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### Inland Transport Committee

#### Working Party on Transport Trends and Economics

Twenty-fifth session

Geneva, 3–5 September 2012

### Report of the Working Party on Transport Trends and Economics on its twenty-fifth session

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## **I. Attendance**

1. The Working Party on Transport Trends and Economics held its twenty-fifth session from 3 to 5 September 2012. The meeting was chaired by Mr. Seref Tabak (Turkey). Representatives of the following United Nations Economic Commission for Europe (UNECE) member States participated: Austria, Belarus, Belgium, Bulgaria, Cyprus, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Norway, Russian Federation, Serbia, Sweden, Switzerland, the former Yugoslav Republic of Macedonia, Turkey and Ukraine.
2. The following intergovernmental organizations were represented: Centre for Transportation Studies for the Western Mediterranean (CETMO), Committee of the Organization of Railways Cooperation (OSJD).
3. The following non-governmental organizations were represented: International Road Federation (IRF), International Road Transport Union (IRU), and International Union of Railways (UIC).
4. The following attended the meeting at the invitation of the secretariat: Polis Network.

## **II. Adoption of the agenda (agenda item 1)**

*Documentation:* ECE/TRANS/WP.5/51/Rev.1

5. The Working Party adopted the agenda (ECE/TRANS/WP.5/51/Rev.1).

## **III. United Nations Economic Commission for Europe workshop on “Urban Transport and Mobility” (agenda item 2)**

*Documentation:* ECE/TRANS/WP.5/2012/1, Informal document No. 1

6. The workshop demonstrated the complexity of the substantive issues involved in Urban Transport and Mobility and the need to further analyse the issue in UNECE area. The Working Party appreciated the presentations made by the excellent speakers, considered them very informative and of great importance and requested the secretariat to consider workshop’s discussions when preparing the questionnaire for the next transport trends and economics publication and include the presentations of the workshop as case studies in this publication.
7. The distinguished speakers and participants in the workshop discussed issues related to public transport system restructuring; economic feasibility of a public transport authority; legal framework for urban mobility and urban traffic management; smart urban mobility with the use of telematics. They all agreed that given the magnitude of the challenge, it is imperative that urban transport and mobility be considered as a matter of priority, along with other transport-related initiatives aimed at mitigating global warming, improving road safety and the quality of life in cities. Several experts from various countries — Greece, Italy, Norway and Switzerland — shared their experiences concerning the management and the operations of a public transport authority. The participants were of the opinion that such examples of effective public transport authority management and operations could assist in developing guidelines and/or best practices for the sector.
8. The participants:

- (a) Agreed on the need for an up to date report on urban transport and mobility statistics from a wide range of countries, i.e. ECE countries;
- (b) Agreed on the need to harmonize data on urban transport and mobility;
- (c) Agreed on the need to collect and disseminate appropriate policy actions and to exchange information about best practices in urban transport and mobility;
- (d) Observed the varying cultural practices of public transport usage and recommended that public transport be actively promoted in a positive light to dispel any negative connotations that it might be associated with;
- (e) Noted that an integrated law for urban transport should connect sustainable land use with efficient urban traffic management, unlimited access to demand management tools at the municipal level and improvement of the urban public transit systems;
- (f) Noted that reliability and trust for services provided, time schedules and connectivity are the most important factors for a user;
- (g) Observed that the existence of a regulator, in a monopolistic environment, is crucial to providing more competitive services;
- (h) Agreed that users are looking for services. All means of public transport should provide services to their users: air conditioning, cleanliness, ticketing machines, stations that protect and provide travelling info by electronic means;
- (i) Observed that many public transit systems, or parts of them, are either over or under used. During peak hours, crowding creates discomfort for users as the system copes with a temporary surge in demand. Low ridership makes many services financially unsustainable, particularly in suburban areas;
- (j) Agreed on the difficulties of parking. Since vehicles spend the majority of the time parked, motorization has expanded the demand for parking space, which has created space consumption problems particularly in central areas; the spatial imprint of parked vehicles is significant. Congestion and parking are also interrelated since looking for a parking space creates additional delays and impairs local circulation;
- (k) Agreed that Information Technology and Intelligent Transport Systems improve public transport as operators can improve their services by having accurate information on the location and progress of vehicles. In addition travellers can get up-to-date information from the appropriate websites, stations and other points of information.

