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ENGLISH, FRENCH AND
RUSSIAN

ECONOMIC COMMISSION FOR EUROPE

INLAND TRANSPORT COMMITTEE

(Seventy-second session, 23-25 February 2010,
Agenda item 7(c))

REVIEW OF THE TRANSPORT SITUATION IN UNECE MEMBER COUNTRIES AND OF EMERGING DEVELOPMENT TRENDS

Country Reports - 2009

Note by the secretariat

1.2.5 Transport

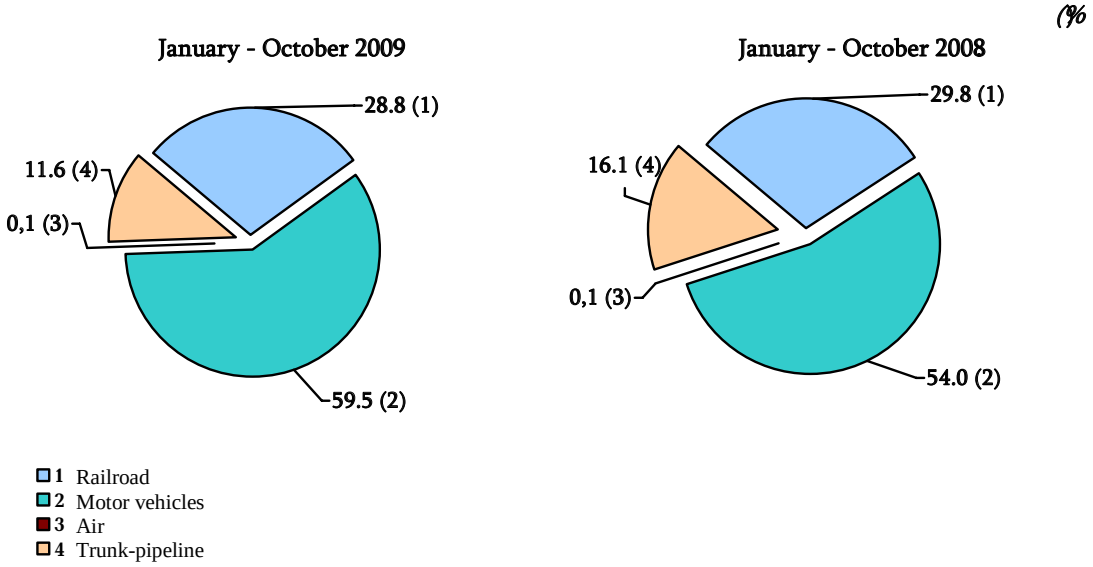
Cargo Transportation. General Purpose Transport Cargo Transportation Volume for January-October, 2009, in Armenia has increased with 2.8% in comparison with January-October of 2008.

Cargo Transportation Volume by types of General Purpose Transport

	January-October, 2009	January-October, 2009, compared with January-October, 2008, %	October, 2009	October, 2009, compared with September, %
Transport – *total, 1000 t*	**7908.3**	**102.8**	**1151.7**	**102.3**
of which:				
Railroad	**2278.2**	**99.3**	**347.2**	**127.1**
of which:				
exported	290.2	51.9	29.3	135.0
imported	1077.2	97.7	180.4	134.8
intrarepublican	910.8	144.0	137.5	116.8
Motor vehicles	**4704.8**	**113.3**	**726.5**	**95.0**
of which:				
exported	134.8	79.2	15.1	112.7
imported	526.9	79.7	69.6	113.2
intrarepublican	4043.1	121.7	641.8	93.1
Air	**7.0**	**77.8**	**0.6**	**75.0**
of which:				
exported	2.7	75.0	0.1	33.3
imported	4.3	79.6	0.5	100.0
Trunk-pipeline	**918.3**	**74.1**	**77.4**	**88.4**
of which:				
imported	918.3	74.1	77.4	88.4

Cargo transportation volume by types of General Purpose Transport

(%)



Share of Exported, Imported and Intrarepublican Cargo Transportation by General Purpose Transport types

(%)

	January-October, 2009	January-October, 2008
Railroad	**100.0**	**100.0**
of which:		
exported	12.7	24.4
imported	47.3	48.0
intrarepublican	40.0	27.6
Motor vehicles	**100.0**	**100.0**
of which:		
exported	2.9	4.1
imported	11.2	15.9
intrarepublican	85.9	80.0
Air	**100.0**	**100.0**
of which:		
exported	38.6	40.0
imported	61.4	60.0
Trunk-pipeline	**100.0**	**100.0**
of which:		
imported	100.0	100.0

Transportations of General Purpose Railway Transport by Main Types of Freights

	January-October, 2009	January-October, 2009, compared with January-October, 2008, %
Cargo Transportation Volume	**2278.2**	**99.3**
of which:		
mineral building materials	192.0	36.4
cement	128.2	34.7
coal	4.4	93.6
petroleum and petroleum product	285.5	98.0
non-ferrous metal ore	487.4	8.6 times
ferrous metals	30.0	6.7 times
ferrous metal iron	37.5	172.0
chemical and mineral fertilizers	16.3	54.7
forest freights	27.4	59.1
grain and re-grinding	401.1	126.7

Usage Indicators for General Purpose Railway Transport Freight Wagons

	January-October, 2009	January-October, 2008	*Deviation, (+, -)*
Daily average loading of wagons, *unit*	**69**	**71**	**-2**
Daily average unloading of wagons, *unit*	**118**	**107**	**+11**
Wagon turnover, *day*	**6.1**	**6.8**	**+0.7**

Cargo Turnover. General Purpose Transport Cargo Turnover Volume for January-October, 2009, in Armenia has decreased with 17.1% in comparison with January-October of 2008.

Cargo Turnover Volume by types of General Purpose Transport

	January-October, 2009	January-October, 2009, compared with January-October, 2008, %	October, 2009	October, 2009, compared with September, %
Transport – total, mil. t-km	**2002.2**	**82.9**	**208.0**	**99.1**
of which:				
railroad	579.6	100.7	80.0	118.9
motor vehicles	143.5	99.5	19.9	98.0
air	7.5	70.8	0.9	100.0
trunk-pipeline	1271.6	75.4	107.2	88.4

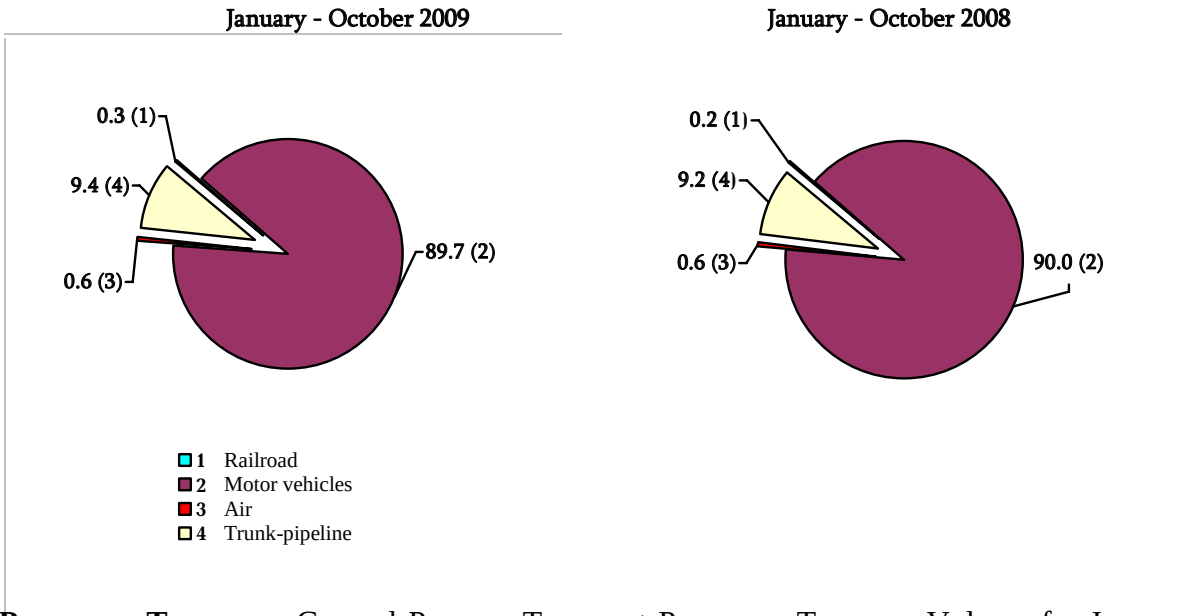
Passenger Transportation. General Purpose Transport Passenger Transportation Volume for January-October, 2009, in Armenia has increased with 1.1% in comparison with January-October of 2008.

Passenger Transportation Volume by types of General Purpose Transport

	January-October, 2009	January-October, 2009, compared with January-October, 2008, %	October, 2009	October, 2009, compared with September, %
Transport – total, 1000 people	**204632.0**	**101.1**	**21956.2**	**99.2**
of which:				
railroad	622.7	148.8	67.0	104.7
motor vehicles	183583.4	100.8	19291.1	97.9
of which:				
taxis	13725.0	113.6	1580.4	105.6
air	1233.4	97.7	129.4	85.9
trunk-pipeline	19192.5	102.8	2468.7	111.7

Passenger Turnover Volume by types of General Purpose Transport

(%)



Passenger Turnover. General Purpose Transport Passenger Turnover Volume for January-October, 2009, in Armenia has decreased with 2.9% in comparison with January-October of 2008.

Passenger Turnover Volume by types of General Purpose Transport

	January-October, 2009	January-October, 2009, compared with January-October, 2008, %	October, 2009	October, 2009, compared with September, %
Transport – total, mil. p.-km	**3142.0**	**97.1**	**310.5**	**84.2**
of which:				
railroad	29.3	145.0	2.5	86.2
motor vehicles	2068.9	93.8	194.4	81.2
of which:				
taxis	128.3	126.0	14.5	102.8
air	969.3	103.5	104.0	88.4
trunk-pipeline	74.5	103.8	9.6	110.3

Traffic Accidents. Number of Traffic Accidents for January-October, 2009, in Armenia has decreased with 9.6% in comparison with January-October of 2008.

Traffic Accidents

	January-October, 2009	January-October, 2009, compared with January-October, 2008, %	October, 2009	October, 2009, compared with September, %
Traffic Accidents– total	**1622**	**90.4**	**213**	**118.3**
Killed, *persons*	261	81.1	29	161.1
Injured, *persons*	2249	88.1	284	124.0

1.2.5. Транспорт

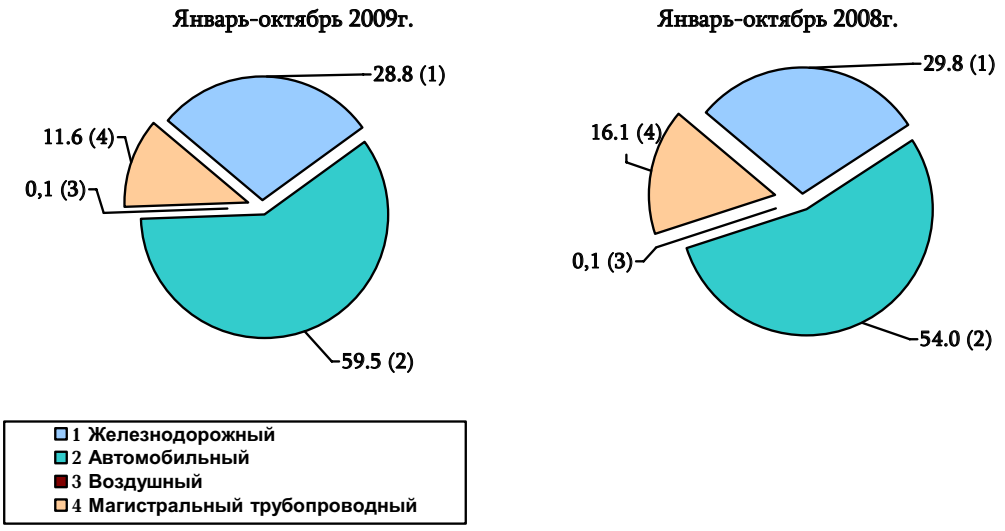
Перевозки грузов. За январь-октябрь 2009г., по сравнению с январем-октябрем 2008г., объем перевозок грузов транспортом общего пользования в республике увеличился на 2.8 %.

Перевозки грузов по видам транспорта общего пользования

	Январь-октябрь 2009г.	Январь-октябрь 2009г. к январю-октябрю 2008г., %	Октябрь 2009г.	Октябрь 2009г. к сентябрю, %
Транспорт-всего, тыс. тонн	**7908.3**	**102.8**	**1151.7**	**102.3**
в том числе:				
железнодорожный	***2278.2***	***99.3***	***347.2***	***127.1***
в том числе:				
вывезено	290.2	51.9	29.3	135.0
ввезено	1077.2	97.7	180.4	134.8
внутриреспубликанские	910.8	144.0	137.5	116.8
автомобильный	***4704.8***	***113.3***	***726.5***	***95.0***
в том числе:				
вывезено	134.8	79.2	15.1	112.7
ввезено	526.9	79.7	69.6	113.2
внутриреспубликанские	4043.1	121.7	641.8	93.1
воздушный [1]	***7.0***	***77.8***	***0.6***	***75.0***
в том числе:				
вывезено	2.7	75.0	0.1	33.3
ввезено	4.3	79.6	0.5	100.0
магистральный трубопроводный	***918.3***	***74.1***	***77.4***	***88.4***
в том числе:				
ввезено	918.3	74.1	77.4	88.4

Структура перевозок грузов по видам транспорта общего пользования

(%)



[1] В данных отражены также грузоперевозки, выполненные самолетами авиакомпаний других стран.

Удельный вес вывезенных, ввезенных и внутриреспубликанских перевозок грузов по видам транспорта общего пользования

(%)

	Январь-октябрь 2009г.	Январь-октябрь 2008г.
Железнодорожный	***100.0***	***100.0***
в том числе:		
вывезено	12.7	24.4
ввезено	47.3	48.0
внутриреспубликанские	40.0	27.6
Автомобильный	***100.0***	***100.0***
в том числе:		
вывезено	2.9	4.1
ввезено	11.2	15.9
внутриреспубликанские	85.9	80.0
Воздушный	***100.0***	***100.0***
в том числе:		
вывезено	38.6	40.0
ввезено	61.4	60.0
Магистральный трубопроводный	***100.0***	***100.0***
в том числе:		
ввезено	100.0	100.0

Перевозки основных видов грузов железнодорожным транспортом общего пользования

	Январь-октябрь 2009г.	Январь-октябрь 2009г. к январю-октябрю 2008г., %
Объем грузоперевозок, тыс. тонн	**2278.2**	**99.3**
из них:		
минеральные строительные материалы	192.0	36.4
цемент	128.2	34.7
каменный уголь	4.4	93.6
нефть и нефтепродукты	285.5	98.0
руда цветных металлов	487.4	8.6 раза
черные металлы	30.0	6.7 раза
лом черных металлов	37.5	172.0
химические и минеральные удобрения	16.3	54.7
лесные грузы	27.4	59.1
зерно и продукты перемола	401.1	126.7

Показатели использования грузовых вагонов железнодорожного транспорта общего пользования

	Январь-октябрь 2009г.	Январь-октябрь 2008г.	Отклонение *(+ , -)*
Среднесуточная погрузка вагонов, *единиц*	***69***	***71***	***-2***
Среднесуточная разгрузка вагонов, *единиц*	***118***	***107***	***+ 11***
Вагонооборот, *дни*	***6.1***	***6.8***	***+0.7[1]***

Грузооборот. За январь-октябрь 2009г., по сравнению с январем-октябрем 2008г., объем грузооборота транспортом общего пользования в республике уменьшился на 17.1 %.

[1] Знак "+"показывает учащение вагонооборота, знак "-" - замедление.

Грузооборот по видам транспорта общего пользования

	Январь-октябрь 2009г.	Январь-октябрь 2009г. к январю-октябрю 2008г., %	Октябрь 2009г.	Октябрь 2009г. к сентябрю, %
Транспорт-всего, млн.тонна-км	**2002.2**	**82.9**	**208.0**	**99.1**
в том числе:				
железнодорожный	579.6	100.7	80.0	118.9
автомобильный	143.5	99.5	19.9	98.0
воздушный	7.5	70.8	0.9	100.0
магистральный трубопроводный	1271.6	75.4	107.2	88.4

Перевозки пассажиров. За январь-октябрь 2009г., по сравнению с январем-октябрем 2008г., объем перевозок пассажиров транспортом общего пользования в республике увеличился на 1.1%.

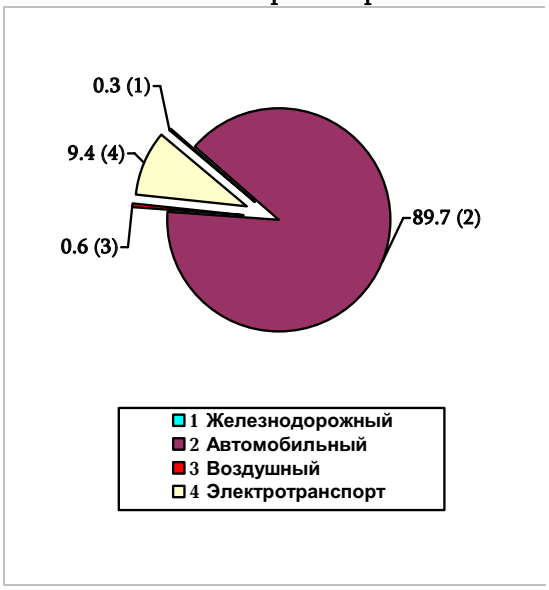
Перевозки пассажиров по видам транспорта общего пользования

	Январь-октябрь 2009г.	Январь-октябрь 2009г. к январю-октябрю 2008г., %	Октябрь 2009г.	Октябрь 2009г. к сентябрю, %
Транспорт-всего, тыс. человек	**204632.0**	**101.1**	**21956.2**	**99.2**
в том числе:				
железнодорожный	622.7	148.8	67.0	104.7
автомобильный	183583.4	100.8	19291.1	97.9
из коих:				
легковым таксомоторным	*13725.0*	*113.6*	*1580.4*	*105.6*
воздушный [1]	1233.4	97.7	129.4	85.9
электротранспорт	19192.5	102.8	2468.7	111.7

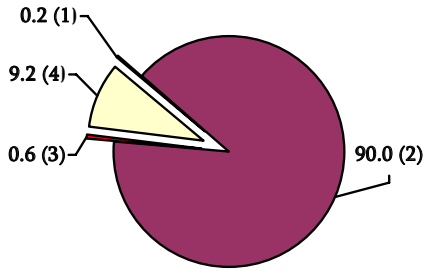
Структура перевозок пассажиров по видам транспорта общего пользования

(%)

Январь-октябрь 2009г.



