



EUROPEAN CONFERENCE OF MINISTERS OF TRANSPORT



TRENDS
IN THE
TRANSPORT SECTOR

1970-2003

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Trends in the Transport Sector

1970-2003

EUROPEAN CONFERENCE OF MINISTERS OF TRANSPORT (ECMT)

The European Conference of Ministers of Transport (ECMT) is an inter-governmental organisation established by a Protocol signed in Brussels on 17 October 1953. It comprises the Ministers of Transport of 43 full Member countries: Albania, Armenia, Austria, Azerbaijan, Belarus, Belgium, Bosnia-Herzegovina, Bulgaria, Croatia, the Czech Republic, Denmark, Estonia, Finland, France, FRY Macedonia, Georgia, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia and Montenegro, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine and the United Kingdom. There are seven Associate member countries (Australia, Canada, Japan, Korea, Mexico, New Zealand and the United States) and one Observer country (Morocco).

The ECMT is a forum in which Ministers responsible for transport, and more specifically the inland transport sector, can co-operate on policy. Within this forum, Ministers can openly discuss current problems and agree upon joint approaches aimed at improving the utilization and at ensuring the rational development of European transport systems of international importance.

At present, ECMT has a dual role. On one hand it helps to create an integrated transport system throughout the enlarged Europe that is economically efficient and meets environmental and safety standards. In order to achieve this, it is important for ECMT to help build a bridge between the European Union and the rest of the European continent at a political level.

On the other hand, ECMT's mission is also to develop reflections on long-term trends in the transport sector and to study the implications for the sector of increased globalisation. The activities in this regard have recently been reinforced by the setting up of a New Joint OECD/ECMT Transport Research Centre.

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INTRODUCTION

The main aim of this publication is to describe developments in the transport sector in Europe in 2003 and to show, primarily by means of charts, how the situation has changed since 1970.

The analysis of recent trends in the European transport sector is based on data supplied by 43 ECMT Member countries¹ in the form of statistics expressed in passenger and tonne-kilometres. To ensure that the overall trends are representative of as many countries as possible, the indices used in several of the charts include estimates for countries which do not yet have figures available for 2003.

The report has been divided in four parts. The first one is a brief analysis of the economic environment in 2003. The second part deals with freight transport in ECMT Member countries. The third part concentrates on passenger transport and the fourth one reviews road safety. The 15 Member States of the EU in 2003, together with Norway, Switzerland, Turkey, Iceland, Liechtenstein and Malta, are referred to hereinafter as “Western European countries” (ECMT/WEST). The

1. Albania (ALB), Armenia (ARM), Austria (AUT), Azerbaijan (AZE), Belarus (BLR), Belgium (BEL), Bosnia-Herzegovina (BIH), Bulgaria (BGR), Croatia (HRV), the Czech Republic (CZE), Denmark (DNK), Estonia (EST), Finland (FIN), France (FRA), FYR Macedonia (MKD), Georgia (GEO), Germany (DEU), Greece (GRC), Hungary (HUN), Iceland (ISL), Ireland (IRL), Italy (ITA), Latvia (LVA), Liechtenstein (LIE), Lithuania (LTU), Luxembourg (LUX), Malta (MLT), Moldova (MDA), Netherlands (NLD), Norway (NOR), Poland (POL), Portugal (PRT), Romania (ROM), the Russian Federation (RUS), Serbia and Montenegro (YUG in 2002), the Slovak Republic (SVK), Slovenia (SVN), Spain (ESP), Sweden (SWE), Switzerland (CHE), Turkey (TUR), Ukraine (UKR) and the United Kingdom (GBR).

recent trends in the transition countries are also reviewed. Given that the transport systems of these countries are highly distinctive and are currently undergoing radical change, it was decided to compile specific aggregate indicators: one set for the 12 Central and Eastern European Countries and three Baltic States (ECMT/CEECs) and a second set for the seven members of the Commonwealth of Independent States (ECMT/CIS).

Data for the former Czechoslovakia (CSK) have been taken into account up to 1992 to ensure a degree of continuity in the series over a lengthy period of time; from 1993 onwards, the data provided by the Czech and Slovak Republics have been used. Furthermore, German reunification produced a break in the series due to the incorporation, from 1991 onwards, of data relating to new *Länder*, resulting in a similar increase in the results of the ECMT as a whole.