9. Considering urban transport and mobility as a priority which can only be promoted through collective efforts and cooperation at all levels, the participants agreed on the following recommendations:

- (a) The UNECE Transport Division and, in particular, the Working Party on Transport Trends and Economics (WP.5) should further explore the subject and devote its next publication on the analysis of Urban Transport and Mobility in the ECE region;
- (b) Statistics and data harmonization for urban transport and mobility should be envisaged;
- (c) The lessons learned during the workshop should be disseminated to all UNECE member States through WP.5's publication next year;
- (d) Policy formulation should be science-based taking into consideration the specifics of each region.

10. The proceedings of the workshop, including the final conclusions and recommendations, presentations and all workshop material have been uploaded on the UNECE website at [www.unece.org/trans/main/wp5/wp5\\_workshop5.html](http://www.unece.org/trans/main/wp5/wp5_workshop5.html).

#### **IV. Monitoring of the developments relevant to pan-European transport networks (agenda item 3)**

##### **A. The European Commission briefing on the progress made in the development of the Trans-European Transport Network**

*Documentation:* Informal Document No 2.

11. The Working Party expressed its appreciation to the secretariat for preparing, in cooperation with the European Commission the Informal document No. 2 and briefed on the progress made in the development of the Trans-European Transport Network. The Working Party invited the European Commission to continue providing an update on its activities related to pan-European Corridors at its twenty-sixth session in 2013.

##### **B. Trans-European Motorway and Trans-European Railway projects**

*Documentation:* ECE/TRANS/WP.5/2012/2

12. The Working Party appreciated the update provided by the secretariat on the activities implemented by the Trans-European Motorway (TEM) and Trans-European Railway (TER) Projects over the reporting period (2011-2012), including the revision of the Master Plan, and invited the Projects' manager to provide an update on relevant developments in the TEM and TER projects at its twenty-sixth session in 2013;

13. The Working Party noted the following activities done during the period 2011–2012:

- TEM and TER Master Plan Revision and its follow-up activities: new data received; proposals for new priorities; increased interest in intermodal transport, Intelligent Transport Systems and in safety and security;
- A workshop took place on research and development, Intelligent Transport Systems, road/rail intermodal innovations and road safety (Ankara, 27–31 March 2012);
- The TEMSTAT Data Collection and Mapping System meeting took place in Warsaw on 17 and 18 April 2012;
- The TEM/HEEP Area V Annual Meeting took place in Opatija, Croatia on 4 and 5 June 2012.

#### **V. Climate Change impacts and adaptation for international transport networks (agenda item 4)**

*Documentation:* ECE/TRANS/WP.5/GE.3/6

14. The Working Party appreciated the work done by the Group of Experts on Climate Change impacts and adaptation for international transport networks and took note of the latest activities of the group including the organization of an international conference on climate change adaptation for international transport networks held in Alexandroupolis, Greece.

15. The Working Party took note of the following conclusions and recommendations agreed and decided during the international conference on climate change adaptation for international transport networks:

(a) The lessons learned during the conference should be disseminated to the Governments of the countries participating in the Conference;

(b) Adaptation practices in the transport sector should also be disseminated through the United Nations Framework Convention on Climate Change (UNFCCC) Nairobi work programme (NWP) by submitting an Action Pledge. The NWP provides a platform to organizations for knowledge sharing and networking.

(c) Governments should be aware of climate change and its impacts on transport networks; awareness should be raised on transport infrastructure adaptation to climate change and more effort should be put towards this direction.