Январь-октябрь 2008г.



[1] В данных отражены также пассажироперевозки выполненные самолетами других стран.

Пассажирооборот. За январь-октябрь 2009г., по сравнению с январем-октябрем 2008г., объем пассажирооборота транспорта общего пользования в республике уменьшился на 2.9 %.

Пассажирооборот по видам транспорта общего пользования

	Январь-октябрь 2009г.	Январь-октябрь 2009г. к январю-октябрю 2008г., %	Октябрь 2009г.	Октябрь 2009г. к сентябрю, %
Транспорт-всего, млн. пассажиро-км	**3142.0**	**97.1**	**310.5**	**84.2**
в том числе:				
железнодорожный	29.3	145.0	2.5	86.2
автомобильный	2068.9	93.8	194.4	81.2
из коих: таксомоторный	*128.3*	*126.0*	*14.5*	*102.8*
воздушный	969.3	103.5	104.0	88.4
электротранспорт	74.5	103.8	9.6	110.3

Дорожно-транспортные происшествия. За январь-октябрь 2009г., по сравнению с январем-октябрем 2008г., дорожно-транспортные происшествия (ДТП) в республике уменьшились на 9.6 %.

Дорожно-транспортные происшествия

	Январь-октябрь 2009г.	Январь-октябрь 2009г. к январю-октябрю 2008г., %	Октябрь 2009г.	Октябрь 2009г. к сентябрю, %
ДТП, всего	**1622**	**90.4**	**213**	**118.3**
Погибло, человек	261	81.1	29	161.1
Ранено, человек	2249	88.1	284	124.0

TRANSPORT SITUATION IN BELGIUM IN 2009

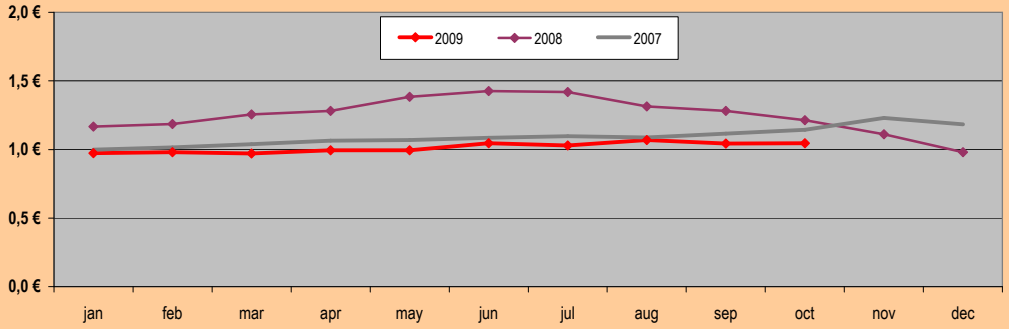
BRANDSTOF en WEGVERKEER — CARBURANT et TRAFIC ROUTIER

COMMENTAAR: — ***: COMMENTAIRES***

FUEL AND ROAD TRAFFIC - The price of fuel remained markedly under the 2008 level, encouraging road haulage over alternatives, Overall the number of new vehicles registered (all categories confounded) remains below the 2008 level, except for november 2009, which seems an indication that the worst of the economic crisis is over, The sales of second hand vehicles (all categories confounded) follow a more erratic pattern, but were generally higher than in 2007 and 2008, equally pointing to low economic expectations during 2009, The evolution of road traffic in 2009 compared to 2008 reflects not only the crisis but also the price of the barrel, giving an most remarkable graph,

DIESELPRIJS — **PRIX du DIESEL**

EURO/liter — **EURO/litre**



Bron: max. maandelijkse prijs BTW incl. vlgs Petroleumfederatie

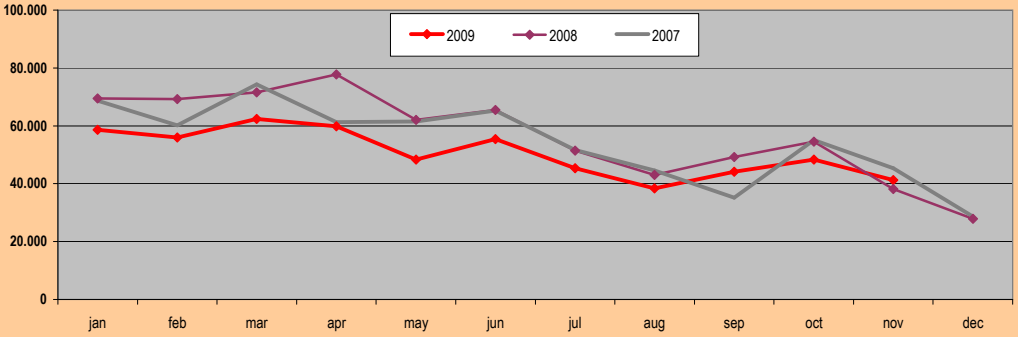
Source: prix mensuel max. TVA incl. svt Fédération pétrolière

NIEUWE VOERTUIGEN ingeschreven bij de DIV (alle categorieën)

aantal/maand

NOUVEAUX VEHICULES immatriculés à la DIV (toutes catégories)

nombre/mois



Bron: FODMV DIV

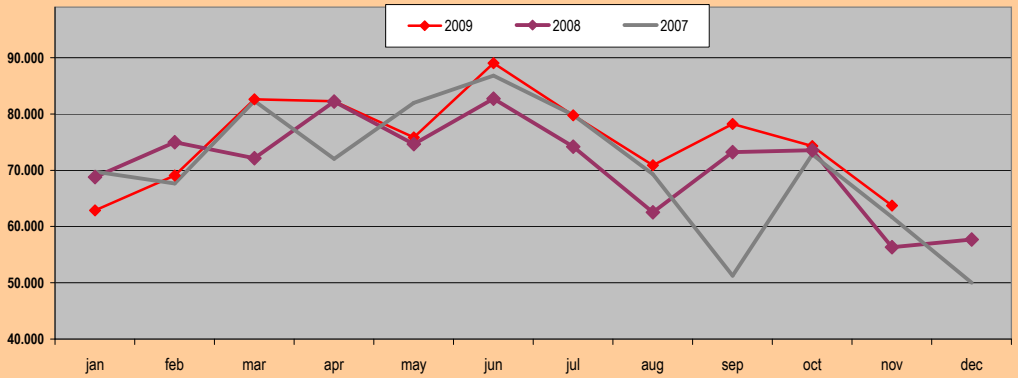
Source: SPFMT DIV

2de HANDS VOERTUIGEN ingeschreven bij de DIV (alle categorieën)

aantal/maand

VEHICULES d'OCCASION immatriculés à la DIV (toutes catégories)

nombre/mois



Bron: FODMV DIV

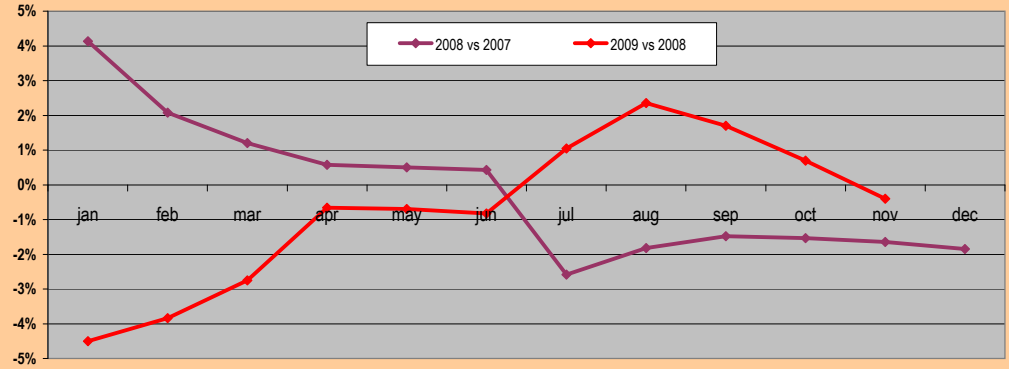
Source: SPFMT DIV

AUTOSNELWEG-VERKEER in voertuig-km

verschil in % t.o.v. het vorige jaar

TRAFIC AUTOROUTIER en véhicules-km

% de variation par rapport à l'année précédente



Bron: FODMV Dir. Mobiliteit Start-Sitter

Source: SPFMT Dir. Mobilité Start-Sitter

PERSONENVERVOER (nat. & internat.) TRANSPORT DE PERSONNES (nat. & internat.)

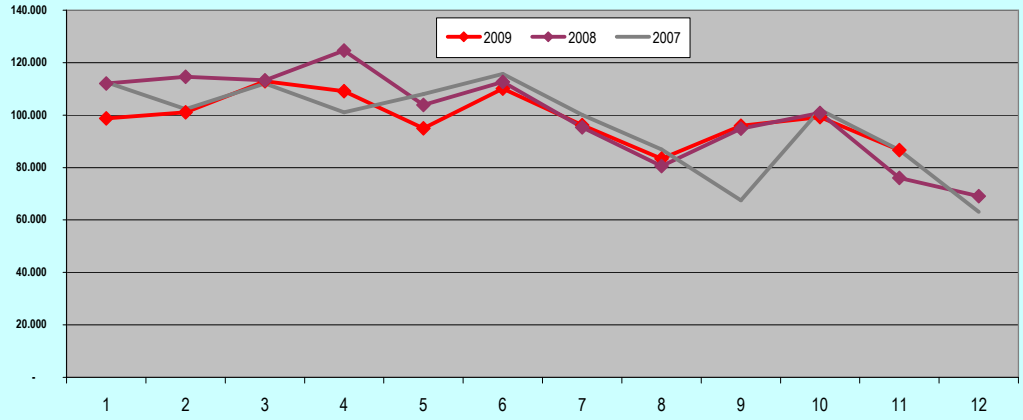
COMMENTAAR:

TRANSPORT AND MOBILITY OF PERSONS - The number of registered cars returned to its 2007 level, even though the average distance travelled shows a 6% drop (all roads confounded), The number of train passengers was stable, but somewhat lower than in 2008; possible due to the lower fuel prices and/or the growth of unemployment,.
There is a marked drop in international passenger traffic, still standing by the end of 2009 at minus 3 to 5% for rail transport and minus 10% for air passengers.

: COMMENTAIRES

NIEUWE PERSONEN-WAGENS ingeschreven bij de DIV (alle categorieën)

aantal/maand



NOUVELLES VOITURES PERSONNELLES immatriculés à la DIV (toutes catégories)

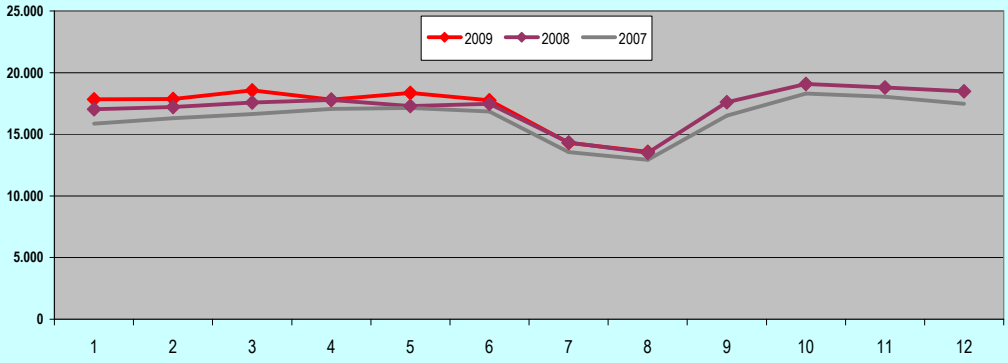
nombre/mois

Bron: FODMV DIV

Source: SPFMT DIV

SPOORWEG-REIZIGERS NATIONAAL

aantal/maand



VOYAGEURS en TRANSPORT FERROVIAIRE NATIONAL

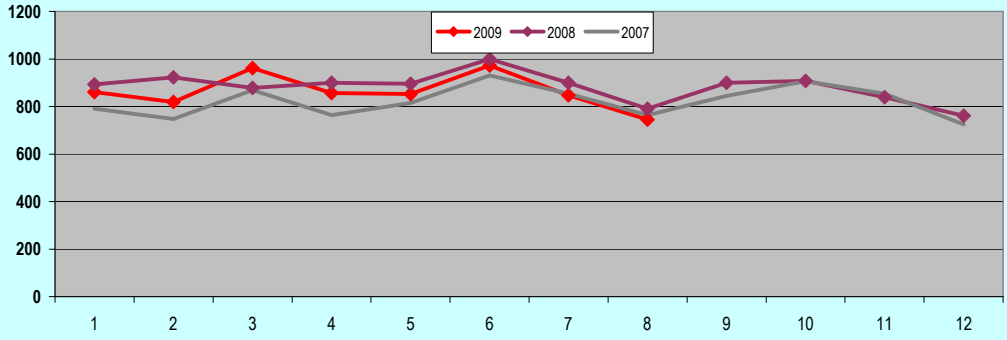
nombre/mois

Bron: NMBS

Source: SNCB

SPOORWEG-REIZIGERS INTERNATIONAAL

aantal/maand



VOYAGEURS en TRANSPORT FERROVIAIRE INTERNATIONAL

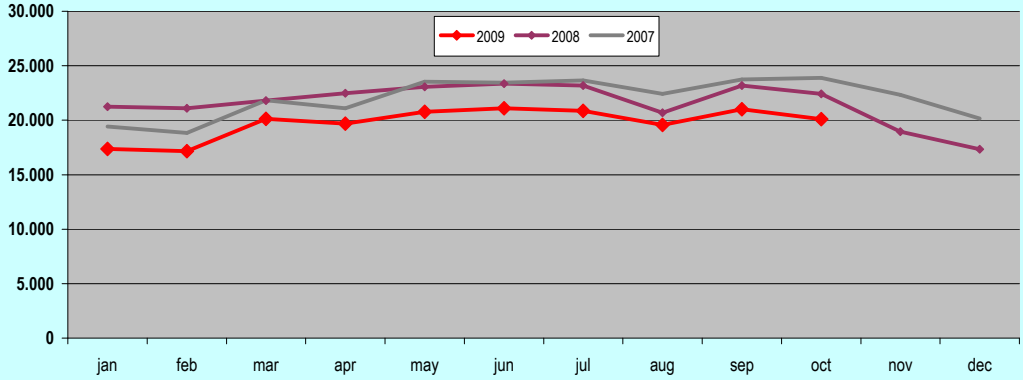
nombre/mois

Bron: NMBS

Source: SNCB

LUCHTVAART-BEWEGINGEN ZAVENTEM BRUSSELS AIRPORT

land. + opstijg.



MOUVEMENTS AERIENS ZAVENTEM BRUSSELS AIRPORT

atterriss. + décoll.

Bron: Belgocontrol

Source: Belgocontrol

GOEDERENVERVOER (nat. & maritiem) TRANSPORT DE MARCHANDISES (nat. & maritime)

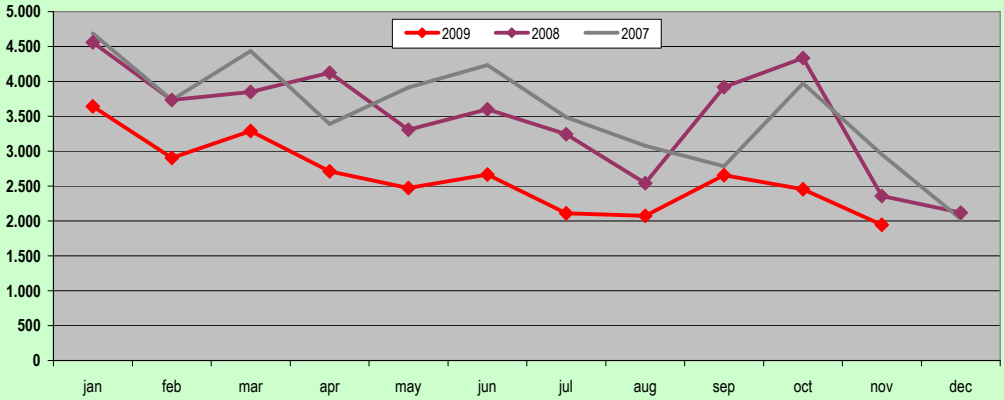
COMMENTAAR:

TRANSPORT OF GOODS - The number of utility vehicles (trucks, etc) registerd in 2009 remained very low, that is at about 61% of the average for the first quarter 2008,.
The same drop can be seen in the turnover of rail transport of goods (in tonnes) that remained around 60% of the 2008 figure,
The same goes for inland navigation, even though few reliable figures are available there.
Activity in the Belgian sea ports is improving since the summer, after a major drop at the beginning of 2009 (-20%) ; however, in september 2009 maritime activity was still 11% below the level of the same month of 2008. Like other ports in the Hamburg-le Havre range, Antwerp suffers, The deep sea port of Zeebrugge is the only Belgian port that seems to maintain its position thanks to important