1. THE ECONOMIC ENVIRONMENT IN 2003

1.1. General outlook

After the uncertainty created by the war in Iraq and the SARS epidemic in Asia, recovery began to take hold in the United States and Japan in mid-2003. Along with renewed faith in brighter economic prospects came a surge in demand for raw materials, whose prices -- and oil prices in particular -- peaked to record levels. On international financial markets, favourable trends, sustained by announcements of rising corporate profit margins, brought investors back to the equity market, facilitating corporate financing. The effects of expansionist policies pursued by the United States and a number of other developed economies, including Japan, combined with the dynamism of Asian countries such as China, made the recovery more vigorous. Amidst this positive overall picture in terms of growth, the lagging performance of euro-area countries stood out clearly, with the area showing one of the weakest, if not *the* weakest growth rate of all the advanced economies. In contrast, growth gathered pace in Eastern Europe, driven by strong domestic demand. A dynamic export trend and easier credit terms fostered that growth. In the CIS, especially strong raw materials markets exerted a highly beneficial influence on the growth rates of those economies. In all, 2003 was a year of economic recovery -- except in the euro area, which was still affected by the weakness of the German, French and Italian economies.

1.2. Wide economic growth disparities in Europe

1.2.1 *Weakness in the euro area*

While in the United States GDP rose by more than 3% in 2003, growth in the euro area was a scant 0.5%. Growth was significantly higher in the EU, thanks in part to the firm resistance of the United Kingdom's

economy to the deflationary pressures that seemed to threaten the main euro-area economies. The euro area emerged as the world economy's weakest link in 2003. But signs of export-driven recovery became evident at the end of 2003. Throughout the year, consumption gains had not outpaced increases in purchasing power and had therefore remained slight. Uncertainty about unemployment and long-term income growth, in connection with the pension reforms underway in the leading countries, heightened consumer caution. Business investment continued to be contained by weak demand and the necessary reshuffling of debt levels, while production capacities remained under-utilised. The contribution of public investment was very modest. The ECB's two-stage reduction of its main refinancing rate, to 2% in June 2003, struck many economic observers as insufficient in view of the modest inflationary pressures, with the euro's appreciation offsetting very substantial hikes in raw materials, priced in dollars. The expansionary impact of lower interest rates was thwarted by the euro's rise against major currencies -- so much so that the euro area was sidelined for most of 2003 from the upward swing of the world economy. Government budgets were severely strained by this flat activity, with a number of area economies exceeding the 3% lid on public deficits stipulated by the growth and stability pact. Most countries were obliged to adopt neutral, if not mildly restrictive, fiscal policies.

1.2.2 A more positive trend in Western Europe outside the euro area

Within the EU, it was in the United Kingdom in particular that economic activity began to increase in the second half of 2003. Over the full year, the growth rate was 2.1%, due to brisk private consumption and government spending. Consumption was sustained by falling unemployment and the low level of interest rates, while public spending reflected the priority accorded to measures promoting health care and education. In Sweden, the economy grew by 1.6%, while growth in Denmark slowed nearly to zero. In both of these countries, private consumption expenditures and government spending contracted, while exports

weakened. Business investment declined over the course of 2003.

Outside the EU, Switzerland experienced a modest recession caused by shrinking business investment and a drawdown of inventories not offset by the rise in exports, even if the low level of interest rates contributed to a depreciation of the currency. Norway saw very modest 0.4% growth in GDP -- the lowest in 15 years. High interest rates sustaining a strong currency contributed to a slowdown in private expenditure, under the impact of rising unemployment rates and corporate bankruptcies. For its part, Iceland saw its economy rebound in 2003 from the recession in 2002, which had itself been the result of policies to counter overheating at the beginning of the decade.

1.2.3 Eastern Europe on a positive slope

The economy strengthened in Eastern Europe in 2003, despite disparities from one country to another. The region's GDP rose by 3.8% -- an improvement over 2002 and, in any event, a far better performance than that of the EU. In Eastern Europe, domestic demand was the primary source of growth, just as it had been in 2001 and 2002. Except in Poland and the Slovak Republic, exports were not a major factor in the positive growth outcome. Thanks to more than ten years of restructuring these countries' economies, and to expanding production capacities, Eastern European producers were able to meet rising demand and bolster their shares of EU markets, despite the weakness of those markets. Improvement in Eastern Europe's banking sector, and better access to credit, helped strengthen these economies.