(d) There should be both collaborative research and policy actions to develop effective adaptation strategies for climate change impacts on international transport. Well targeted vulnerability studies, empirical studies and assessment of projected risks and related costs should be a first step towards bridging the current knowledge gaps and identifying priority areas.

(e) There should be science-based policy formulation, which takes into consideration the specifics of each region.

(f) Investments specifically targeted for the adaptation of transport networks to climate change should become available, as adaptation of infrastructure is linked with higher than normal construction costs and, in addition, some States are not in a position to financially undertake such plans.

(g) In view of the above, further research and promotion of specific measures for affordable adaptation of transport infrastructure and transportation mobile to climate change should be conducted.

(h) The results of the Conference should be promoted in order to assist in developing guidelines for countries in all the United Nations regional commissions' geographical areas.

16. The secretariat informed the Working Party that a questionnaire was prepared and distributed to all UNECE member and non-member States and requested the countries that had not yet replied to this questionnaire to do so.

## **VI. Euro-Asian Transport Links (agenda item 5)**

### **A. Progress on Euro-Asian Transport Links (EATL) work**

*Documentation:* ECE/TRANS/WP.5/2012/3

17. The Working Party appreciated the work done by the secretariat and took note of the progress of the work of the group of experts on EATL and the recent developments of the EATL phase II (ECE/TRANS/WP.5/2012/3). The Working Party took note that the EATL phase II study with the final conclusions will be published early next year.

18. The Working Party took note and adopted the main conclusions of the phase II study that include the following:

(a) The intercountry cooperation in the EATL Project promoted by UNECE encourages cooperation among 27 countries along the Euro-Asian land bridge for the coordinated development of Euro-Asian inland transport links.

(b) The project has so far produced country-demanded, tangible results and proposals for the development and operation of safe, secure and efficient Euro-Asian transport solutions addressing both physical and non-physical obstacles to transport.

(c) Results include an investment strategy for developing 311 priority transport infrastructure projects along the main Euro-Asian routes with a total cost of 215 billion United States dollars, together with an analysis of non-physical obstacles to transport, an elaboration of focused studies, the development of a GIS database and related applications, as well as policy recommendations.

(d) The group is implementing a focused work plan, including studies and analyses, promoting transport infrastructure and facilitation initiatives and actions, organizing meetings and capacity-building events.

19. Notwithstanding the value of the results achieved, there are also many challenges ahead. The work done so far has made it clear that the real development potential of EATL inland transport connections lies in the following dimensions:

(a) the capacity to become a part of the main supply chains including a combination of various transport modes that complement each other;

(b) in focusing on facilitation, efficiency, reliability and cost/time-reducing transportation measures;

(c) in facilitating reforms that need to be undertaken in the EATL transition economies; and

(d) in assisting landlocked EATL developing countries to enter in the EATL routes, since a weak part or a missing link in one country can render a whole EATL route economically unviable for international transport.

## **B. Developments in EATL Project Phase III**

20. The Working Party also considered and endorsed the recommendations of the progress report prepared by the secretariat on a possible phase III. These recommendations include, among others:

(a) Updating and/or completing data related to EATL Phase II proposed projects;

(b) Updating data concerning EATL projects funding securitization;

(c) Involving new countries in the study;

(d) Identifying new extensions on proposed EATL routes, as well as new infrastructure projects;

(e) Identifying service provision along proposed EATL routes and intermodal transit nodes;

(f) Building an EATL observatory;

(g) Creating synergies with/and integrate results of related programmes;

(h) Reviewing border crossing issues and obstacles and transport facilitation, and related technical and institutional actions.

21. The Working Party suggested that the next steps of the project — possible phase III — should focus on more market oriented analysis and results that would further facilitate transport along the Euro-Asian corridors.