: COMMENTAIRES

NIEUWE VRACHTWAGENS, TREKKERS & OPLEGGERS ingeschreven bij de DIV

aantal/maand



NOUVEAUX CAMIONS, TRACTEURS ROUTIERS & SEMI_REMORQUES immatriculés à la DIV

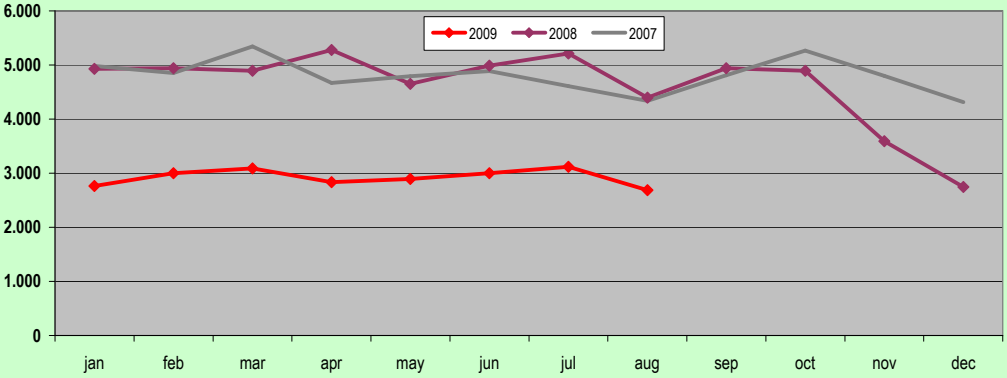
nombre/mois

Bron: FODMV DIV

Source: SPFMT DIV

GOEDEREN-VERVOER PER SPOOR

ton / maand



TRANSPORT FERROVIAIRE de MARCHANDISES

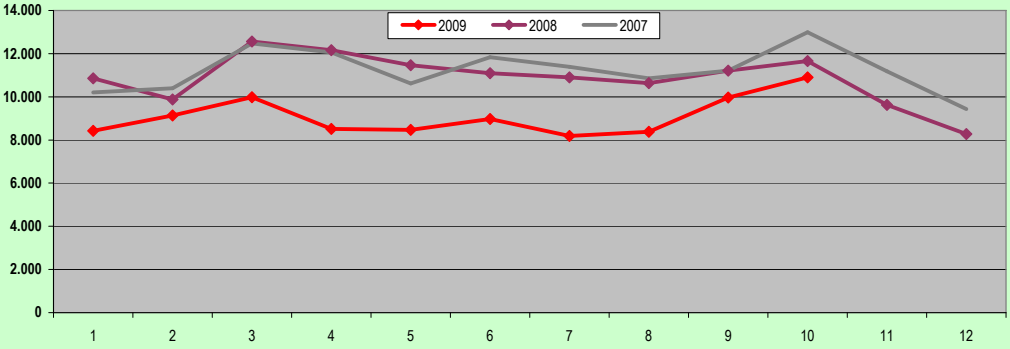
tonnes / mois

Bron: NMBS

Source: SNCB

BINNENVAART

ton / maand



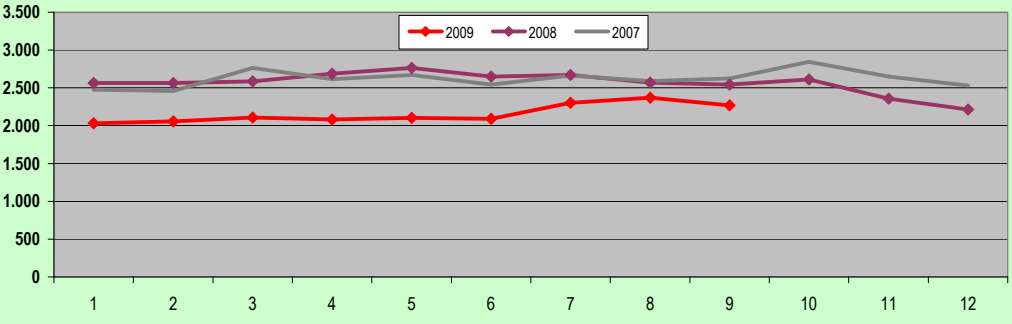
NAVIGATION INTERIEURE

tonnes / mois

Bron: FOD Economie DGEIS (NIS) *raming 2009 naar Dienst Scheepvaart en Zeekanaal* *estimation 2009 sur base Scheepvaart et Zeekanaal* Source: SPF Economie DGIES (INS)

ZEEHAVENS aangekomen schepen

aantal / maand



PORTS MARITIMES navires entrés

nombre / mois

Bron: FOD Economie DGEIS (NIS) *raming april-sept. 09 naar kwartaalcijfers Antwerpen* *estimation sur base Anvers pour avril-sept. 09* Source: SPF Economie DGIES (INS)

TRANSPORT SITUATION IN CANADA IN 2009

1. Traffic trends

Currently, there are only limited 2009 statistics available for the road, marine and rail modes in Canada. Official statistics are published irregularly, dependent on the mode and survey method used. Some 2009 statistics, such as the first 3 quarters of 2009 air traffic volumes and marine activity, are compiled regularly and are provided below.

Air

Using the first three quarters of 2009 preliminary air data, the trend in overall passenger traffic (enplaned and deplaned passengers) shows a moderate decrease compared to the same period in 2008, driven mainly by the global economic crisis. On domestic routes, 23,6 million air passengers travelled inside Canada, a reduction of 9.6 % compared to 2008. On routes between Canada and the United States (US), there was a decrease of 13.6 % in terms of passenger traffic (14.2 million passengers compared to 16.4 million in 2008). Finally, the demand for air travel on other international routes experienced a slight drop of 3.2%.

Based on preliminary data, the amount of goods shipped by air dropped considerably following the onset of the global economic recession. Compared to the first three quarters of 2008, the volume of air cargo transported domestically fell by 11% between January and September 2009, to 301 thousand metric tonnes. The volume of Canada's air cargo trade with the US totalled 133 thousand metric tonnes during the same period, a decrease of 20% relative to 2008. Meanwhile, Canada's air cargo trade with all other countries went down by 15% to 204 thousand metric tonnes.

Domestic and international (to countries other than the US) air passenger volumes are expected to rebound in late 2010, and to fully recover by 2011 or 2012. However, with a deeper recession in the US than the rest of the world, transborder air passenger travel demand is not expected to return to positive growth until 2011/2012.

Marine

Domestic and international marine activity also decreased in 2009 as result of the global recession and the initial contractions of the Canadian economy. In the first quarter of 2009, St. Lawrence Seaway traffic declined 32 % for vessel transits, Port Metro-Vancouver saw a 32 % decline in inbound container traffic, and the Canadian marine sector has seen its international trade value decrease by 14 %.

The Canadian Coast Guard reports that there were fewer cruise vessel voyages in the Canadian Arctic in 2009 than in 2008. However, growth in Arctic cruising is expected to continue into the future. Cargo traffic in the Arctic is expected to increase in proportion with community resupply needs and the demands of resource project cargo. In the Northwest Passage, sea ice conditions and economic factors remain significant impediments to establishing regular transit services, but transit opportunities are expected to increase into the future.

Sustained Canadian and global economic recovery - with projected growth in 2010 and 2011 - is expected to stimulate future growth in Canada's domestic, trans-border and international marine activity in all regions. Marine infrastructure investments under the Building Canada Plan and stimulus initiatives associated with Canada's Economic Action Plan are expected to improve the performance and utilization of Canada's marine infrastructure as well.

2. Obstacles to the development of transport

Problems that have hindered the development of transport in Canada in 2009 include, but are not limited to, the following:

- The recent decrease in transportation-specific expertise at the university level in disciplines such as civil engineering, economics, operations research, etc., threatens the knowledge-base on which transportation technology and innovation depends.

- The lack of established linkages and strong, three-way collaborative efforts among industry, academia and governments is identified as a concern. The shared jurisdiction and the significant coordination and collaboration amongst different levels of government and government agencies that is required to foster innovation across Canada's transportation sector also gives rise to a number of knowledge and data gaps that need to be addressed with limited resources. The lack of data on the current transportation system and its use (e.g. to pinpoint bottlenecks, quantify emissions, holistically analyse household travel, etc.) makes it difficult to identify problem areas and to allocate resources accordingly.

- Canada's efforts to advance environmental sustainability in the transport sector are challenged by high energy demands, as Canada's expansive land mass and dispersed population mean that people and goods must be moved across large distances. Significant progress in the area of environmental sustainability, particularly involving deep reductions in GHGs and air emissions in the short-term, requires new, "outside-the-box" policies that support technological, behavioral and/or cultural change.

- The trade-off between operational/regulatory research and development (short-term perspective) and transformative research (longer-term perspective; new technologies, new markets), as well as competing priorities may hinder innovation. Examples include tensions between: efficiency, security, and individual rights, and massive infrastructure investment requirements and incrementalism.

- Existing market barriers may result in consumers lacking the prerequisite information/knowledge to embrace the value proposition of emergent technologies – or they may be reticent to adopt unproven technologies. These barriers can be institutional or regulatory impediments. High costs and fiscal/funding constraints may constitute another set of barriers. In addition, Canada has a relatively small domestic market and, as such, may face barriers to technology commercialization and market deployment.

- Existing regulatory barriers (competitive dynamics, e.g. seeking returns on investment, a potential barrier to innovation and the adoption of new technologies) – codes, standards and regulations may not encompass innovative or disruptive technologies, potentially creating regulatory delays and impeding innovation.

- With regard to intelligent transportation systems (ITS), funding pressures often mean that investments in large capital infrastructure projects take priority over investments in so-called "soft" or "intelligent" infrastructure (e.g., ITS). As public sector budgets have become more limited due to the economic downturn, more emphasis will need to be placed on such "soft" infrastructure investments to

ensure that the capacity and operating efficiency of transportation systems are fully optimized.

- In addition, increased security requirements from the US department of Homeland Security for moving cargo and personnel across the Canada-US border have proven problematic, and work is ongoing to face these challenges. In 2005 the US *Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users* (SAFETEA-LU) Act introduced security clearance requirements for commercial truck drivers carrying dangerous goods into the US. A bilateral agreement was reached in July 2006 to recognize the clearance process for the Free and Secure Trade Card (FAST) program to meet the US' hazardous materials (HAZMAT) clearance requirements. This interim solution helps mitigate the potential impact of a clearance requirement to Canadian dangerous goods drivers. Multiple initiatives for different modes to pre-clear cargo and personnel (drivers, train engineers and so on) for speedy border crossing are also a factor. For example, in rail cargo, Canadian National (CN) has established, with the custom border agencies, corridor specific pre-processing windows to have entire trains-clear customs within 60 minutes of arrival at the border using Electronic Data Interchange (see http://www.cn.ca/en/customs.htm for more details). On the other hand, Canadian Pacific (CP) uses the Pre-Arrival Review System (PARS) from the Canadian Border Services.

- The Canadian marine sector is experiencing pressure for infrastructure and fleet renewal to accommodate existing and anticipated marine traffic in support of domestic and international trade as well as economic development opportunities.

3. Good practices in the transport sector

SUCCESSFUL POLICY MEASURES RELATED TO ENVIRONMENTAL PERFORMANCE

Climate change adaptation

- Climate change adaptation is an important emerging issue for the transportation sector. Examples of early activities to address climate change adaptation include Transport Canada research into the impacts of permafrost thawing and solutions, changing water levels, arctic shipping impacts, and infrastructure design standards.

Reducing transport related water pollution

- Canada's water resources include 7 % of the world's renewable freshwater and 25 % of the world's wetlands. A range of activity is underway to reduce water pollution from transportation sources. For example, Transport Canada is continuing to advance its clean water objectives by supporting Canada's Northern Strategy and through regulatory and program measures related to marine pollution liability, invasive species/ballast water and ship recycling.

Reducing greenhouse gas and air pollutant emissions

- The transportation sector is responsible for about 27 % of Canada's total greenhouse gas emissions. Rapid sector growth saw transportation emissions increase 50 % faster than overall greenhouse gas emissions between 1990 and 2006. Government of Canada activities to reduce transportation related greenhouse gas and air pollutant emissions include infrastructure spending, ecoTRANSPORT programmes, and regulatory action.

- Federal infrastructure spending through the seven year (2007-2014) $8.8B Building Canada Fund and Canada's $4B infrastructure Stimulus Fund is helping to support initiatives that reduce green house gas and air pollutant emissions in areas such as public transit, short-sea shipping infrastructure, short-line railways. For example, public transit is one of five national priorities under the Building Canada Fund and is an eligible category under the Infrastructure Stimulus Fund. There are also transit-specific funding programmes, including the 2006 Public Transit Fund ($400million), the 2006 Public Transit Capital Trust ($900 million), the 2008 Public Transit Capital Trust ($500 million). As a result, federal investments in public transit have greatly increased in recent years, reaching an estimated $1B in the 2008-2009 fiscal year.

- In cooperation with our National Airports Association (the Canadian Airports Council), Canada has initiated work on the establishment of Airport Emissions Management Plans. The first phase of the plan is to inventory airport greenhouse gas (GHG) emissions. This phase will be completed by the end of 2009. Subsequent phases will involve the identification and implementation of measures to reduce emissions at Canadian airports. The measures implemented will be based on those contained within the International Civil Aviation Organization's (ICAO) Circular 303 on "Operational Opportunities to Minimize Fuel Use and Reduce Emissions."

- Transport Canada continues to address transportation-related greenhouse gas and air pollutant emissions through its ecoTRANSPORT programs. These will deliver over $100M in funding by 2011. Four programs are included in the strategy:

    - The ecoFREIGHT Program is aimed at reducing the environmental and health effects of freight transportation through the use of technology. Transport Canada's ecoFREIGHT program also promotes innovation in the transportation sector through three components: the Freight Technology Demonstration Fund; the Freight Technology Incentives Program; and, the Marine Shore Power. The program provides funding to test and purchase new and underused freight transportation technologies;
    - The ecoMOBILITY Program helps municipalities reduce urban passenger transportation emissions by increasing transit ridership and the use of other sustainable transportation options;
    - The ecoTECHNOLOGY for Vehicles Program involves purchasing and testing a range of advanced technologies and showcasing them at public events across Canada; and,
    - The ecoENERGY for personal vehicles provides Canadian motorists with helpful tips on buying, driving and maintaining their vehicles to reduce fuel consumption and greenhouse gas emissions that contribute to climate change. This program is delivered by Natural Resources Canada.

- Canada is taking regulatory action to address greenhouse gases and air pollutant emissions from the transportation sector that will improve the efficiency of light duty vehicles and increase the level of alternative fuels. For example, Environment Canada is developing new regulations under the Canadian Environmental Protection Act, 1999 that will:

    - Limit greenhouse gas emissions from cars and light trucks, aligning with similar standards that are currently under development in the United States. The new regulations will apply to vehicles starting in the 2011 model year; and,

- Require an average 2 % renewal fuel content in diesel fuel and 5 per cent in gasoline by 2012.

Transport Canada is also currently:

- Developing emission regulations for the Canadian rail sector, in alignment with the Environmental Protection Agency regulations already in force in the United States. These regulations will come into force in 2011;
- Implementing enhanced emissions regulations for vessels operating in waters under Canadian jurisdiction; and,
- Partnering with the United States to establish a North American Emission Control Area for international shipping by 2012.

Memoranda of Understanding have also been developed with a range of industry stakeholders to voluntarily reduce greenhouse gases and other emissions, including within the rail and aviation sectors.

- Canada participated in a 15-member ICAO Group on International Aviation and Climate Change. Through the International Civil Aviation Organization (ICAO), Canada contributed to the development of an international Program of Action to reduce international aviation emissions. Agreement was reached under the Program of Action to improve fuel efficiency by 2% annually on a global sectoral basis to 2050.

Electric and Urban Mobility

- Transport Canada is working with key partners in industry, academia and government to resolve critical technical issues, through research and development, for the advancement of electric drive transportation and urban transit vehicle technology and commercial deployment. Key priority areas under the Electric Mobility Program include electrical storage development, electric drive components development, powertrain optimization, development of relevant codes, standards and regulations and outreach. The Urban Transportation Technology Development Program includes all surface transportation in the urban context such as transit and shuttle buses, medium and heavy duty fleet vehicles as well as passenger fleet vehicles. Key priority areas include vehicle weight reduction, electrification, clean propulsion and powertrain optimization.

SUCCESSFUL POLICY MEASURES RELATED TO INNOVATION

Intelligent Transportation Systems

- Transport Canada released an Intelligent Transportation Systems Plan for Canada that sets out the federal government's strategy for stimulating the research, development, deployment and integration of ITS investments in Canada. The strategy has been a complete success, leading to widespread deployments and the creation of ITS Research and Development centres of excellence.
- The ITS Architecture is the foundation for the deployment of ITS in Canada as it promotes systems interoperability and integration. Originally developed in 2001, it is currently being updated to include security, border and corridor elements as well as to account for new mobile wireless communications technology.
- Advanced Traveller Information System (ATIS): This project consolidates data from multiple transportation agencies regarding travel conditions, schedules, etc. for various modes and border crossings. The resulting ATIS offers users a one-

stop public web-portal that provides multi-modal, multi-jurisdiction, static and real-time traveler information.
- 511: A designated three-digit telephone number that provides real-time travel and weather information. The types of information available through the 511 system include: winter road conditions, road work, major incidents, weather alerts, and waiting times at border crossings.
- *National Road Weather Information System*: A nation-wide system of sensors embedded in and below the road surface and on nearby towers that collect detailed data on air temperature, relative humidity, wind direction and precipitation. This data is used to make forecasts regarding icing conditions and in turn, provide critical information to road maintenance authorities.
- Smart corridor initiatives: Advanced technologies (e.g., ITS), in corridors of high volume and value, are being implemented in various locations in Canada to ensure the seamless intermodal connections for the movement of freight and for the safe and efficient operation of roadways for network users. Integrated implementation of technology systems will focus on traffic and incident management, traveller information, tolling operations, truck reservation systems for port access, border wait time measurement and reporting and other cross-border applications.

Transportation Technology, Research and Development (R&D)
- In 2008-2009, R&D undertaken to support Transport Canada's safety and security mandate will be complemented by and/or integrated into other research and development work focused on key departmental research priorities such as improving transportation in gateways and corridors and the North, to increase accessibility and energy efficiency, and working with stakeholders to minimize the environmental footprint of transportation.
- *Fatigue Risk Management System for Canadian Aviation* to provide a "toolbox" for guides, templates, training materials, etc. to help companies develop their own fatigue risk management policies and practices.

Innovation and Change Agenda (emerging priority)
Activities are underway to:
- Encourage the sector to develop and implement forward-looking solutions to challenges facing the Canadian transportation system;
- Promote best practices in innovation, improved technology applications and enhanced transportation research capacity;
- Increase knowledge generation and exchange among industry, academic institutions and governments; and,
- Align research and development capacity in Transport Canada with a transportation sector Innovation and Change Agenda, including public interest research and development in areas where Canada has strategic opportunities and niches.