Even if all Eastern European economies experienced growth in 2003, there were disparities from one country to another. In Poland, for example, after two years of stagnation the economy gathered pace in 2003, culminating in full-year GDP growth of more than 3.5%. Expansionary fiscal and monetary policy and improved competitiveness, conducive to exports, explain this outcome. At the same time, the economy slowed somewhat in Hungary and Slovenia, with

growth rates of less than 3%. Over the same period, economic growth quickened in the Czech Republic, as compared with 2002, even if the final outcome for 2003 did not exceed 3%. In all of these countries, growth was driven by domestic demand, the contribution of exports having been modest, albeit greater as the year went on.

It was in Latvia and Lithuania that growth was greatest, with rates of 7% and 8.9%, respectively. Both countries enjoyed strong growth in all components of final demand. Growth was also high (in excess of 4%) in Albania, Bulgaria, Croatia, Estonia, Romania and the Slovak Republic, which was the only one of these countries whose GDP growth was attributable to exports alone. Elsewhere, foreign trade did not contribute to the strong growth, with surging imports -- reflecting the vitality of final demand -- counteracting the rebound in exports.

In south-eastern Europe, economic activity on the whole was weaker. In Serbia and Montenegro, the economy was flat, reflecting a difficult adjustment to economic opening and initial restructuring. In FYR Macedonia, a recovery took hold, even if all the consequences of the 2001 civil conflict had not yet faded. Bosnia and Herzegovina remained in the grip of a recession in 2003 for the fourth consecutive year.

1.2.4 *Strong dynamism in the CIS*

After slowing slightly in 2002, the economy accelerated sharply in the CIS in 2003, led by the enviable performance of the Russian Federation. The CIS was one of the world's fastest-growing regions, since aggregate GDP expanded there in 2003 by more than 7.5%. The combination of brisk internal demand and high raw materials prices created a climate conducive to business. After several years of restructuring and institutional changes to lay the groundwork for a market economy, rising living standards and a budding feeling of confidence explain the firmness of final demand. Russia's role as a driving force for the CIS was not belied. The combination of an expansionary monetary policy and a drop in the value of the currency was conducive to exports, while strong

demand for petroleum products increased disposable income. At the same time, the restructuring of public enterprises, spurred by international competition, began to yield tangible results. The spillover effects from Russian Federation imports continued, as shown by the fact that growth, while slower, once again topped 6% in the Republic of Moldova.

1.3. Factors behind the positive trends at work in Eastern Europe

Eastern Europe sustained relatively brisk economic growth in 2003 despite a lacklustre environment in the EU. A more-than-ten-year process of economic modernisation and adaptation, thanks to a stream of foreign direct investment, combined with the vitality of domestic demand, helped shield the area from the stagnation prevailing elsewhere in Europe. Eastern Europe's performance in 2003 was actually shaped by two opposing trends. First, the recovery of world trade was providing market outlets for economies that had become competitive, while the need to keep government deficits in check had brought about a relatively restrictive fiscal policy. Clearly, it was the export-driven recovery that cleared the way for a more measured fiscal stance after two years of stimulus. The entry in 2004 of eight of these countries into the EU, along with Cyprus and Malta, culminated the efforts made to bring their institutions and regulatory structures up to standard.

1.3.1 *Prudent budgetary and monetary policies*

The area's average public deficit shrank from 4.1% in 2002 to 3.1% in 2003. Concerns about the long-term sustainability of deficits -- and thus of debt levels -- for certain countries, including Hungary and Poland, prompted the region's main economies to make their budget policies more prudent. One example of this is Slovenia, where a vast restructuring of government spending was carried out. Some of this spending, however, stemmed from economic restructuring and modernisation, such as environmental protection, making it difficult for any major shift towards policies

that would be more restrictive. These public deficits were no longer financed to a large extent by central bank lending, but by loans taken out abroad. This was a positive step in terms of the fight against inflation, but it increased these economies' vulnerability to movements of international capital. For its part, monetary policy ran up against the same obstacles: while there was an easing of inflationary pressures, from imported goods in particular, the persistence of twin deficits ran counter to the looser monetary policies initiated by certain countries. Examples here include Croatia and Romania. There were only a few exceptions to these prudent policies. In the Czech Republic, for example, economic policy remained expansionary. The case of Poland was comparable. What this means is that all the room for manoeuvre to sustain the economy had been exhausted, albeit with positive outcomes.

