, that in coming years, investment in large scale transport infrastructure projects despite budget cuts and austerity measures would be essential for maintaining a sustainable transport network in the UNECE region as demand for transport services returns to pre-crisis levels and continues to develop.

D. The automotive industry

38. The automotive industry was hit the most severely by the economic crisis. It saw an unprecedented decline in both production and sales in the years 2008 and 2009. In spite a positive increase in early 2010, new passenger car production and demand in the UNECE area remains below pre-crisis levels. During the first ten months of 2010, the market of commercial vehicles in the EU and EFTA is expanded by almost 7%, due mainly to elevated demand for vans. Production of Heavy Duty Vehicles (HDVs) registered a negative growth for the same period at -5% while buses and coaches also went down by 6% over the previous year.

39. Motor vehicle production in North America fell by 32% in 2009 followed by a 21% decline in sales. However, prominent demand in Asia and South America has triggered optimism for recovery in 2010 and 2011. This is also reflected in the employment increase of about 30% in the US automotive sector compared to 2009. China and Japan account for more than half of all the motor vehicles in use in Asia and the Pacific. Motor sales in China alone expanded by 45% in 2009, equivalent to 13.6 million vehicles sold.

40. In addition to the economic downturn and market challenges the future of the automotive industry is determined by such mega-trends as fast urbanisation and the consequent changes in consumer behaviour (e.g. the new generation is more interested in access to mobility than in cars). In addition, the political and regulatory drivers for change call for Environmentally Friendly Vehicles, for far reaching technological changes. A particular challenge is to reduce CO₂ emissions. These are largely geared to the development of innovative, eco-friendly technologies, as well as on availability of alternative energy sources. Energy efficiency has become a principal objective of both automobile manufacturers and policy makers at the national and international levels. Against this background, and assuming that the generation of electricity and the production of hydrogen will be sustainable the World Forum for Harmonisation of Vehicle Regulations agreed as early as 2008 that to reduce the CO₂ emissions of road vehicles a possible scenario could be:

- in the next five or six years (by 2015) through increased fuel efficiency of 30% of new vehicle with conventional combustion engine;
- by 2020/25 through the introduction of plug-in hybrid electric vehicles as well as hydrogen and fuel-cell vehicles
- by 2040 through wide-scale introduction into the global market of electric vehicles.

41. The automobile industry operates 297 vehicle assembly and engine production plants in the EU 27, the Russian Federation, Ukraine and Turkey, and accounts for one in ten jobs in Europe that directly or indirectly involve the automotive industry. In Europe only, around six million people's jobs depend directly on the future of the industry.

IV. Summary

42. The year 2010 has shown signs of recovery from the global economic and financial crisis. Economic growth is gradually returning with some regions doing better than others. Despite positive trends, several countries in the UNECE area are faced with fiscal challenges and high unemployment rates. Developing Asia has taken the lead towards a healthy global economy, with better than expected economic performances in 2010 and a robust recovery in trade and merchandise exports.

43. The transport sector was heavily affected by the global economic downturn and the 2009 contraction of world merchandise trade. Accordingly, demand for transport services together with related revenues dropped significantly in the ECE region. The year 2010 has shown an encouraging overall increase in freight and passenger inland transport compared to the previous year. Nevertheless levels remain significantly lower than the pre-crisis peak for all inland transport modes (road, rail and inland waterways).

44. Road Safety was the most topical issue in 2010. Road fatalities have noted a significant overall decrease in the ECE region, with exceptions in some subregions, notably the countries of the Commonwealth of Independent States and South-Eastern Europe. The 2011 launching of the Decade of Action for Road Safety will bring this contemporary challenge to the forefront of developments, with most UNECE countries taking concrete steps towards effective road safety policies and the international community coordinating its efforts in this area more coherently.

45. The automotive industry in Europe and the United States recorded an unprecedented decline in production and sales in 2009. However, this sector has proven to be resilient as in 2010, demand for commercial vehicles has improved and the new East Asian market for passenger cars offers potential for growth. Fuel efficient vehicles have become a priority for manufacturers, with a view to contributing to the reduction of road transport related CO₂ emissions. The automotive industry continues to be challenged by the economic trends as much as by the policy makers' call for technological changes towards low-carbon vehicles.

46. However, much more than just technological innovation is needed to effectively reduce CO₂ emissions in inland modes of transport: integrated transport policies are therefore under development in many countries. In addition to mitigation, adaptation of the transport sector is warranted to handle climate change impacts. The quantity and intensity of extreme weather conditions observed in 2010 hindered transport operations considerably, underscoring the need for more efforts on adaptation and risk management measures in the field of inland transport.

47. Despite positive developments in the United States and other UNECE countries in transport infrastructure, the scarcity of funds for the financing of transport projects continues to be a major impediment for national and subnational governments. In the context of regional cooperation efforts and projects, such as the TEM and TER as well as EATL, the coordinated development of priority transports infrastructure is being addressed. Moreover, increased EU co-funding of transport projects in its member States and the increasing preference of governments for Public-Private Partnerships offer some solutions.