SUCCESSFUL POLICY MEASURES RELATED TO AIR TRANSPORT

- Following the historic negotiation of the Canada-US Open Skies agreement in November 2005 and the launch of the Blue Sky international air policy in November 2006, the Government of Canada has negotiated twenty two (22) air service agreements covering a total of 46 countries – all of which promote the efficiency of the air sector. Specifically, seven (7) bilateral Open Skies-type agreements: Ireland, Iceland, New Zealand, Barbados, the Dominican Republic, Costa Rica and South Korea; eight (8) expanded bilateral agreements: Mexico, Japan (2 separate agreements), Jordan, Singapore, the Philippines, Cuba and

Morocco; and, six (6) new bilateral agreements: Kuwait, Serbia, Croatia, Panama, Turkey and South Africa.

- Additionally, the Blue Sky policy has also yielded the historic negotiation of a comprehensive air transport agreement between Canada and the European Union covering all 27 Member States, which effectively equates to 27 "open" bilateral air services agreements (ASAs) – this agreement, once signed and applied, will supersede the existing bilateral agreements with all EU Member States including the Open Skies-type agreement concluded with Ireland under the Blue Sky policy. More new and expanded ASAs are expected in 2009/10.

- When including the Open Skies agreement with the US (negotiated in 2005, but signed in 2007), the overall percentage of Canada's international traffic covered by these agreements is 84 per cent. To date, Canada has achieved an open agreement with a total of 34 countries representing 72 % of its international air traffic.

- Transport Canada has been working on the implementation of safety management systems (SMS) in large air carriers and related approved maintenance organizations since 2005. Transport Canada adopted a 39 months phased in approach to compliance rather than an immediate approach to compliance. The intent was to provide organizations with the time to build not only compliant but effective SMSs.

- An SMS is a series of integrated processes that support a company's ability to manage risk and continual compliance with government safety regulations proactively. These processes strengthen a company's capacity to address safety issues before they lead to an incident or accident. They will also lead to higher levels of compliance with regulations only confirmed through Transport Canada inspections. The benefits of SMS are better, informed decision-making; improved safety through hazard identification and occurrence/accident avoidance; better resource allocation that will result in increased efficiencies and reduced costs; a strengthened corporate culture; and higher levels of compliance with government regulations. Sixty-nine certificate holders now have fully implemented safety management systems. In statistical terms, this means that 95% of the passengers flown in Canada today are transported on airlines that have a SMS in place. In 2009, ICAO published standards and recommended practices requiring all member states to have SMS requirements in place. Transport Canada is considered a world leader in SMS and has been used as a role model by other regulatory authorities. SMS has improved upon Canada's already excellent safety record and has provided a mechanism by which Certificate Holders can continue to proactively improve their own safety level.

- The Government of Canada approved legislative amendments in 2009 to allow an increase in the limit on foreign ownership of voting interests in Canadian airlines from 25 to 49 %. Relaxing the foreign ownership limit from the current 25 % level to 49 % of voting interests would broaden the pool of capital available to Canadian carriers. In addition, raising foreign ownership limits to 49 % would place the Canadian regime on par with those of some of our trading partners. Regulations are currently being develop to implement the change to legislation

SUCCESSFUL POLICY MEASURES RELATED TO MARINE TRANSPORT

- In 2009, Transport Canada amended the *Arctic Waters Pollution Prevention Act* to extend Canada's Arctic shipping pollution prevention rules to 200 miles offshore, the limit of Canada's Exclusive Economic Zone. This serves to exercise Canada's stewardship over Arctic waters and enhance protection from pollution. Transport Canada also supports the international adoption of mandatory measures for ships operating in polar waters.

- Canada is party to several international marine instruments that provide a level playing field for international shipping by reducing unfair competition from substandard ships. There are nine international conventions that Canada is moving forward for ratification/accession. These various instruments cover the well-being of individuals, safety and environmental issues in the marine sector.

- Finance Canada published a Gazette Notice on October 24, 2009 to waive the duty on certain types of vessels greater than 129 metres in length. This measure has the potential to contribute to improved efficiency, safety and environmental performance of the Canadian marine fleet by stimulating fleet renewal.

SUCCESSFUL POLICY MEASURES RELATED TO GATEWAYS APPROACH

Asia-Pacific Gateway and Corridor Initiative (APGCI)

- With a mission to establish Canada's Asia-Pacific Gateway and Corridor as the best transportation network facilitating global supply chains between North American and Asia, the APGCI has, since its launch in October 2006:
    - Persuaded governments and private interests to collaborate in making strategic investments and decisions to improve the transportation system. Since October 2006, almost $2.8 billion in projects have been announced by the governments of Canada, together with western provincial and municipal governments and the private sector, including more than $1 billion in federal contributions
    - Supported the formation of partnerships in order to leverage funding for infrastructure investments and in working together to address cross-cutting issues of:
        - Reliability
        - Security
        - Competitiveness
    - Implemented a systems-based, as opposed to modal-based, approach to investments and improving intermodal connections
    - Brought diverse groups of transportation leaders (and competitors) together for the first time to promote the system "as a whole" to key Asian markets
    - Succeeded in building the profile and interest in the APGCI and Gateway concept internationally, as evidenced by specific references to the APGCI by Prime Minister Harper and Chinese Premier Wen Jiaboa on December 4 and December 3, respectively, 2010.

Value-Added Initiatives

- Significant progress is being made to build on the success of the APGCI and focus on ways to attract and retain the economic value associated with gateway investments, i.e., to increase wealth generation, job creation and contribute to long-term sustainable economic growth.

- Value-added Gateways initiatives go beyond traditional bricks and mortar and examines the challenges and opportunities to maximize Canadian content along global value chains, to help make Canada more competitive in international commerce, including measures to:
    - Raise awareness of Canada's tax and duty deferral advantages, including enhanced marketing of our foreign trade zone-type programs;
    - Streamline existing regulations, e.g., the proposed relaxation of tariff regulations on international maritime containers and elimination of the 25% duty on foreign-built ships; and
    - Address skills and labour shortage issues through an industry-led Asia-Pacific Gateway Skills Table.

4. Transport infrastructure investment

Year	GDP[1]	Net Capital Stock (NCS)	NCS[2] as % of GDP	Investments[3]	Investments as % of GDP
2003	1 175 635	113 215	9.63%	10 566	0.89%
2004	1 210 894	113 400	9.36%	10 467	0.86%
2005	1 245 723	114 896	9.22%	13 470	1.08%
2006	1 283 518	117 382	9.15%	15 193	1.18%
2007	1 317 068	120 869	9.18%	19 220	1.46%
2008	1 313 295	125 369	9.55%	22 973	1.75%

PARTIAL SUMMARY OF MEASURES ADOPTED IN 2009 THAT SUPPORT TRANSPORTATION INFRASTRUCTURE:

Accelerating Existing Infrastructure Initiatives under Building Canada, including $500 million Bonus for Community Projects

- As part of its Economic Action Plan, Canada has accelerated and topped-up existing Building Canada Initiatives.
- Eligible investment categories include Core National Highway System, Short-Sea Shipping, Shortline Railways, Local and Regional Airports, Public Transit and Local Roads.

Infrastructure Stimulus Fund

- Canada's 2009 Budget (Budget 2009) establishes a new $4 billion Infrastructure Stimulus Fund that will provide funding to provincial, territorial and municipal infrastructure rehabilitation projects. Funding will be available for two years for projects that will begin construction during the 2009 and 2010 construction seasons.
- Eligible projects under the Infrastructure Stimulus Fund are for the rehabilitation or retrofit of existing infrastructure assets, or the construction of new infrastructure asset that can be substantially completed before March 30, 2011. Eligible investment categories include Highway Infrastructure, Local Road Infrastructure, Regional Transit Infrastructure and Port and Cruiseship Infrastructure.

Public Private Partnerships (PPP) Canada

- The Government of Canada recently established PPP Canada, a Crown Corporation to support the development of public-private partnerships (P3) and facilitate the development of the Canadian P3 market. The Government of Canada also

[1] All amounts in Canadian dollars and in millions unless otherwise noted.

[2] Net Capital Stock is gross capital stock depreciated on a straight line basis at constant 2002 $ for the transportation engineering construction component of engineering construction for all industries.

Capital stocks are reproducible tangible assets that are used as factors of production in combination with other factor inputs such as labour, energy and other natural resources or materials. The stock of capital consists of building construction (such as plants and offices), engineering construction (such as roads and dams) and machinery and equipment used in the production process.

More information on this is found at the following link:
http://www.statcan.gc.ca/imdb-bmdi/document/2820_D1_T9_V1_B.pdf

[3] Transportation investments are also in constant 2002 $. This definition comprises establishments primarily engaged in transporting passengers and goods, warehousing and storing goods, and providing services to these establishments. The modes of transportation are road (trucking, transit and ground passenger), rail, water, air and pipeline.

National post office and courier establishments, which also transport goods, are included in this sector. Warehousing and storage establishments are subdivided according to the type of service and facility that is operated.

established a $1.2 billion fund, managed by PPP Canada, to support P3 infrastructure projects (including transportation-related projects). PPP Canada's initial call for P3 proposals closed on October 30, 2009.

INVESTMENTS IN FEDERAL INFRASTRUCTURE PROJECTS

Rail

- In 2007, the Government provided $516 million for a medium-term investment plan to address the reliability and integrity of VIA Rail Canada's operations. Budget 2009 builds on this investment by providing an additional $407 million to VIA Rail Canada to undertake infrastructure and other capital improvements.
- Budget 2009 also provides $43.4 million over five years to Transport Canada for rail safety initiatives to enhance its regulatory oversight and enforcement capacity, and conduct research and development projects to advance new safety technologies.

Trans-Canada Highway

- Budget 2009 provides $130 million on a cash basis to Parks Canada to complete the last phase of this project, which will consist of twinning a section of the Trans Canada Highway from Lake Louise Village to British Columbia.

Federal Bridges

- Over the past two years, the federal government has invested nearly $150 million in improving the safety and longevity of federal bridges. Budget 2009 builds on these investments and provides funding for the following bridge rehabilitation projects:
- The Champlain Bridge, Canada's busiest bridge, will receive $212 million for renewal. The Champlain Bridge links traffic going to and from the Island of Montréal and is a key connection for truck traffic heading to or returning from the United States. Rehabilitation work will ensure that the bridge can continue to sustain traffic volumes and provide long-term safety benefits.
- The Blue Water Bridge in Sarnia and the Peace Bridge in Fort Erie, which are two of the busiest US-Canada border crossings, will receive up to $14.5 million. These projects will help to reduce traffic congestion and facilitate local border crossings.
- Other federal bridges in need of rehabilitation - including several in the National Capital Region, the Burlington lift Bridge in Burlington and the LaSalle Causeway in Kingston - will receive up to $42 million.

Small Craft Harbours

- Budget 2009 provides up to $200 million to dredge the approaches and accelerate the repair and maintenance of core commercial fishing harbours across Canada

Border Facilities

- The Government will invest $80 million to ensure that Canada's shared border with the United States remains secure and efficient.

Aviation Security

- Budget 2009 provides $282 million over the next two years for measures that will support the development of aviation security plans, improve operations of the Canadian Air Transportation Security Authority (CATSA), and implement a new passenger assessment system.
- Budget 2009 also provides $14 million in 2009-10 to support the implementation of a new security program for cargo that departs from Canadian airports.

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TRANSPORT SITUATION IN THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA IN 2009

1. Traffic trends

Road transport: Passenger transport	**2001**	**831.000**	
	2004	**1.110.000**	
	2007	**1.136.000**	
First 9 months	**2009**	**901.000**	**(passenger-kilometre)**
Rail Transport: Passenger transport	**2001**	**133.000**	
	2004	**94.000**	
	2007	**109.000**	
First 9 months	**2009**	**114.000**	**(passenger-kilometre)**
Road transport: Freight road transport	**2001**	**2.311.000.000**	
	2004	**4.004.000.000**	
	2007	**4.563.000.000**	
First 9 months	**2009**	**2.971.000.000**	**(tonne-kilometre)**
Rail Transport: Freight rail transport	**2001**	**462.000.000**	
	2004	**426.000.000**	
	2007	**778.000.000**	
First 9 months	**2009**	**358.000.000**	**(tonne-kilometre)**

In Republic of Macedonia we have a reduction of 25 per cent of the number of transported passengers and reduction of 30 per cent of transport of goods. We expected increasing in next period.

2. Obstacles to the development of transport

Obstacles to the development of transport in Republic of Macedonia are the administrative barriers (permits-licences for transport of passengers and goods, visas for professional drivers, long procedures for customs formalities), congestion on the border crossings and bottlenecks, poor infrastructure. Measures of the harmonization of the legislation, improving of infrastructure, corporation on regional level, cross-border cooperation and facilitation.

3. Good practices in the transport sector

For improve the efficiency, safety and/or environmental performance of the transport, Ministry of Transport and Communications have adopted National Transport Strategy (2009-2015) with measures and action plan. For improving the road traffic safety Assembly of the Republic of Macedonia have adopted National strategy for road traffic safety with expected reduce of fatalities for 50 per cent and 0 children victims in traffic.

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TRANSPORT SITUATION IN GERMANY IN 2009

1. Traffic trends

- The freight sector in Germany is - on the whole as well as with regard to all transport modes - heavily affected by the decline in industrial production and by the massive drop in external trade flows.
- In the first half of 2009, the traffic volume of the modes rail, inland waterways and maritime shipping fell by approximately 20 per cent from the preceding year. The road haulage sector performed slightly better (-12 per cent).
- Despite improvements in the second half of the year, a drop in transport demand by 13 per cent is to be expected for the full year 2009. Transport volumes in passenger transport are expected to be close to stagnation for all modes in 2009.
- For 2010, the overall economic and sectoral economic data indicate a slight recovery in the freight transport sector. The anticipated increase is currently estimated at approximately 2 per cent (rail) and approximately 4 per cent (road haulage, air transport, maritime shipping).

2. Obstacles to the development of transport

The year 2009 was characterised by the **financial and global economic crisis,** which, for Germany, led to the most severe economic downturn since the foundation of the Federal Republic. After one year of economic downturn, German's economy overcame the decline in the summer of 2009. Against this background, a GDP decrease of 5.0 per cent is now expected for the full year. For companies in the transport and logistics sectors, the crisis manifested particularly clearly in terms of a decline in freight volume.

To mitigate the effects of the crisis, the Federal Government has, in close consultation with the international community, taken comprehensive crisis management measures. Important elements of these measures are the **economic stimulus packages** with a total volume of close to € 100 billion: the **Economic Stimulus Package I** of November 2008 (package of measures entitled "Safeguarding Jobs by Promoting Growth") and the **Economic Stimulus Package II** of January 2009 ("Pact for employment and stability"). For the Federal Government it was particularly important that these economic support measures take into consideration long-term challenges and boost the overall growth strengths.

- Against this background, the economic stimulus packages facilitate a faster implementation particularly of urgent investment in transport infrastructure – for this, an additional € 4 billion have been made available for developing the federal transport infrastructure in 2009 and 2010. These funds serve the implementation of the following measures in particular: Strengthening of ongoing and new transport infrastructure projects, noise mitigation measures, passenger station programme for the acceleration of the refurbishment of train stations, construction of urgently needed HGV parking spaces on parking sites along federal motorways, upgrading of seaward approaches and of the hinterland connections of the ports.
- With its scrappage scheme (volume: € 5 billion) the Federal Government provides incentives for the scrappage of old and the purchase of new cars, thereby boosting sales in the automobile sector and making an important contribution to the reduction of air pollution.
- For 2009 and 2010, € 500 million have been made available for applied research in the field of mobility, specifically for innovations in the field of transport and vehicle technology. This is essentially intended to promote the entire emerging sector of electric mobility (further development in particular of fuel cells and storage technologies as well as hybrid propulsion systems).

3. Good practices in the transport sector

The Federal Government is committed to an **integrated transport policy**, since solely optimising the transport sector subsystems will not be sufficient considering the future challenges the transport system as a whole faces in terms of efficiency and sustainability. Instead, comprehensive strategic approaches are needed which, apart from the shaping and financing of transport infrastructure, also incorporate all further transport policy areas, such as pricing and innovation policies, to form a sound overall approach. With its integrated transport policy, the Federal Government thus seeks to ensure that each transport mode can and must make its contribution to safeguarding mobility and tackling traffic growth according to its inherent strengths.

Important strategic approaches in this context are approaches such as the **Masterplan Freight Transport and Logistics** with which the Federal Government, in the summer of 2008, presented a comprehensive strategy for freight transport. For the important transport hubs - airports and ports - the Federal Government presented respective integrated strategies in the summer of 2009.

- the **Airport Strategy 2009** is the foundation for a sustainable and requirement-oriented development of the German airports;
- the **National Ports Strategy** is a strategic federal guideline for the seaports and inland ports;
- and also the **promotion of combined transport** is given high priority by the Federal Government within the framework of the Masterplan Freight Transport and Logistics; thus funding for transhipment facilities and for the promotion of innovative transhipment technologies has been increased.

Furthermore, the successful toll scheme for **heavy goods vehicles (HGVs)** has been refined, giving preferential treatment to low-emission HGVs and raising toll rates according to the pollutant emission category. The new scheme came into operation on 1 January 2009. In return, compensation measures totalling € 600 million per year are ensured in order to ease the burden on the road haulage sector including an Innovation Programme to provide incentives to purchase cleaner heavy goods vehicles, a Training Aid Programme and a De-Minimis Aid Programme to improve the efficiency, safety and environmental performance of the transport sector in Germany. The remaining toll revenues will be re-invested in transport infrastructure.

4. Transport infrastructure investment

Please provide estimates of the percentage **share of transport infrastructure investment** in GDP in recent years and describe briefly the measures adopted in 2009 that aim to **support transport infrastructure investment** (fiscal stimulus provisions, regulatory reforms to encourage private investment, etc).

The following table provides information on transport infrastructure investment in Germany broken down by years, source of funds and use of funds. Furthermore, the GDP at current prices and the resulting share of total investment is provided in per mille.