The volatility of foreign exchange markets in 2003 had repercussions for the currencies of the Central and Eastern European countries. Insofar as most of the region's currencies are pegged more or less directly to the euro, they appreciated against the dollar. Forced to contend with heightened competition from South-East Asian countries, whose exports are priced in dollars, the countries of Eastern Europe achieved a lessening of these pressures through the disinflation trend launched successfully by many of them. While the Hungarian forint was shaken in 2003, due more to internal imbalances than to currency market disarray, for most countries in the region the consolidation of financial systems and prudent policies blunted the disruptions experienced by the leading currencies in 2003.

1.3.2 Successes in disinflation and intermediation by the banking system

The trend towards disinflation was due more to the productivity gains achieved by economies than to macroeconomic stabilization policies. Wage inflation became more moderate in most economies, even if pay rises outpaced consumer price inflation. Only in Bulgaria, Latvia, Poland, Romania and the Slovak Republic did salary increases lag behind inflation.

Nevertheless, economic growth, which continued to be accompanied by a restructuring of production capacities geared to greater efficiency, caused labour productivity to rise more than wages. That is the primary cause of the disinflation trend characterising the region's economies. Inflation levels, except in Romania, fell to historic lows, confirming a trend begun in 2001 and 2002. Only in Croatia, Latvia and the Slovak Republic did inflation levels in 2003 exceed those of 2002, although in Croatia and Latvia those levels remained low. Because of productivity gains, corporate profitability increased after a difficult year in 2002.

One of the characteristics of the year 2003 in Eastern Europe was the expansion of credit, reflecting a consolidation of the banking system and greater confidence amongst economic agents in the outlook for their economies. Bank intermediation also played its role to the full in re-monetising economies. Households and businesses alike reaped the full benefits of the new services on offer, which sustained economic demand and was a condition of survival for companies having to meet capital investment needs or to weather temporary difficulties.

1.3.3 *External account deficits becoming sustainable*

The current accounts of most countries in the region continued to show deficits in 2003. For many countries, however, and especially for those which were candidates for accession to the EU in 2004, financing those deficits posed no problem. Furthermore, the deficits of a large majority of countries were stabilizing, and surpluses on services and transfers financed deficits on other items. Estonia and a number of other countries, including Bulgaria, Bosnia and Herzegovina, Latvia and Serbia and Montenegro, were exceptions to this favourable situation. In Estonia, the foreign trade deficit was equivalent to 14% of the wealth created by the economy in 2003. That situation was due to a sharp influx of imports driven by personal consumption and business investment.

With a few exceptions, such as Croatia and Latvia, exports increased in late 2003, reversing the trend of 2002 so that in third-quarter 2003 the growth rate of exports was more than 10% on an annualised basis. Over the first nine months of 2003, year-on-year export growth was more than 9%. The region racked up successes on EU markets, but in intra-regional trade as well, thanks to the improved competitiveness of its products on the leading export markets. In this regard, the strong export performances of the Slovak and Polish economies stand out. For the Slovak Republic, this was due to exports of new vehicles to the EU and Russia, while the competitiveness of the Polish economy was strengthened by depreciation of the zloty and enhanced labour productivity. For the region, however, despite everything, rising living standards triggered substantial waves of imports, explaining the external accounts' scant net contribution to economic growth.

1.3.4 Improving conditions in terms of employment

There were a number of signs of improvement with regard to employment in 2003. The number of jobs stopped falling, and the unemployment rate progressed slightly. This turnaround followed several years of adjustment in which intense industrial restructuring had prompted a massive shift in jobs between sectors and between firms. During that process, the number of jobs lost had exceeded the number of jobs gained. The balance in terms of jobs began to stabilize in 2002, with declining unemployment in a number of area economies. In 2003, the reversal of the trend became widespread, and between November 2002 and November 2003 the region's average unemployment rate dipped by practically half a percentage point. Despite that improvement, average unemployment in Eastern Europe remained high, at around 15% of the labour force, for a regional total of some eight million jobless. But that was down by more than 300 000 on year-end 2002. At the end of 2003, there were substantial disparities between countries, with unemployment rates ranging from 8% in Hungary to 18% in Poland. It was in the Slovak Republic that the employment situation improved most in 2003,

since the jobless rate fell there by practically three percentage points. The influx of foreign direct investment in the productive sector and services contributed to job creation in the country, but another factor underlying the undeniable improvement was the introduction of stricter eligibility requirements for unemployment benefits. The Baltic States were also among the countries in which the employment situation improved, with new jobs created in construction, manufacturing and services.