### **C. Other Euro-Asian transport initiatives**

22. The secretariat informed the Working Party about the Ministerial conference on the Euro-Asian Transport Linkages project and on the Unified Railway Law that will take place on 26 February 2013 during the next session of the Inland Transport Committee.

23. The Working Party took note of the declaration prepared by the secretariat as recommended for signing a declaration at the Ministerial meeting. The Working Party requested the secretariat to distribute through official channels as soon as possible this declaration so that the Governments had time to review it and provide comments and amendments to the secretariat.

24. The Working Party was also informed by the secretariat on the possibility for organizing during the Ministerial meeting a photography contest and exhibition with photographs provided by the countries participating at the EATL project. The Working Party welcomed this initiative and requested the secretariat to provide more details and information for the organization of such an exhibition.

## **VII. Transport in the Mediterranean Region (agenda item 6)**

### **A. Report of the Mediterranean Transport Study Centre**

*Documentation:* Informal document No. 3

25. The representative of CETMO introduced the report on recent activities of CETMO for consideration by the Working Party (Informal document No. 3).

26. The representative of CETMO noted that close cooperation should be encouraged between the Trans-European Transport Network, the EATL project and the Trans-Mediterranean and 5+5 Transport network in their GIS initiatives and activities. Such cooperation could create economies of scale and could further strengthen project work.

27. The Working Party welcomed the proposal made by the representative of CETMO and asked the representatives of the three projects, if it is possible, to report at the next Working Party session specifically on the implementation of GIS systems.

28. The Working Party expressed its appreciation to the CETMO secretariat for its comprehensive report and requested an update on CETMO activities for its next session in 2013.

### **B. The Euro-Mediterranean transport network**

29. Nothing was reported.

## VIII. Review of the transport situation, emerging trends and challenges in ECE region (agenda item 7)

### A. Review of the transport situation, transport trends and economics in ECE region

*Documentation:* ECE/TRANS/WP.5/2012/4 and UNECE publication

30. The Working Party took note of the review of the transport situation in UNECE member countries and of emerging development trends (ECE/TRANS/WP.5/2012/4 and UNECE publication) prepared by the secretariat. The Working Party noted that the report was prepared by the secretariat based on the inputs received from 37 member countries to a questionnaire sent by the secretariat. The Working Party considered the most important trends in inland transport as follows:

(a) In their replies to the questionnaire, UNECE member Governments focused on the national transport policies of 14 different themes subject to specific needs in their countries. The following four themes were included in the majority:

- (i) the reforms and improvement of railways (efficiency, infrastructure and competitiveness);
- (ii) the development of transport infrastructure;
- (iii) the improvement of road safety;
- (iv) the implementation of intelligent transport systems.

(b) The countries replied that the following were obstacles for the development of inland transport in 2011:

- (i) For transport infrastructure: long and bureaucratic administration processes for completing public tenders, financing problems or financing alternatives, etc.
- (ii) For railway efficiency: railway company reform and separation of infrastructure from operations, railway profitability and investments in infrastructure, maintenance of existing infrastructures.

(c) Road transport both in terms of car use and commercial operations grew. In almost all responding countries, a drop in 2009 in road transport was followed by growth in 2010, sometimes by more than 5 per cent. The forecasts for 2011, in general, show that there is an increase but less so than in 2010. Concerning road freight transport, the issue of TIR Carnets can be a reliable barometer: in 2011 the TIR Carnets issued exceeded three million, increasing by 38 per cent compared to 2009 and by more than 9 per cent compared to 2010.

(d) Twenty per cent of the countries of ECE region (11 countries) perform more than the 80 per cent of the carriage of goods by rail. These eleven countries perform more than 4,968,739 million tonne km of a total of 5,187,495.