Year	**Federal Government** investment incl. Economic Stimulus Packages I and II					**Total investment incl. federal states and local authorities**	**GDP at current prices**	**GDP share of infra-structure investment**
	Federal railways	*Federal trunk roads*	*Federal waterways*	*Other areas (GVFG*, aviation...)*	*Federal Government total*			
	[Million euros]					***[Million €]***	***[Billion €]***	***[1/1000]***
2000	*3,363*	*4,173*	*620*	*1,743*	*9,899*	**21,270**	**2062.50**	**10.31**
2001	*3,865*	*4,659*	*555*	*1,730*	*10,809*	**20,743**	**2113.16**	**9.82**
2002	*4,294*	*4,713*	*554*	*1,880*	*11,441*	**22,451**	**2143.18**	**10.48**
2003	*4,451*	*4,653*	*609*	*1,912*	*11,625*	**21,591**	**2163.80**	**9.98**
2004	*3,518*	*4,928*	*600*	*1,888*	*10,934*	**19,798**	**2210.90**	**8.95**
2005	*3,442*	*5,193*	*611*	*1,850*	*11,096*	**17,425**	**2242.20**	**7.77**
2006	*3,398*	*5,144*	*590*	*1,961*	*11,093*	**18,141**	**2325.10**	**7.80**
2007	*3,953*	*4,890*	*682*	*1,889*	*11,414*	**18,797**	**2428.20**	**7.74**
2008	*3,860*	*5,027*	*811*	*1,942*	*11,640*	**-**	**2495.80**	**-**
2009 (target)	*4,320*	*6,300*	*1,320*	*2,033*	*13,973*	**-**	**-**	**-**

*Local Authority Transport Infrastructure Financing Act

In 2008/2009, two economic stimulus packages were launched in support of the economy that also make provisions for additional transport infrastructure investment. The Economic Stimulus Package I was adopted in November 2008. On 20 February 2009, the German Bundesrat approved the "Act for employment and stability in Germany" (Economic Stimulus Package II) following its adoption by the Bundestag. These economic stimulus packages will provide additional funding in the total amount of € 4 billion for federal transport infrastructure in 2009 and 2010.

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TRANSPORT SITUATION IN LITHUANIA IN 2009

1. Traffic trends.

Lithuanian transport development indicators and forecasts are provided in the table below:

Data	Units	2007	2008	2009*	2010*	2011*	2012*
Freight transport	mill.t	**122,4**	**120,7**	**95,37**	**89,3**	**92,4**	**96,45**
Railway transport	mill.t	53,5	55	41,5	40	41	43,0
Road transport	mill.t	62,2	59,4	43,4	42,5	44	45,5
Maritime transport	mill.t	5,8	5,3	6,6	6,0	6,5	7,0
Inland waterways transport	mill.t	0,96	0,99	0,92	0,8	0,9	0,95
of which in Klaipėda State Seaport	*mill.t*	***27,4***	***29,9***	***27,3***	***28,0***	***28,5***	***29,5***
of which in the Klaipeda State Seaport and Butinge Sea Terminal)	*mil.t*	***31,9***	***38,9***	***35,8***	***37,0***	***37,5***	***39,0***
Passenger transport	mill. pass.	**471,7**	**476,7**	**399,8**	**402,1**	**407,5**	**415,3**
Railway transport	mill. pass.	5,2	5,1	4,5	4,2	4,5	5,0
Road transport (buses+trolleybuses)	mill. pass	463,3	468,3	392,3	395,0	400	407,0
Inland waterways transport	mill. pass.	2,33	2,37	2,0	1,95	2,0	2,3
Maritime transport	thous. pass.	223	226	220	200	210	220,0
Air transport	thous. pass.	755	1161	720	740	755	800,0
Passenger traffic at Lithuanian airports	*thous. pass.*	***2197***	***2553,2***	***1930***	***2000***	***2100***	***2250***

*Estimation/Forecast

Contribution of transport and warehousing sector to the total Lithuanian GDP is estimated at 10 per cent in 2009. 6,3 percent of total number of persons employed has been employed in this sector in 2009.

Freight transport

According to preliminary forecast, cargo volumes (by all modes of transport, not including pipelines) will decrease by 21 per cent in 2009 comparing with 2008.

Only volumes of goods handled in the Klaipeda State Seaport have decreased by 8,6 percent in 2009 comparing with 2008. A significant decrease is seen in container handling: 243 thous. TEUs will be handled in 2009, it is by 35 percent less if compared with the last year. Klaipeda State Seaport and Butinge Terminal will handle over 35,8 mill. t. of cargo in 2009.

Similar trends of decreasing cargo transportation will remain in 2010. Recovery of cargo volumes will most likely start in 2011. Railway transport compare to roads will increase its share of cargo, thus even more contributing to good intermodal breakdown – almost 47 per cent of all cargo transported.

Volumes of **passengers transportation** by all modes of transport in 2009 decreased by 16,2 per cent compare to 2008. Nevertheless, forecasts show trends of slight increase already in 2010.

First time after steadily growing traffic of passengers at international airports (Vilnius, Kaunas and Palanga), 2009 were off-year for aviation sector: the number of passengers in the international airports decreased by 24,4 per cent.

2. Obstacles to transport development

Main problems that have hindered the development of transport in Lithuania during 2009 are:

Lack of public logistic centres hinders an effective interaction among modes of transport in the development of multimodal transportation services.

Underdevelopment of infrastructure connections with the EU Member States and third countries do not allow full utilisation of transit opportunities and development of multimodal and intermodal transport.

Insufficiently developed network of access connections (road and railways) to the Port of Klaipeda.

Insufficiently developed inland waterways transport sector (old fleet, which is of average age more than 30 years; differences of depth in the separate parts of the main inland waterway of international importance Kaunas–Klaipeda (E41); the lack of appropriate cargo and passengers ports and ports' infrastructure).

Inadequate railway infrastructure for freight transportation in the North – South direction (Rail Baltica line of Corridor I in the direction of Poland). Inadequate railway infrastructure for passenger transportation, limited trains speed, passengers transport services are loss-making.

Border crossing is still a problem. Lithuania has external EU borders with Russia and Belarus and there is a lack of proper non-EU countries infrastructure which determines longer and more complicated border crossing procedures. Lithuania strives for harmonising the border control procedures, some good practice examples are already put in practice (the streamlined border crossing procedure for shuttle combined transport train "Viking" – line Klaipėda-Vilnius-Minsk-Odessa-Ilytschiovsk).

3. Best practices in transport and infrastructure regulation.

During 2009 good results were achieved in traffic safety domain. Previous constantly growing accident rate was stopped in 2008. In the period of 11 months of 2009 these results were achieved:

- reduction of number of killed in the roads by 28 per cent comparing the 11 months of 2009 with the same period of 2008.
- Reduction of number of injured people during traffic accidents by 24 per cent.
- less by 901 traffic accidents during 11 months period in 2009 comparing with 2008.
- less by 1 275 injured people in the accidents during 11 months period in 2009 comparing with 2008.

This was achieved mainly by implementing the traffic safety policy objectives and measures foreseen in State Programme for Road Safety for 2005–2010 and Law on Safe Traffic in Roads. Those measures helped to increase the rate of using safety belts, to reduce the number of drivers intoxicated with alcohol and narcotic and psychotropic substances, and to make speed control stricter. Further measures are foreseen to improve driver training and examination, pedestrian and cyclists' safety, traffic culture, education of traffic participants, and work of traffic control, medical aid and rescue

services. Deployment of automatic speed control radars (stationery and mobile) on the E-category roads.

4. Transport infrastructure investment

1,74 per cent of GDP was allocated for modernisation of transport infrastructure in 2009.

5. Relevant transport policy initiatives

The first Asia-Europe (ASEM) transport ministers' meeting was initiated by Lithuania and took place in Vilnius on 19-20 of October 2009.

Noting with appreciation, among others, the positive contribution of the UNECE and UNESCAP to the development of transport in Asia and Europe, Ministers adopted the Vilnius Declaration, which decided to develop a strategic plan on the Development of Asia and Europe Transport to provide Policy directions for the future development of trans-Asia-Europe transport corridors, as well as to outline an ASEM Action Plan by formulating Transport Policy Guidelines, sharing good practices as well as statistical data and identifying areas of co-operation in the field of transport. Also the Declaration encouraged international financial organizations to enhance funding for transport infrastructure construction in Asia and Europe, taking into account the routes of the Euro-Asia Transport Links recommended by the UNECE and UNESCAP, with a view to completing expeditiously the priority rail and road linkages connecting Europe and Asia. Also it was agreed to hold the ASEM Transport Ministers' Meeting every two years alternatively in Europe and Asia, and in this regard establish the Senior Officials Meeting (SOM), which will prepare the Action Plan for presentation at the second ASEM TMM.

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TRANSPORT SITUATION IN THE NETHERLANDS IN 2009

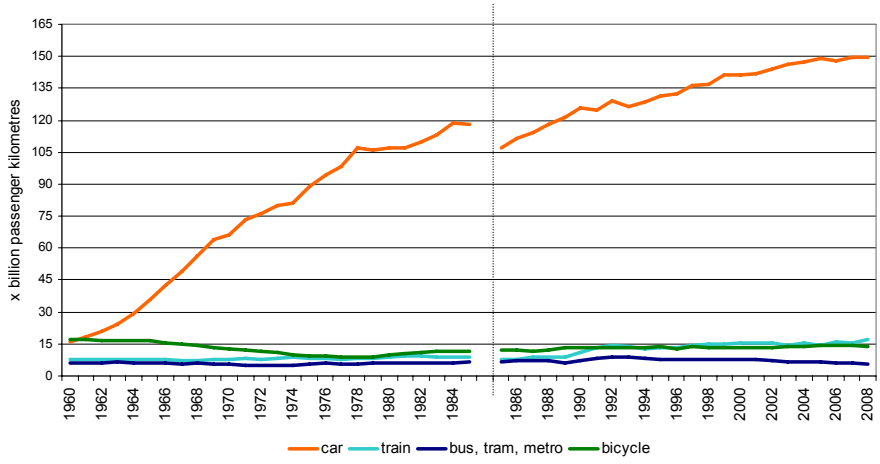
1. Traffic trends

No definite figures on 2009 are available yet. Hence we give you an historic overview up to 2009. However, we have seen a reduction in traffic volumes during 2009 as a result of the economic crisis. From earlier studies and research we do expect that the traffic volumes for 2010-2012 will roughly continue their trend from before the economic crisis once this is over.

Development of passenger transport

Since 1985, the mobility of the Dutch population aged 12 years and older has increased by nearly 40 percent to a total of 171 billion passenger kilometres. This growth occurred primarily in the late 1980s and late 1990s. Since 2000, the total mileage has also increased, but to a lesser degree - only 5 percent. Travel distances increased, from an average of 28 kilometres per person per day in 1985 to 35 kilometres per person per day in 2008. The growth of mobility is virtually synonymous with an increase in car use. Over a long period of time (1960-2008), the number of kilometres travelled by car has especially increased in comparison to other transport modes (Figure1). Car use has increased by 54 percent since 1985[1].

FIGURE 1 Development of passenger kilometres per transport mode, 1960-2008 (in billion passenger kilometres).



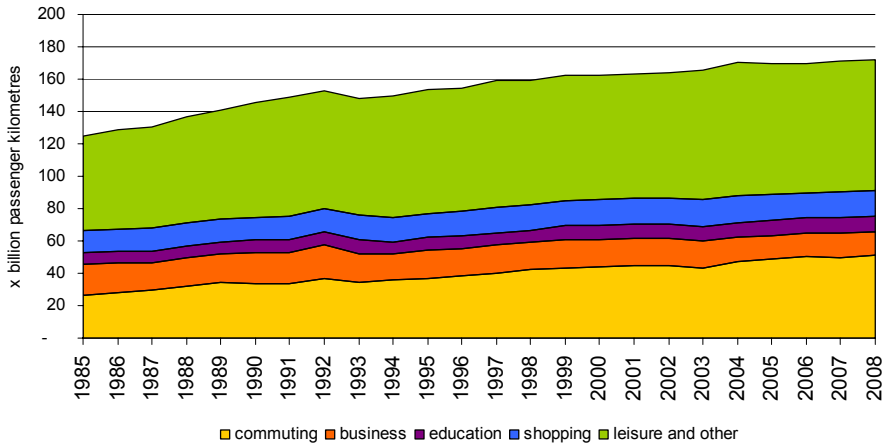
In 2008, approximately half of all trips were undertaken by car; 1 out of every 20 trips by public transport and one quarter of all trips by bicycle. These proportions in the use of various transport modes have remained relatively unchanged since 2000.

People undertake trips for various purposes: going to and from work, shopping, visiting family and friends, and pursuing various types of leisure activities are all reasons for travel. The distribution of passenger kilometres by travel purpose reveals two striking results (Figure 2). First, roughly half of all passenger kilometres are made for social-

[1]Jorritsma, P et al.: *Mobiliteitsbalans 2009*. Report KiM The Netherlands Institute for Transport Policy Analysis, The Hague, 2009

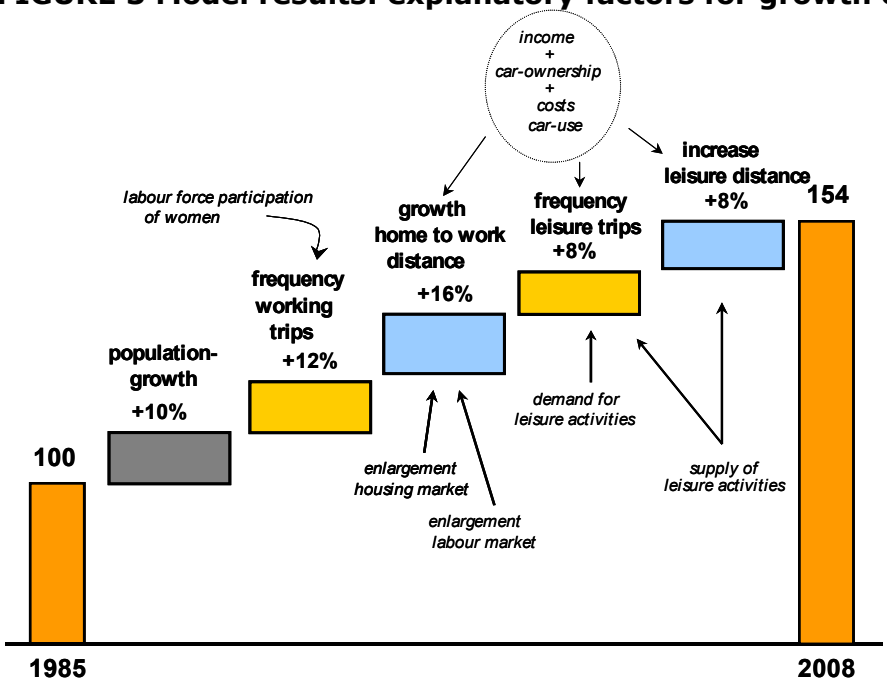
recreational purposes. Second, the growth in passenger kilometres is primarily due to the growth in commuting. In 1985, commuting accounted for 'only' 25 billion passenger kilometres. Some two decades later, this figure had doubled to 50 billion passenger kilometres in 2008. The increases in employment levels and the distances people travel from home to work and vice versa accounts for the increase of commuting in the total growth of passenger kilometres. The home to work distance increased from 12 kilometres (one-way trip) in 1985 to 17 kilometres in 2008. The average distance for commuting by car increased most significantly, from 15 kilometres in the mid-1980s to 22 kilometres in 2008 (+ 42 percent).

FIGURE 2 Distribution of passenger kilometres by purpose, population 12 years and older, 1985-2008.



The Netherlands Institute for Transport Policy Analysis (KiM) has developed a simple model that explains the growth of personal mobility over the period 1995-2008, using demographic, socio-cultural, economic and spatial factors based on the Dutch National Mobility Survey. Figure 3 shows the results of the model for the years 1985 to 2008.

FIGURE 3 Model results: explanatory factors for growth of car use 1985-2008.



From 1985 to 2008, car use increased by 54 percent. This increase is largely the effect of changes in behaviour among the Dutch population; in particular, the increase of travel distances and number of trips contribute to the total growth by 24 and 20 percent, respectively.

Freight transportation: increasingly international and intercontinental

Freight transportation increased by 21 percent between 2000 and 2008, or by an average rate of 2.4 percent per year. International freight transport rose more sharply (27 percent) than national freight transport (11 percent). International transport will continue to claim an increasingly larger share of all freight transportation. In 2008, international transport accounted for 66 percent of all freight transportation. In 2008, 41 percent of all freight transportation went by road, 3 percent by rail, 31 percent by sea, 18 percent by inland waterways, and 7 percent via pipelines.

In terms of freight tonnage, sea transport and road transport enjoyed the largest increases between 2000 and 2008. In percentage terms, however, freight transportation by rail enjoyed the highest growth rate (62 percent) during this period, and, although the volumes are still relatively small, freight transport by rail is clearly making a 'comeback' (see also table 1).

TABLE 1: Freight tonnage

Source: KiM, 2009, Mobiliteitsbalans 2009, Den Haag: Kennisinstituut voor Mobiliteitsbeleid

	Year 2008
FREIGHT TRANSPORT	
Continental (billion ton kilometres)	121.8
Road	55.3
Inland waterways	43.2
Rail	8.0
Pipeline	15.3
Intercontinental (million tons)	553.6
Air	1.6
Sea	552.0

Economic growth is the driving force behind increases in freight transportation. An increasingly larger portion of the Dutch economies dependent on the import and export of goods. The Dutch economy presently derives more of its income from the service sector than from the manufacturing sector, and this fact has a dampening effect on the growth of freight transportation. Moreover, the trend is to manufacture more expensive, higher quality products; consequently, financial turnover increases, but product volumes do not. Freight transportation and the aviation sector are

especially sensitive to economic fluctuations. Freight transportation could decrease by 2.5 percent to 3.5 percent in 2009, and by 0.3 percent in 2010. [Source: KiM, 2009, Mobiliteitsbalans 2009, Den Haag: Kennisinstituut voor Mobiliteitsbeleid]

2. Obstacles to the development of transport

Obviously, the economic crisis has also affected the development of transport in the Netherlands. From an economic point of view this means less business for the freight, forwarding and logistics sector, which forms an important economic pillar of the Dutch economy. On the other hand, it means also less traffic on the roads, less congestion and hence improved traffic flows, accessibility and robustness of the network (road, waterways, rail and air traffic).
Since the current administration has launched a major short-term investment programme for roads (national and regional), railways, regional public transport and waterways in 2008, the decrease in traffic volumes leave a little more room for all these projects to be carried out simultaneously without too much interruption for the daily traffic flows. The investment programme stems from the 'MobiliteitsAanpak' (Mobility Action Plan, 2008) and aims to widen the mobility choices for travellers and forwarders (goods) alike by strengthening the quality and capacity of each of the transport modes and improving the connections between them (inter modal transport) thus creating a more robust network which is ready to serve the public aims of the Netherlands in the future.

To ensure these and other infrastructure programs in the future can be implemented in a much shorter timeframe whilst paying respect to environmental concerns, spatial development etc. etc., new laws and guidelines have been adopted for infrastructure and spatial projects. This should enable to cut the whole project time from drawing board till realisation in half. A much more integrated approach (all modes, spatial development) and participation of interest groups at the early stage of the process are all part of this approach.

3. Good practices in the transport sector

On Safety:

- Tougher measures on use of children seats and seat belts in cars and coaches
- Implementation of an extra outside mirror for trucks (HGVs) to better notice vulnerable road users like pedestrians and cyclists when turning a corner ("dead corner" mirror)
- Testing of anti-accident systems and black box in trucks (HGVs): warning system sensitive for distance between vehicles, speed, unexpected movements etc. etc.
- Tightening of safety standards for HGVs (like tires, navigation)
- Implementation of ERTMS on new railway lines
- Stricter guidelines for working on/along railway lines, during night times, up to cessation of railway traffic
- Introduction of the 'mobiele werkplaats' on the railway lines: basically, a wagon shell with no bottom floor, thus offering a protected space for railway workers to work between the tracks (inside the car) without being hindered by passing trains on neighbouring tracks.
- Implementation of EU regulation on international transport security (maritime, aeronautical, road)
- Sector Agreement Schiphol ("Alders-tafel akkoord"): all interested parties relating to the future development of Schiphol airport participated at frequent round table meetings (chair mr Hans Alders) which led to a widely supported and accepted sector agreement on the sustainable development of Schiphol whilst at the same time reducing the noise, pollution and safety risks for nearby residents and companies.

On Efficiency:

- Sector Agreement Schiphol ("Alders-tafel akkoord"): all interested parties relating to the future development of Schiphol airport participated at frequent round table meetings (chair mr Hans Alders) which led to a widely supported and accepted sector agreement on the sustainable development of Schiphol whilst at the same time reducing the noise, pollution and safety risks for nearby residents and companies.
- Introduction of road pricing bill to Parliament. For details please see attached press release for bill Kilometre Charge.
- Wide set of measurements aimed at improving the efficiency of the nationwide road system under the umbrella of the 2008 Road Action Plan.
- Implementation/realization of 2008 Regional Public Transport Action Plan, worth 1 billion euros, including a wide set of measurements to improve travel times, capacity, tangential lines and comfort, in order to accommodate a growing number of public transport users.
- Implementation of ERTMS on new railway lines: Amsterdam – Utrecht, Betuweroute, HSL-Zuid
- Opening of High Speed Line Amsterdam – Rotterdam – (Breda) – Brussels – Paris (HSL-Zuid).
- 30 Urgent road projects which are vital for better traffic flow, improved safety, less congestion. These are relatively 'small' road projects like adding extra lanes, reconstruction of highway junctions etc. These projects have started in 2008 and 2009 en should yield results as from 2009.
- Subsidizing many initiatives and pilot projects focusing on mobility management, tele-commuting, flexible working hours, etc.
- Implementation of special 'bike highways' in the East and West of the country.

On Environmental performance:

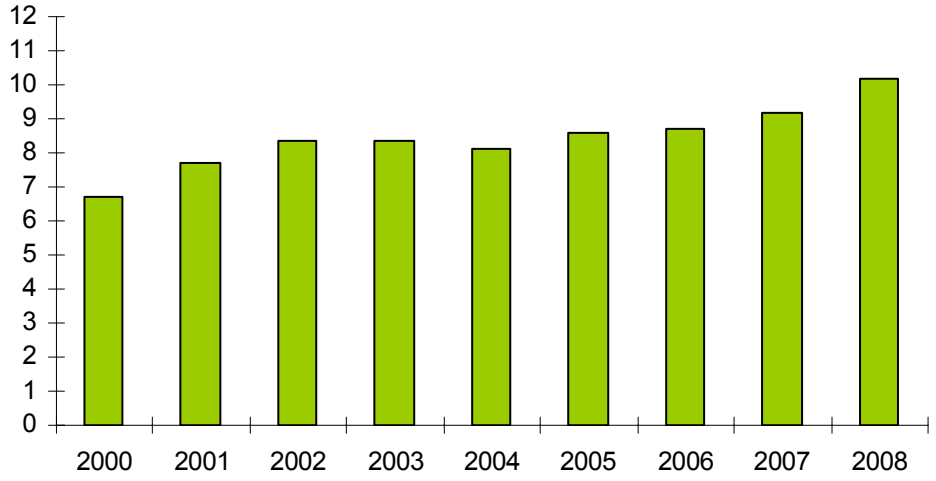
- Sectoral Agreement for Sustainable Mobility, Logistics and Infrastructure. Major Dutch companies active in the field of mobility and the Netherlands' national government have signed a covenant, or sectoral agreement, which stipulates the road ahead to achieve the national reduction target of 13-17 Mtons (1990 levels) CO2. The agreement finds its roots in the national strategy for reduction of energy use (Clean and Efficient Programme) and runs until 2020.
  Amongst others, participating organisations are ANWB (Netherlands motorists association) RAI Association, KNV (Royal Netherlands Transportation association), BOVAG, NS (Netherlands' Railways), Schiphol Group, KLM (Royal Dutch Airlines) and the Port of Rotterdam. From the national government's side, the Ministers for Transport and Environment, as well as the vice-Minister for Finance have inked the agreement.
- Stimulation of production and use alternative/bio-fuels
- Innovation-program: "This is the car of the future": government led program about the stimulation of sustainable car-development, including bio-fuels, hybrids and battery/electric cars. Amongst others, this has led to the installation of the Formula E-team: a sectoral wide program team that aims to facilitate market development and slash regulatory hurdles so that the Netherlands can become *the* pilot project for electrical cars.
- Sector Agreement Schiphol ("Alders-tafel akkoord"): all interested parties relating to the future development of Schiphol airport participated at frequent round table meetings (chair mr Hans Alders) which led to a widely supported and accepted sector agreement on the sustainable development of Schiphol whilst at the same time reducing the noise, pollution and safety risks for nearby residents and companies.
- A whole array of technical innovations to reduce noise levels at (rail)roads, like

innovative asphalt, tire pressure, honing and smoothing of flanges of trains.
- Sustainable purchasing of cars and other mobility needs etc by central government.
- Start of research project into the possibility of further efficiency improvements in the freight and logistics sector
- Changes to the fiscal regime for car users/owners and HGVs, so that it favours vehicles with relatively little environmental impact and punishes vehicles with a larger footprint.
- Subsidizing many initiatives and pilot projects focusing on mobility management.

4. Transport infrastructure investment

In 2008 the total sum of investment in infrastructure by all levels of government (central, provinces, municipalities and regional water authorities) amounted to approximately 10 billion euros. Of this 4 billion came directly from central government, which was almost entirely used for the building of new infrastructure (roads, railways, waterways, dikes). If maintenance costs are included, the central government figure is roughly doubled. In addition, central government provides annually 1 billion euros to lower governments for supporting regional public transport operations and local/regional infrastructure.

Between 2000 and 2008 the total sum of investment by all levels of government in roads, railways and waterways (excluding maintenance) has increased by almost 50% from nearly 7 billion to 10 billion euros. However, since also GDP has gone up, for many years the total share of transport infrastructure investment has remain largely constant at 1.7 percent of GDP.



2000	2001	2002	2003	2004	2005	2006	2007	2008
6,72	7,677	8,354	8,353	8,145	8,578	8,689	9,163	10,186

Figures in billion euros. These investments are excluding maintenance.

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DET KONGELIGE
SAMFERDSELSDEPARTEMENT

Ministry of Transport and Communications

TRANSPORT SITUATION IN NORWAY IN 2009

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Your ref	Our ref	Date
	09/144- GM	06.01.2010

Review of the transport situation in ECE countries and emerging development trends - Questionnaire

Dear Ms Éva Molnàr

With reference to your e-mail dated 14 October 2009 please find below a summary of the transport situation in Norway for 2009.

1. Traffic trends

Overall there seems to be a slight increase in road traffic in 2009. Traffic statistics from the end of October 2009 showed an increase of 0,6 % for light vehicles compared to the end of October 2008 and an increase of 0,7 % so far in 2009. Due to the financial crises there has been a decrease for heavy vehicles of 3,8 % since the end of October 2008 and 3,9 % so far in 2009. The increase in road traffic has been 0,1 % during the past year, from the end October 2008 to the end October 2009 and has increased by 0,2 % the first ten months of 2009.

The railway statistics are for the moment incomplete, but the overall trend is a slight reduction (about 3 %) in passenger traffic and a somewhat greater reduction in freight traffic.

2. Obstacles to the development of transport

An obstacle in 2009 has been high prices in the market for operations and maintenance. New forms of contracts are being developed and tested. The financial crises have had a cooling effect on prices within the construction sector.

3. Good practices in the transport sector

The budgets allocated to the road sector have increased over the recent years, as well

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as the amount of toll-financing by road taxes. In addition the government implemented a package of measures to prevent the negative impact of the financial crises during 2009. Safety measures, maintenance and investments have been prioritized. Overall this has led to higher mobility and better safety, environmental care and universal design.

Road Safety

In Norway the number of fatalities in road accidents so far in 2009 (Jan-Oct) has been reduced by nearly 20 % from 2008, which was a particular poor year as regards road safety performance. In 2009 the allowance to road safety measures was more than doubled compared to previous years. During 2009 Norway has intensified our general road safety work. We have had a special emphasis on speed related accidents, introducing a major campaign on speed and implementing automatic section control. To counteract the large number of accidents involving youth (18-24 years old) we have launched a dedicated action plan for reducing accidents among youth.

Award program

The Ministry of Transport and Communications has since 2004 had a reward program for the 9 largest city regions. Until 2008 the invited city regions could apply and be rewarded based on actual reductions in car use and/or an increase in public transport use compared with an average of previous five years.

From 2009 the Ministry also opened for the city regions to apply for a binding 4-year agreement with the Ministry within the framework of the award program. The objective of the 4-year agreement is to give the local authorities a more predictable economic incentive to impose new or stronger local measures to reduce private car use, such as restrictive parking policy, congestion charging and real improvements to public transport. Also, the Ministry believes the agreements will strengthen the incentives for the municipalities in the actual city regions to cooperate in establishing a common land use and transport policy for the region. So far the Ministry has entered into 4-year agreements with two city regions, The Kristiansand region and the Trondheim region.

4. Transport infrastructure investments

Norwegian kr

Year	GPD (including international shipping and oil operations)	Road infrastructure investment for roads owned by the state financed from appropriations [1)]	Toll financing of road infrastructure investment for roads owned by the state [1)]	Share of investments from in GDP
2006	2 159 600 000	6 211 100	3 875 000	0,47 %
2007	2 277 100 000	6 614 700	4 170 000	0,47 %
2008	2 548 300 000	6 816 100	5 400 000	0,48 %
2009	2 341 300 000	7 510 200	5 700 000	0,56 %

[1)] The table does not include investments in roads owned by counties and municipalities.

Investments in road infrastructure are financed within the budgets of its owner, weather it is owned by the state of Norway, the counties or the municipalities. In addition toll financing is used for several projects, always in agreement between local and national authorities.

The investment in railway infrastructure has risen from NOK 2.4 billion in 2008 to 3.2 billion in 2009. This compares to 0.09 %, resp. 0.14 % of GDP.

Yours sincerely,

John Arild Jenssen

for Grete Mathisrud

- - - - -

TRANSPORT SITUATION IN POLAND 2009

1. Traffic trends

The goods transport in 2009 noted a slight decrease. The general volume of goods transported from January to October fell by 4,9 % in comparison with the same period of the year 2008. For particular modes the results for the same period are: railways: - 14,5 %, road transport: + 2,7, inland waterway transport: + 6,8%.

The passenger transport experienced a harder fall. For the period from January to October 2009 total number of passengers by all modes of transport in Poland fell by 13,8% in comparison with the same period of 2008. For the railway transport there was a decrease of 2,9%, for road transport a decrease of 19,3 %.

Inland navigation is the only mode of transport which showed a significant growth in 2009. Due to favorable natural conditions on main inland waterways and lack of icing the navigation season was longer as in previous years.

Road traffic safety in Poland – basic indicators January – October 2009

	I- X'2008	I- X'2009	I-X'2008 = 100%	+ / -
Accidents	40 947	36 797	89,9	- 4 150
Killed	4 438	3 739	84,2	- 699
Injured	52 279	47 101	90,1	- 5 178

2. Obstacles to the development of transport

The main obstacle to higher growth of turnover for inland navigation is still the poor waterway conditions and its low navigability. There are often both low level of water and rising costs of using inland waterway transport infrastructure including locks.

But new prospects emerged for that mode of transport. Together the Ministry of Infrastructure and the National Waterway Management Authority (KZGW) initiated preliminary studies on long-term program of the modernization of inland waterway infrastructure. Those efforts are linked directly with the "Program for Odra River 2006" and National Reforms Program (KPR) for implementing the Lisbon Strategy for 2008-2011. A draft feasibility study together with a strategic assessment of environmental impact should be ready at the end of 2010.

3. Good practices in the transport sector

New financing scheme for road investments

New system of financing of national roads, with the exception of such roads in the large cities (cities of powiat (county) status), outlined in the *Law on amendment of the law on toll motorways and on National Road Fund and on amendments to some other laws* from 22nd May 2009, takes the burden of financing road investments largely from the state budget and puts it on the National Road Fund (KFD). Therefore there are two sources for financing road infrastructure in Poland: construction and development of infrastructure is financed by the KFD, renovation and maintenance works are financed from the state budget.

Accordingly with the premises of the Law of 22nd May General Directorate of National Roads and Motorways receives resources from the state budget for study and documentation works for the purpose of roads and motorways construction, real estate acquisitions and management, compensations, forest protection duties, consolidation and swap of real estate, archaeological and environmental works as well as for management and maintenance of road network

KFD finances construction and development of road infrastructure. Accordingly to the Law the yearly finance plan of the KFD is created with allotment by expenditure assortments according to the investment priorities such as motorways, continuing projects, "EU" projects and obligations related to international agreements. Financing values are assigned to the assortment groups and not to the particular investments,. They are aggregated on a quarterly basis which enables flexible expenditure accordingly with the current needs.

As the result of this new scheme no spending cuts occurred in the road investment program. KFD takes its resources from the EU funds, from the emission of bonds and from loans from IFIs. The current mechanism is planned to be used beyond the period of crisis.

Program of Abolishment of Dangerous Points on Roads (PADPR)

PADPR was introduced due to the high risk of accidents and the bad state of the safety infrastructure on the roads under the administration of local governments.

The aim of PADPR is to reduce the number of accidents, its casualties and number of collisions on the voivodship, powiat (county) urban and communal roads through the reconstruction of crossroads and the sections of roads with the highest occurrence of accidents. Program's aim is also to promote among local governments good practices in improving safety of road infrastructure and encouraging them to provide resources for the

sections which need urgent reconstruction.

Ministry of Infrastructure co-finances these investments through resources from the World Bank and the EIB loans by refunding some of the expenditures incurred by local governments.

Basic data concerning the program:

- **369** projects for infrastructure improvement on roads under the administration of local governments scheduled for **2005-2009**;
- Total value of planned projects**: over 410 mln zł.;**
- **Total value of planned refunds: 190 mln zł.**;
- **366** projects completed by **30.06.2009**;
- **Program is advanced in 95%;**
- Total investment accomplished: almost 387 mln zł.;
- Total refunding accomplished: 159 mln zł.

The analysis after one year from reconstruction on the sections completed in 2005 shows:

- **average decline of accidents by 66%,**
- **average decline in injuries by 68%,**
- **average decline of death casualties by 91%,**
- **average decline of collisions by 48%.**

Decrease of fatality ratio of road accidents by 2/3 – from 9 death casualties for 100 accidents to 3 death casualties for 100 accidents.

The special case in the Program is the project „Dutch Town", based on reconstruction of part of the road infrastructure in the city of Puławy to improve road safety. That project was co-financed by the Ministry of Economy of the Netherlands.

The aim of the Project was to reduce the number of accidents and their casualties by calming traffic in the area of housing quarter and the nearby main exit road with a high traffic density. The project has been designed on the basis of the best practice used for road infrastructure design in Netherlands:

- ensuring the safe way to school, work and public utilities;
- regulation of the traffic velocity.

It is planned to use solutions used in Puławy project for the series of training

sessions for the engineering staff of road management units and traffic management units and also for designers to change the mindset on designing roads in built-up areas and on calming traffic. Solutions from Puławy will be used to verify the regulations on calming traffic as well as national guidelines for this aim and in the book of best practice "The rules for traffic calming on roads by physical and technical means".

4. Transport infrastructure investment

In the budget of Ministry of Infrastructure for 2009 were expected the following assets (state on 30.11.2009)

1. ***on railways***
   - modernization, building and rebuilding of national railways: 450 561.0 thous. zł

2. ***on national roads***
   - investments in road infrastructure: 6 191 519.4 thous.zł

3. **sea ports**
   - investments in port infrastructure: 70.278.7 thous. zł

The total amount of assets concerning expenditure on infrastructure scheduled in State Bugdet 2009 is 6,7 billion zł. Road investments are financed mainly from the National Road Fund (KFD) and their value for 2009 is 18 billion zł. Together, value of all infrastructure investments in Poland in 2009 amounts to the 1,5 % of GDP.

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Schweizerische Eidgenossenschaft
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Département fédéral de l'environnement,
des transports, de l'énergie et de la communication DETEC

Office fédéral des transports OFT
Abteilung Politik

TRANSPORT SITUATION IN SWITZERLAND IN 2009

Référence du dossier: 012.521/2009-12-18/107
Votre référence:
Notre référence: rkm
Dossier traité par: Matthias Rinderknecht
Berne, le 29 décembre 2009

Review of the transport situation in UN-ECE countries and emerging development trends: 2008 – trend 2009

Rapport de présentation de la délégation suisse

1. Traffic trends / évolution des trafics et perspective

Trafic marchandises des Chemins de fer fédéraux (CFF) en général

Exercice 2008

En termes de produit du trafic, CFF Cargo a affiché une légère perte (1,8%) atteignant 1044,2 mio (2007:1062,6 mio CHF. Le déficit du résultat d'exploitation affichait une perte de 3,7 mio CHF (2007: 180 mio CHF).