(e) Countries reported that the use of inland water transport is low and worsening. Another major issue is the subject of missing links in inland water transport infrastructure. The economic crisis and the lack of funds were reported as main obstacles for inland waterways infrastructure improvement. In addition to the lack of proper infrastructure, the old fleets are reported as a barrier towards efficiency. Another important topic is that inland waterways are at risk of losing their environmental performance. The old fleets and the lack of use of alternative fuels have become a significant disadvantage.

(f) Thirty-seven per cent (12 countries) of the countries who replied to the UNECE Transport Division questionnaire replied positively on the development of a logistics master plan and 63 per cent (20 countries) negatively.

(g) Thirty-four per cent (11 countries) of the countries who replied to the UNECE Transport Division questionnaire replied positively on the development of a national master plan for Intermodal transport and 66 per cent (21 countries) negatively.

## **B. Transport Trends and Economics 2012: Urban transport and mobility**

*Documentation: ECE/TRANS/WP.5/2012/5*

31. The working party was informed on the theme of next year's transport trends and economics publication. The secretariat suggested that the publication should focus on "urban transport and mobility". The secretariat mentioned that many initiatives exist on urban transport and mobility but few focus on data collection and statistics analysis. The data collected from the various organizations is either generic and in parallel specialised (number of vehicles per habitants or loans given for urban development, World Bank), or dedicated to urban development for specific cities (UITP) and do not cover the ECE region.

32. The transport trends and economics 2013: urban transport and mobility will include data received from the capitals of the 56 UNECE member States and will focus, inter alia, on:

- (a) Urban transportation networks analysis (km of bus lanes, bicycle lanes, etc.);
- (b) Urban transport capacity (number of buses, trams, etc.);
- (c) Time schedule analysis in correlation with capacity management;
- (d) Ticketing;
- (e) Population and km of pedestrian roads.

33. The main objective of this publication would be:

- (a) The mapping of the urban networks of UNECE capitals and the illustration of urban transport and mobility indicators;
- (b) To shed more light on one of the biggest challenges in developing sustainable urban transport systems — that of creating economically, efficient, socially affordable and accessible, as well as environmentally-friendly urban transport systems;
- (c) To underline the magnitude of negative social, economic and environmental effects of transport in urban areas where the majority of UNECE population is currently living;
- (d) To provide policymakers with best practices and successful examples from the region allowing them to make informed decisions on policy;
- (e) To bring together of policymaker's visions from different levels of Governments (national, regional, local) as well as transport planners and academia, and provide a platform for thinking about future policy choices.

34. The Working Party took note of this information and next year's theme and adopted the theme and questionnaire. The Working Party decided to distribute the questionnaire to public transport authorities of the Capitals of ECE member states. Also the Working Party requested the secretariat to amend the questionnaire as to include detailed descriptions for urban transport ticket rates. The Working Party asked member countries to respond to the secretariat's questionnaire on urban transport and mobility.

### **C. Transport Trends and Challenges in a UNECE member State**

*Documentation:* Informal document No. 4

35. The representative of Ukraine Mr. Yuriy Panasiuk made a presentation on the recent transport developments, trends and challenges in his country.

36. The Working Party thanked the representative of Ukraine for his report and presentation, which highlighted the recent transport developments, trends and challenges in this country.

37. The Chair of the Working Party asked which country would be ready to present a report at the next session of WP.5 on the measures taken with a view to improving the transport services on the national networks. Lithuania replied positively to Chair's request.