Les prestations de transport étaient également en baisse de 6,3% (12'530,9 mio tkm net, 2007: 13'368,1 mio tkm net).Cela est essentiellement dû au trafic combiné (dont trafic combiné -15,3%, trafic combiné non-accompagné -16,3%, chaussée roulante -4,2%, trafic par wagons isolés +7%, trafic par wagons complets isolés +3%, trains complets en trafic par wagons isolés +16,1%).

Le BLS, deuxième entreprise ferroviaire de transport de Suisse, affiche une croissance de + 9,8%, à savoir 3697,1 mio tkm nettes (2007: 3368 mio tkm nettes).[1]

Trafic transalpin: rail et route

Exercice 2008 [2]

Dans le trafic transalpin (trafic intérieur, import, export, transit), le transport ferroviaire a affiché une légère croissance (25,5 mio t contre 25,3 mio t en 2007). La part du transport combiné (non accompagné et accompagné) a légèrement diminué (14,9 et 1,9 contre 15,1 mio t et 2,0 mio t en 2007).

Dans le transport ferroviaire transalpin, la proportion du transport par wagons isolés comparée au transport combiné a pu être améliorée. Sur l'ensemble des divers transports, l'axe du Loetschberg

[1] Rapport de gestion BLS 2008 (uniquement en allemand)

[2] voir alpinfo 2008, site internet http://www.bav.admin.ch/themen/verkehrspolitik/00501/index.html?lang=fr -> alpinfo 2008

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a pu maintenir le niveau de l'année précédente, tandis que sur l'axe du Gothard, le léger recul du transport combiné était perceptible.

Dans le transport routier transalpin, la période de croissance s'est poursuivie avec un léger plus aussi bien au niveau des tonnages qu'au niveau du nombre des véhicules (14,4 contre 14,2 mio t [NNt] en 2007 et 1,275 contre 1,263 mio véhicules).

Tendance 2009

L'effet de la crise financière et la conjoncture généralement à la baisse sont particulièrement sensibles durant le premier semestre 2009.

Le secteur ferroviaire a davantage souffert de la crise et affiche après 6 mois un recul de -24,2% dans le trafic transalpin, tandis que le secteur routier a diminué de 14,1%, le nombre de véhicules ayant quant à lui baissé de 13,1% [3].

Trafic voyageurs

Au cours de l'année 2008, le nombre de voyageurs transportés dans le cadre du réseau CFF a augmenté de 5,2 % (322,6 contre 306,7 mio voyageurs en 2007) tandis que les voyageurs-kilomètres ont vu une progression de 6,7% (16144,3 contre 15´134 mio vkm en 2007). [4]

Cette tendance positive dans le domaine du trafic voyageur est, en règle générale, également valable pour les nombreuses entreprises de transports concessionnaires exerçant leur activité essentiellement dans le trafic régional aussi bien dans le transport ferroviaire que routier.

2. Instruments régulateurs en matière de politique de transports

Redevance sur le trafic des poids lourds liée aux prestations (RPLP)

Les informations de base relative à l'introduction de la RPLP, son fonctionnement et les modalités techniques ont été fournies dans les rapports antérieurs.

Les effets de l'introduction de la RPLP parallèlement à l'augmentation du poids maximal autorisé – à savoir l'augmentation de l'efficacité du transport routier et un certain effet de transfert modal – se sont poursuivis. En 2008, les taux de la RPLP et le groupement des classes d'émissions ont été adaptés conformément à l'accord entre l'UE et la Suisse sur les transports terrestres, les informations détaillées à ce sujet sont intégrées au paragraphe suivant.

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[3] Voir « Monitoring Flankierende Massnahmen 1. Semesterbericht 2009 : http://www.bav.admin.ch/verlagerung/01529/index.html?lang=fr&download=M3wBUQCu/8ulmKDu36We-nojQ1NTTjaXZnqWfVp7Yhmfhnapmmc7Zi6rZnqCkkIN3gHZ+bKbXrZ2lhtTN34al3p6YrY7P1oah162apo3X1cjYh2+hoJVn6w==&.pdf; et Rapport sur le transfert : http://www.newsservice.admin.ch/NSBSubscriber/message/fr/attachments/30362/62645/17512/VB_09_fr.pdf

[4] Rapport de gestion CFF 2008

Accord entre l'UE et la Suisse sur les transports terrestres

Les informations de base relative à la conclusion et le contenu de l'accord signé le 21 juin 1999 et entré en vigueur le 1er juin 2002 ont été donnés dans les rapports antérieurs.

L'élément central de l'accord est constitué par les modalités de l'augmentation progressive du poids maximal des véhicules en parallèle avec une augmentation des redevances routières. Les modalités concernant les différentes classes d'émission et leurs taux de redevances pour la période 2005 à 2007 ont été fixées dans le cadre du comité mixte dénommé « Comité des transports terrestres Communauté / Suisse ».

Sur la base d'une moyenne pondérée de 325 CHF fixée dans l'ATT, les trois catégories tarifaires suivantes sont valables à partir du 1er janvier 2008:

- 369 CHF pour un trajet de 300 km avec un camion de 40 t effectué par des véhicules EURO 0, 1 et 2, soit un taux de 3,07 centimes par tonne et km,
- 320 CHF pour un trajet de 300 km avec un camion de 40 t effectué par des véhicules répondant à la norme EURO 3, soit un taux de 2,66 centimes par tonne et km *,
- 272 CHF pour un trajet de 300 km avec un camion de 40 t effectué par des véhicules EURO 4, 5 et 6, soit un taux de 2,26 centimes par tonne et km.

** Le 12 septembre 2007, le Conseil fédéral a approuvé les modifications de l'ordonnance relative à la RPLP sur la base de ces taux. Il a cependant décidé que les véhicules EURO 3 ne payeront en 2008 que 2,26 centimes et qu'ils ne seront transférés dans la catégorie de tarif moyen qu'à partir du 1er janvier 2009.*

Cette dernière augmentation des tarifs de la RPLP a été contestée par quelque 5000 transporteurs routiers qui ont fait recours auprès du Tribunal administratif fédéral, invoquant une sur-couverture des coûts routiers par le trafic de poids lourds. Le 21 octobre 2009, le Tribunal administratif fédéral a rendu son arrêt en admettant les recours.

Les Départements fédéraux concernés (DFF et DETEC) ont fait recours contre cet arrêt auprès de la plus haute instance judiciaire, le Tribunal fédéral (TF).

Indépendamment de l'issue de ce recours, les tarifs RPLP ont été abaissés dès le 4 novembre 2009 au niveau de 2007. Au cas où le TF devait donner raison aux transporteurs, ceux-ci pourraient demander un remboursement de la RPLP payée en trop depuis le 1er janvier 2008.

3. Développement des grandes infrastructures de transport

Réalisation et financement de l'infrastructure des transports publics (FTP)

Les détails des projets dans le cadre de la réalisation et du financement de l'infrastructure des transports publics, à savoir les nouvelles liaisons ferroviaires à travers les Alpes (NLFA = les tunnels de base du St-Gothard, du Monte Ceneri et du Loetschberg), l'achèvement de Rail 2000, les raccordements de la Suisse occidentale et orientale au réseau ferroviaire européen à grande vitesse et la lutte contre le bruit du rail ont été évoqués dans les rapports antérieurs (investissement total : 30,5 milliards de francs, répartis sur les 20 prochaines années).

La réalisation des nouveaux tunnels de base a commencé courant 2000.

Depuis le 9 décembre 2007 le nouveau tunnel de base du Loetschberg est en service régulier. Avec une longueur de 34 km, un équipement de signalisation et de sécurité au poste de conduite par ETCS niveau II, permettant ainsi des vitesses de plus de 200 km/h.

Etat d'avancement des travaux au Saint-Gothard et au Ceneri

Au 1er décembre 2009, 141,3 km – soit 93% - de la totalité des 152 kilomètres de tubes de tunnel, puits et galeries du tunnel de base du Saint-Gothard étaient excavés.[5] L'ouverture du tunnel est prévue pour 2017.

Au tunnel d'accès du Ceneri au sud du tunnel de base, 7,5 km ou 18,8% de l'ensemble du système (40,19 km) (tunnels et galeries) sont excavés. L'ouverture du tunnel est prévue pour 2019.

4. Dépenses globales en matière de transport (budget 2009)

Les montants ci-dessous comprennent aussi bien les investissements dans les infrastructures que les contributions aux frais d'exploitation (entre autres environ 773 mio CHF pour l'indemnisation du trafic régional dans le domaine du transport public !)

Total: 7833 millions CHF (budget 2008 corrigé: 7603 millions CHF)

Part du budget global de la Confédération: 13,4% des dépenses de la Confédération (variation 0)
Part du PIB[6] : 1,45% (nominal) du PIB (1,48% en 2008)

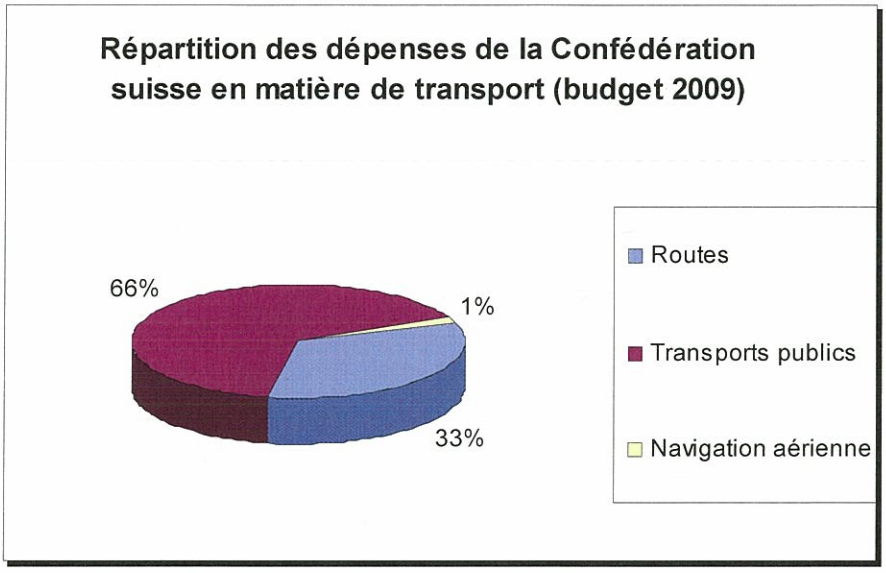
[PIB 2008: 541,827 milliards CHF, 2007 corrigé: 521,068 milliards CHF]

Sur la base des données du budget 2008, la répartition des dépenses par mode de transport est la suivante (variation par rapport au budget de l'année précédente)[7]:

[5] voir site *alptransit* Gothard : http://www.alptransit.ch/fr/letat-davancement-des-travaux/saint-gothard/
[6] PIB: calcul approche par la production, voir site http://www.bfs.admin.ch/bfs/portal/fr/index/themen/04/02/01/key/bip_gemaess_produktionsansatz.html
[7] Message concernant le budget 2009 / Botschaft zum Voranschlag 2009, Berne 2009

Référence du dossier: 012.521/2009-12-18/107

Dépenses en faveur du transport public: 5115 mio CHF (2008 : 4881)
Dépenses en faveur du transport routier: 2612 mio CHF (2008 : 2616)
Dépenses en faveur du secteur de l'aviation : 105 mio CHF (2008 corr. : 105)



Investissement total pour les grands projets d'infrastructures ferroviaires:

30,5 milliards CHF répartis sur 20 ans, soit en moyenne 1,5 milliards CHF/ année
Investissements grands projets d'infrastructures ferroviaires en % du PIB: 0,27% du PIB (état 2008)

Office fédéral des transports
Section Affaires internationales

Jean-Claude Schneuwly, Chef de section

Copie : dg,gv,ia

TRANSPORT SITUATION IN TURKEY 2009

1. TRAFFIC TRENDS

MARITIME

FIGURES DISPLAYING THE CARGO HANDLING REALIZED AT TURKISH PORTS BETWEEN THE YEARS OF 2007-2009)

TON

YEARS	LOADING					DISCHARGING					Transit	Grand Total
	Cabotage	EXPORT			Loading Total	Cabotage	IMPORT			Discharging Total		
		Turkish Flag	Foreign Flag	EXPORT TOTAL			Turkish Flag	Foreign Flag	IMPORT TOTAL			
2007	17.723.114	9.804.237	58.856.033	68.660.270	**86.383.384**	18.005.809	27.187.904	126.211.445	153.399.349	**171.405.158**	28.486.106	**286.274.648**
2008	18.922.398	10.654.742	62.590.230	73.244.972	**92.167.370**	20.134.058	21.136.641	130.397.079	151.533.720	**171.667.778**	50.744.950	**314.580.098**
2009*	13.865.072	7.306.952	46.134.939	53.441.891	**111.591.206**	14.911.381	14.817.204	87.347.373	102.164.577	**117.280.481**	44.488.766	**228.871.687**

* The statistics between 01.01.2009 and 30.09.2009

Source : Undersecretariat for Maritime Affairs

The prospects for the forthcoming years,

- 401 million tons of cargo in 2010
- 510 million tons of cargo in 2012

CARGO FLOW FORECASTS AT TURKISH PORTS 2008-2023

Years	Cargo Type			
	Container (TEU)	General & Bulk Cargo (Ton)	Liquid Chemical Cargo (Ton)	Vehicles (Pieces)
2008	4.769.468	126.190.466	8.534.150	1.959.179
2009	5.246.325	134.378.180	9.014.851	2.178.633
2010	5.747.025	143.105.606	9.522.493	2.409.058
2011	6.272.760	152.401.936	10.058.626	2.651.006
2012	6.824.782	162.304.891	10.624.892	2.905.050
2013	7.404.405	172.875.830	11.223.031	3.171.797
2014	8.013.009	184.229.964	11.854.885	3.451.882
2015	8.652.043	196.546.020	12.522.407	3.745.970
2016	9.323.029	209.663.762	13.227.666	4.054.763
2017	10.027.524	223.636.284	13.972.854	4.378.995
2018	10.767.326	238.520.250	14.760.293	4.719.439
2019	11.544.076	254.376.128	15.592.446	5.076.906
2020	12.359.663	271.268.454	16.471.923	5.452.245
2021	13.216.030	289.266.106	17.401.489	5.846.352
2022	14.115.215	308.442.600	18.384.077	6.260.164
2023	15.059.360	328.876.405	19.422.796	6.694.667

Source: Türklim (2007)

Capacity Forecasts at Turkish ports (2015)

Cargo type	Capacity
Container (TEU)	14.237.000
General & Dry bulk Cargo (Ton)	185.000.000
Liquid chemical Cargo (Ton)	21.200.000
Vehicles (Pieces)	2.930.000

Source: Türklim (2007)

The most important mode in import is sea transport. Its market share in 2004 is 94.1% and in 2020 (Reference scenario) slightly less with 93.8%. The market share of road increases from 3.2% to 3.7% and of rail from 1.1 to 1.2%.

RAILWAYS

The shares of transport modes in Turkey fluctuate in a narrow band and can be considered stable since 2004 because of the fact that the ongoing share increase of roads has stopped. This outcome particularly results from investments made in railways and the development of passengers transport at airways. The share of railways in freight transportation was approximately 5% while the share of railways in passenger transportation was 2%. Moreover, this figure is likely to change in favor of railways for the next years, especially in passenger transportation at first, due to high speed train operation between Ankara and Eskisehir. Additionally there are other high speed lines under construction between major metropolitan cities of Turkey.

Investments particularly given to railways have kept up with its speed for 7 years. Within this framework, the Transport Master Plan Strategy has been elaborated and the opinion was reached that the railway portion at the freight transportation would be 15% and the railway portion at the passenger transportation would be 10% in 2020.

CIVIL AVIATION

Turkey is among the fastest developing markets in civil aviation on the world and it is expected that the increase in air transport continues in the coming years. By the end of October 2009, the total aircraft traffic was 897,926. 345,600 of this total traffic belong to the domestic flights, 321,718 to the international flights and 230,608 to the transit flights. This data is estimated to surpass the total aircraft traffic of 2008 by the end of this year.

The number of passengers carried by the end of October 2009 was 73,495,936 and this number reached to 73,985,203 with the inclusion of the number of transit passengers. 33,995,065 of these passengers carried in the domestic lines and 39,500,874 of these passengers carried in the international lines.

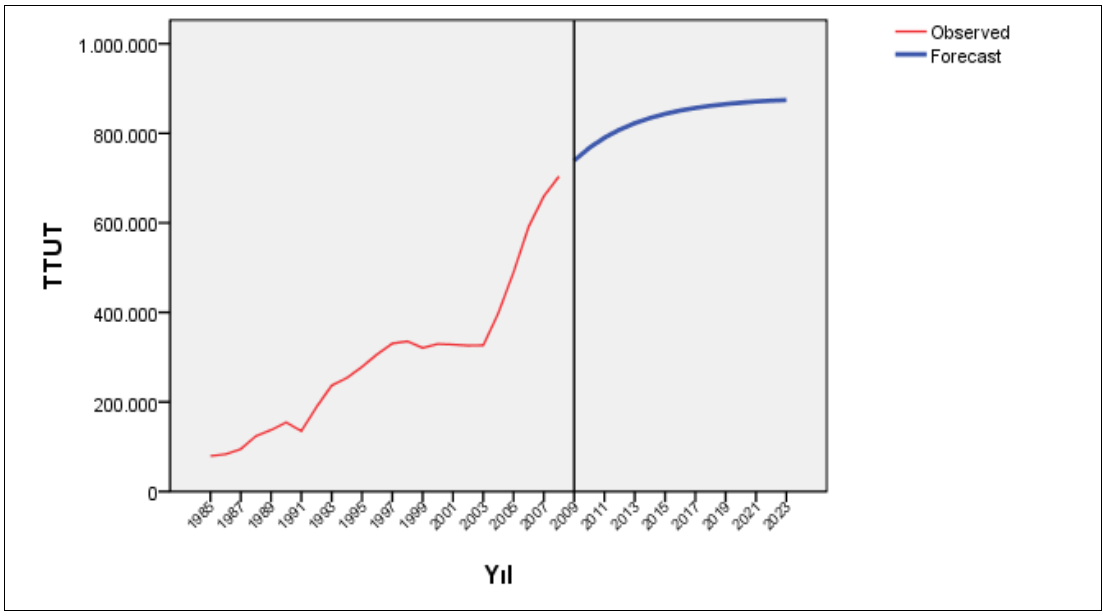
The cargo traffic for the same term was 1,534,619 tons. 363,126 tons of cargo carried in the domestic lines and 1,095,091 tons of it carried in the international lines. Despite the small decline in comparison to the cargo carried in 2008, at the end of 2009 the total cargo traffic is estimated to catch the number in 2008 or to exceed it.