### **D. Transport trends and challenges in the road sector**

*Documentation:* Informal document No. 5

38. The representative of IRU Mr. Jens Hgel made a presentation on transport trends and challenges in the road sector.

39. The Working Party noted that according to the IRU road transport indices ([www.iru.org/en\\_services\\_indices\\_index](http://www.iru.org/en_services_indices_index)) which allow the comparison of GDP growth, road freight transport volumes and new vehicle registrations in 58 countries, the BRIC (Brazil, Russian Federation, India, China) countries will continue to drive economic growth, whereas the economic growth rates remain very low in the Organisation for Economic Co-operation and Development (OECD) countries, including in the European Union (EU). GDP increased by 14.6 per cent in the BRIC countries from 2008 to 2010, and decreased by 0.9 per cent in the OECD and by 2.7 per cent in the EU. During the same period, new vehicle registrations increased by 13.8 per cent in the BRIC countries, whereas the OECD and the EU experienced a decrease of 36 per cent and 40 per cent respectively. In 2011, IRU road transport indices for the BRIC countries showed a continuous growth in new vehicle registrations by 7.8 per cent, whereas that of OECD countries, including the EU, recorded a growth of 1.6 per cent and 2.1 per cent respectively.

40. The Working Party expressed its appreciation to IRU for the presentation on the analysis of recent road transport trends and challenges and invited IRU to provide an update on relevant developments in the road sector at its twenty-sixth session in 2013.

### **E. Transport trends and challenges in the rail sector**

*Documentation:* Informal document No. 6

41. The representative of UIC Mr. Vincent Vu made a presentation on transport trends and challenges in the rail sector.

42. The Working Party noted that, according to the UIC synopsis, the recovery of passengers is slowing down as of 2010 and a continuing freight recovery as of 2010. Passenger activity has never drawn back to 2008 levels but slowed down from more than 7 per cent in 2008 to hardly 3 per cent today. Europe's rail freight traffic is increasing its market share, especially in Ukraine which has an increase of more than 10 per cent. The Russian Federation has the lead with one quarter of the world's freight traffic, with an 8 per cent increase in 2010 and a 5.7 per cent increase again in 2011.

43. The Working Party expressed its appreciation to UIC for the presentation on the analysis of recent rail transport trends and challenges and invited UIC to provide an update on relevant developments in the rail sector at its twenty-sixth session in 2013.

## **IX. Transport and Competitiveness (agenda item 8)**

*Documentation:* Informal document No. 7

44. The Working Party took note of the report prepared by the secretariat on the UNECE project “Supply Chain Challenges for National Competitiveness through Transport”. The secretariat informed the Working Party that a consultant was engaged to develop the methodology for this project. The first draft of the methodology has been submitted and inputs have been provided for improvements. The main objective in mid-October is the draft transport performance indicators’ model that will be distributed to the task force members for their inputs. The secretariat informed the Working Party that pilot trials of the methodology are organized and the countries were asked to participate at these trials.

45. The Working Party expressed its appreciation for the work carried out.

## **X. Technical assistance to countries with transition economies (agenda item 9)**

*Documentation:* Informal document No. 8

46. The Working Party appreciated the activities of the Regional Advisor and took note of the document “Decade of Technical Assistance in the field of Transport, 2002–2012” prepared by the secretariat.

## **XI. Activities of United Nations Economic Commission for Europe bodies of interest to the Working Party (agenda item 10)**

*Documentation:* ECE/TRANS/223

47. The Working Party took note of the decisions of the seventy-fourth session of the Inland Transport Committee (28 February to 1 March 2012) related to its areas of work and asked the secretariat to be informed about such decisions at its twenty-sixth session in 2013.

## **XII. Election of officers for the Working Party’s sessions in 2013 and 2014 (agenda item 11)**

48. The Working Party elected Mr. Björn Oriwohl (Germany) and Mr. Alexey Alexeev (Russian Federation) respectively as Chair and Vice-Chair for its sessions in 2013 and 2014.

## **XIII. Other business (agenda item 12)**

49. There were no proposals under this item.

**XIV. Date of next session (agenda item 13)**

50. The Working Party's twenty-sixth session is tentatively scheduled to take place in Geneva from 10 to 12 September 2013.

**XV. Adoption of the decisions (agenda item 14)**

51. The Working Party adopted the list of main decisions of its twenty-fifth session and requested the secretariat and the Chair to prepare the full and complete report for circulation to the members of the Working Party for comments on items other than those contained in the list of main decisions.

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