If the data of first 10 months of 2008 is compared with 2009, the total aircraft traffic has increased % 4 in the first 10 months of 2009. The domestic aircraft traffic has increased %5.6 and the international traffic has increased 2.4% (2.8% if we include the transit passengers). The total cargo carried has decreased 0.7% due to the decline in international cargo carried by air.

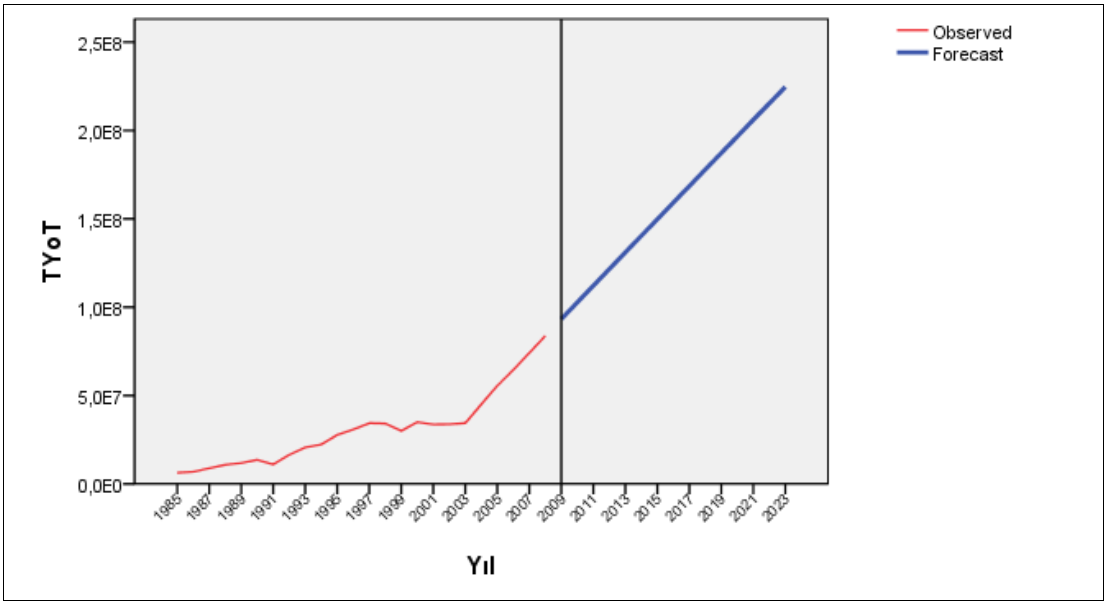
Thanks to the intensive work of the sector and the Ministry of Transport, the projections of recovery from the economic crises in the second half of the 2010 show that the passenger, cargo and aircraft traffic are forecasted to continue to increase in the next couple of years.

The following tables and charts represent future projections of civil aviation in Turkey.

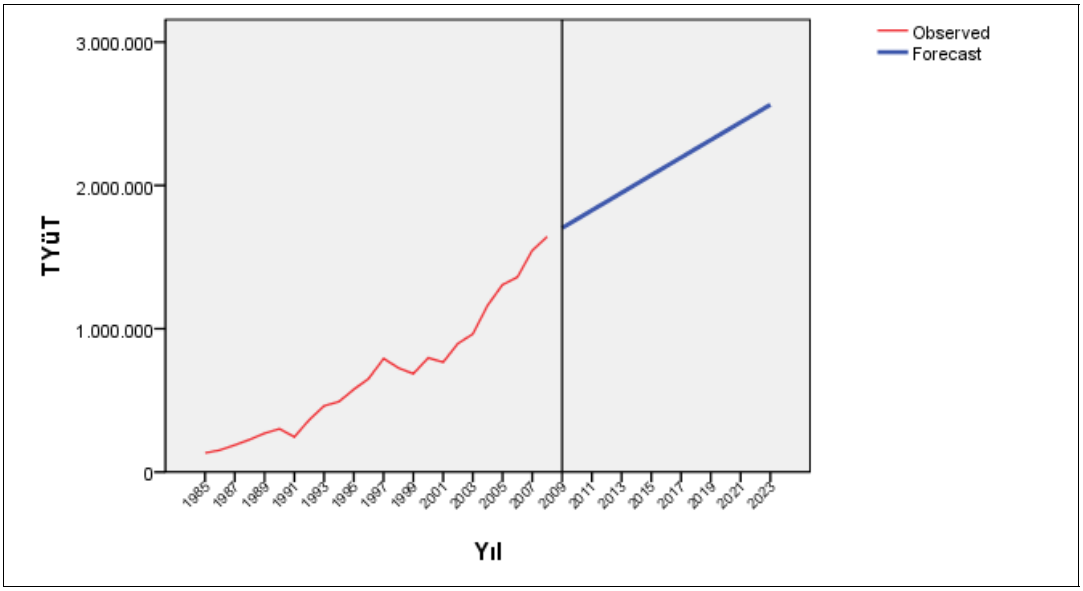
Projected Total Aviation Transport



Projected Total Passenger Transport



Projected Total Cargo Transport



Estimated Total Commercial Airplane Traffic

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Expected	739176	767458	790082	808178	822654	834234	843496	850906	856832	861573	865366	868399	870826	872767	874320
Optimistic	795833	884116	970957	1054513	1134008	1209218	1280199	1347152	1410348	1470080	1526646	1580328	1631392	1680079	1726609
Pessimistic	682520	650801	609206	561844	511300	459249	406794	354659	303317	253066	204085	156470	110260	65455	22030

Estimated Total Passengers (Millions)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Expected	93	102	112	121	131	140	149	160	168	178	187	196	206	215	225
Optimistic	100	100	100	200	200	200	200	200	200	300	300	300	300	400	400
Pessimistic	90	90	90	90	90	90	90	90	90	90	80	80	80	70	70

Estimated Total Freight (Tons)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Expected	1703520	1764960	1826401	1887842	1949282	2010723	2072164	2133604	2195045	2256485	2317926	2379367	2440807	2502248	2563689
Optimistic	1853808	1977435	2086603	2188282	2285175	2378668	2469584	2558461	2645670	2731484	2816107	2899698	2982384	3064268	3145434
Pessimistic	1553232	1552486	1566200	1587402	1613390	1642778	1674743	1708747	1744419	1781487	1819745	1859035	1899230	1940228	1981944

You can also find below short term expectations of total traffic the Airports that under the authority of General Directorate of State Airports Authority of Turkey (DHMİ):

DHMİ	**Movements***				
YEARS	2008	2009	2010	2011	2012
(Landings+Take-Offs)	688.189	713.188	761.517	806.770	847.606

* Figures represents the Airports that under the authority of the DHMİ.

DHMİ	**Passengers (Arrivals+Departures)***				
YEARS	2008	2009	2010	2011	2012
Total Passengers	74.968.329	78.207.286	88.566.325	96.748.114	103.872.345

* Figures represents the Airports that under the authority of the DHMİ.

ROAD TRANSPORT

Road transportation has the predominant share of transportation modes in Turkey. About 83 percent of freight and 90 percent of passenger traffic are carried by roads. It is aimed to decline the share of highway transportation as one of the transportation policies. The ratio of freight traffic volume on highways is estimated as 68% and the ratio of passenger traffic volume on highways is estimated as 76% in 2023.

Traffic volume of state roads in 2009 has not been completely evaluated yet but initial studies show that traffic volume is likely to increase approximately 2 or 3% compared to 2008 traffic volume.

2. OBSTACLES TO THE DEVELOPMENT OF TRANSPORT

MARITIME

Efficient nodal points are essential in transport systems; however there still appears to be a weakness in many ports, at least partly due to issues of ownership status (public and private shared ownership of some ports). In recent years, it became clear that public ports could not accommodate the increasing demand owing to their current infrastructural capacities. Container traffic in particular, has achieved a very high growth rate. Public ports are thus undergoing a fundamental change in status, at a time when growing demand for service is creating pressure.

The weakness of nodal points is also revealed by the slow development of logistic centres and inland terminals; this is explained by the absence of adopted regulations concerning the implementation of land use policy, and by the weaknesses of intermodal and logistic actors.

Turkey is trying to ensure the reduction of delays related to non-physical barriers in order to accelerate the actual cargo flow with an aim to realize "safe, seamless and timely transportation" with the measures taken such as the following:

- Simplification of customs and administrative procedures

- Electronic transfer of customs and other administrative data through one-stop administrative procedure. With a view to provide reduced and standardized procedures, Government of Turkey launched necessary steps to accede to FAL Convention and national procedures have been initiated to ratify this Convention.

- Acceleration of privatization process.

RAILWAYS

General obstructive factors in developing railway transportation on the existing lines are extensive single line operation, insufficient infrastructure and performance, tight curves, high gradients, lack of automatic electronic signalling systems on major line sections, insufficient number of staff and financial problems.

As for freight transportation, low operational speed, lack of sufficient traction power for long hauling, higher operational costs are the main confining factors of railways in competing with other modes.

CIVIL AVIATION

As above given numbers show that the civil aviation sector of Turkey has not been effected negatively by the global crises that has taken its toll in many other sectors as well as in civil aviation in different countries. But in general, to enable the sector to realize its potential some measures (explained in the third section) have been taken by Turkish Directorate General of Civil Aviation (DGCA) since 2002.

However, launching transport operations based on intermodal approach would be the main need for the airports usage and national transport in the future. Many projects have taken into account in order to solve this problem.

ROAD TRANSPORT

Basic information about main problems that have hindered the development of road transport operations in Turkey:

i. Lack of Permits
ii. Difficulty in obtaining Professional Driver Visa
iii. High Passage Fees
iv. Border crossing problems
v. Traffic Congestion

Measures taken to alleviate these problems

Turkey attributes a special importance to remove obstacles in transit transport and discrimination applications in international road haulage. As a result, Turkey has signed bilateral road transport accords with 22 countries and the bilateral and/or transit international road haulage is liberalized. For this purpose, Turkey deploys great efforts both in international platforms as well as through bilateral meetings.

Turkey also made necessary interventions in the meetings of United Nations Economic Commission for Europe, The Inland Transport Committee and The Working Party on Road Transport, regarding the full implementation of the Article V of the GATT Agreement (General Agreement on Tariffs and Trade), which provides the liberalization of transit transport. As a result, The Inland Transport Committee recommended the contracting parties to implement the 5th provision of the agreement. Turkey also tries to make progress in the Black Sea Region (BSEC) for a more liberal market.

The work on actual facilitation of road transport of goods is going on under a special Memorandum of Understanding on Facilitation of Road Transport of Goods in the BSEC Region (signed in Kyiv in 2002 and entered into force on 20 July 2006). One of the objectives of this MoU is to provide a gradual liberalization in the road transport sector. In the framework of this target, Turkey endeavours that the sector will be liberalized gradually in this region.

In this framework, at its 4th meeting in Istanbul on 9 September 2009, the Steering Committee endorsed the decision of seven Member States namely Albania, Armenia, Georgia, Moldova, Romania, Serbia and Turkey to participate in a Pilot Project of the BSEC Permit. These 7 countries decided to implement a BSEC permit among them for a transit transport. The BSEC Permit will be used for a single round trip only and the empty or loaded trucks holding such a BSEC Permit will be allowed during this single round trip to transit through the territories of all Participating Member States without having to present any other bilateral transit permit.

3. GOOD PRACTICES IN THE TRANSPORT SECTOR

MARITIME

It is considered that the following measures have contributed to the improvement of transport sector in our country:

- Containerization and building container ports

- The process developed in the present Intermodal Line (Pendik/Ambarlı/Çeşme -Trieste) and implemented currently is Short Sea Shipping plus Combined Transport. Not only it is carried out in a pure intermodal environment but also it encompasses various logistical techniques and tools which make it unique on its own.

- The Short Sea Promotion Centre (SPC) in Turkey was established in 2008 by the Union of Chambers and Commodity Exchanges of Turkey (TOBB) and its secretarial duties have been undertaken by the Turkish Chamber of Shipping (IMEAK DTO). The aim of

the short sea promotion centre is to develop the short sea maritime shipping which is an environment friendly and economical way of transportation in Turkey and to facilitate its contribution to the Turkish Shipping Economy. The information centre has already started publishing information on the following address: www.shortsea.org.tr

- Establishment of a new Ro-Ro Link between Mersin-Trieste and improvement of Marport-Alexandria link under EUROMED MEDA MoS Project.

- Through the experiences and information obtained by the establishment of Turkish Straits VTS and its effective and efficient operations, it has been estimated as a necessity that some more VTSs should be established in İzmir, İzmit, İskenderun and Mersin Bays where the maritime traffic density is so high, risky and also dangerous cargo operations and passenger transportation are carried out.

RAILWAYS

Considering the importance of having an efficient transport network, Turkish government has taken several measures and undertaken investments to modernize and rehabilitate the railway infrastructure.

Establishing balance between transport modes, developing modes as complementary to each other and strengthening combined transport system in compliance with international legislations are major priorities set in Transport Main Plan Strategy of Turkey.

National and international block train operations have been operated and within this context, the block freight trains between Turkey-Europe, Turkey-Middle East and Turkey-Central Asia have been running reciprocally. There are also some developments in container transportation.

In order to increase the share of railway transportation, logistic centers are planned to be established in the points that have high potentials or access to roads, railroads or seaports. Furthermore, Ro-La transportation has been realized between Turkey-Austria since 2006 with the cooperation of private sector, after the agreements were approved among the countries on the route.

In addition to constructing high speed lines between major metropolitan cities, upgrading the existing lines by installing signaling systems and electrification systems, track doubling and also renewal of tracks, Turkish State Railways (TCDD) aims at increasing operational speed, comfort as well as line capacity of existing lines.

Master Plan Studies are also being carried out in the context of 2009 investment programme.

CIVIL AVIATION

Turkey's civil aviation sector has seen substantial benefits from adaptation of some liberal policies such as opening up the domestic market to the private sector.

Economic Airport Project

DGCA actualized the Economic Airport Project in 2007, which was intended to provide low-cost airports to airlines so that air transportation develops in our country.

With this project; passenger services at domestic and international lines as well as landing, parking and lighting are not charged at some airports. Besides, DHMİ has made minimum 10% and maximum 80% discounts for various airport service charges at other airports, following the changes on Fare Tariff.

Project of Green Airport

DGCA initiated necessary works to systematically decrease the existing or future damages of airport establishments on the environment and human health.

Under the leadership of DGCA, a project called "Green Airport" is contemplated; provided that the airline operators and service providers at the airports comply with the certain requirements, those airports will be called "Green Airport". DGCA shall provide the organizations and establishment that comply with the relevant requirements with a reduction in Service Tariff in order to grant them incentives and reward their sensibility.

Besides, as a result of intensive studies for the last three years that are also followed up by the DGCA, the works performed by the DHMİ were put into practice with regard to ambient noise. Within this context, it has been stated that noise rating, noise mapping, action plans and relevant precautions will be performed by the DHMİ.

Ground Handling Development Project

A significant increase in the number of airports that provide ground handling services occurred in parallel to putting idle airports into service within the scope of "Project of Regional Air Transport" of the Ministry of Transportation and Communications and increase in aircraft traffic. 17 more airports started to provide ground handling services for the last one year, thus the number of airports that provide ground handling services increased to 33.

ROAD TRANSPORT

As environmental assessment report, project identification sheet, recycling and restoring measures for the nature, environmental management plans are prepared, public works natural and noise reduction works are being conducted.

Development of Border Gate Infrastructure

To provide adequate infrastructure in order to remove the physical barrier at border crossing points, appropriate infrastructure should be available at the border points including offices for the inspection and control agents, laboratories, warehouses, road approaches to the border, border gates, vehicle parking areas, reliable electricity and power sources, reliable telecommunications services, scanners, etc. Such modernization projects at border gates have been realized through the Public-Private Partnership (PPP) financing package as is the case at some of the main border gates in Turkey.

Phasing out of old vehicles

Turkish fleet operating in international transport consists of high standard vehicles under Euro norms, however; the fleet in domestic transport market, especially in freight transport, does not conform to the same standards. As a solution to this fact, a project has been developed and motor-vehicles whose model year is 1979 and older in both freight and passenger transport will be gradually withdrawn from the market within 2 years. Through this project, 160.000 trucks and buses are expected to be withdrawn from the domestic market.

Vehicle Inspection

The tender for Vehicle Technical Inspection Stations has been finalized and an international tripartite consortium has been authorized to build and operate Vehicle Technical Inspection Stations and so to realize technical inspections and road worthiness tests, for 20 years. In this context, totally, 189 fixed and 76 mobile stations are set up which are distributed according to vehicle number registered and geographical conditions of the provinces of Turkey. As of 2009, inspections are being carried out in line with the EU requirements.

4. TRANSPORT INFRASTRUCTURE INVESTMENT

CIVIL AVIATION

At the passenger terminals of airports, the Built-Operate-Transfer (BOT) Model is successfully implemented in Turkey. The main goal of the BOT model is to ensure finance of high-tech projects that require huge resources by private sector instead of public sector.

ROAD TRANSPORT

The percentage share of highway investments in GDP in 2009 is 1,6% excluding expropriation. Under the supportive effort of the transport investments, PPP applications are being motivated in the road sector.

Finally, 38% of the investment budget of Turkish Ministry of Transport and Communications has been invested in the road transport sector and 39% of it has been used in railway transport sector.

RAILWAYS

The investment amount allocated to railways was about 1.000 Million $. The ratio of investment amount of TCDD to GDP is about 1.5 ‰ in 2008.

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