1.4. Exceptional showings in the CIS, despite persistent pockets of fragility

After cooling slightly in 2002, economic growth resumed with great vitality in the CIS in 2003. While the bulk of aggregate figures can be attributed to the region's leading economy -- that of Russia -- activity was especially brisk in all of the CIS countries, most of which posted double-digit growth rates. CIS countries which export raw materials reaped the full benefits of high international market prices. Adding to this was region-specific growth spawned by mutual reinforcement of trade within the CIS, driven by rising private consumption. Cautious policies, along with structural reforms intended to make the transformations in progress permanent, played a significant role in this positive overall situation, even if it must be emphasized that much remains to be done. Efforts were begun in 2003 to bolster co-operation and integration in the region, showing that the authorities have been striving continuously to improve the institutional foundations of the transformations at work there.

1.4.1 Prudent stimulation policies

The macroeconomic policies followed in 2003 in the CIS were slightly conducive to economic stimulation, recent strides in budget consolidation having offered governments latitude which was put to good use. Because of the budget shifting carried out over the years prior to 2003, budget deficits on the whole were clearly less than those in Eastern Europe. The resumption of growth also contributed to this fiscal

consolidation. It can be said that budget policies were not tightened again in the CIS in 2003, which had a slightly favourable economic impact. In oil exporting countries, the high level of prices throughout the year triggered a very sharp rise in budget revenue, with the prospect for ultimate neutralisation through the creation of a stabilization fund to smooth out the effects of price fluctuations and accumulate resources when conditions are favourable. These same stabilization funds are also intended to shield the economy from inflationary pressures resulting from a sudden influx in oil revenues. The slightly positive stance of monetary policy was made possible by prospects for disinflation, although not all of these were confirmed. In Russia's case, an accommodating monetary policy sought to preclude appreciation of the rouble. Despite everything, caution was still the rule, insofar as some countries, and particularly those lacking raw materials, have a high level of foreign debt and depend on outside capital to offset a trade imbalance. It was for this reason that in Moldova monetary policy was tightened.

Currency values were affected by two opposing trends: the fall of the dollar, which is used as a target currency, and the rise of the rouble. Most countries actually experienced a depreciation of real exchange rates, which brought additional, export-driven, stimulus. At the same time, however, rising wages and thus income sped up imports and, on balance, in most countries, foreign trade's net contribution was not positive in terms of trade in goods.

1.4.2 *Adjustment difficulties despite growth in investment*

Capital investment expenditures gathered pace in 2003 in a number of CIS countries, while for the most part remaining high. In Russia, net investment rose continuously throughout 2003 due to the enhanced profitability of export firms, especially in the oil industry. Construction of new export infrastructure by CIS oil-producing countries was another contributing factor. It should be added that capital investment was on the rise in non-oil sectors as well, with gross fixed

capital formation having been one of the main sources of growth in final demand in the CIS in 2003.

Despite everything, the restructuring of industry was slowed by the weakness of foreign direct investment in sectors other than oil. The perception that institutions lack stability, and the lack of protection against organised crime, discourage potential investors. Weaknesses in the banking system, an inhospitable reception for foreigners who take over businesses and the underdevelopment of financial markets are all obstacles to rapid economic restructuring. While the authorities perceive the need to diversify the economy's sources of financing, reforms to achieve that goal still fall short of the mark. The fact that the transformation of the industrial base has not yet been finalised constitutes the main obstacle on the way to a virtuous circle of recovery. Even in the case of Russia, which is relatively advanced as compared with the other countries in the region, the dichotomy between export sectors and the rest of industry remains troubling. While available statistics show that defaults on payments continue to diminish, over 40% of Russian businesses are recording losses. The situation is similar in Ukraine and probably worse in Belarus. There, the banking sector has not been performing its role as an intermediary, and loans to businesses cover only about 5% of the amount of capital investment. There is no doubt that, except in major export sectors, access to financing for capital investment is problematic. In countries where loans to business expanded rapidly, as in Belarus and Ukraine, the banks are either State-run, with a risk of misallocation of resources, or undercapitalised and exposed to a risk of repayment default. Financing problems are even more pronounced in low-income CIS countries. One special feature of CIS countries which are endowed with raw materials and record substantial surpluses in their trade balance for goods and services, is a tendency to invest capital abroad, depriving their respective national economies of resources. This heightens the fragility of the productive system.

1.4.3 *A resurgence of inflation*

The trend towards an easing of inflation which emerged in 2000 and gathered pace in 2002 came to a halt in 2003. With few exceptions, price increases in the CIS were higher in 2003 than in 2002 and even exceeded the most pessimistic forecasts. Poor harvests, in both the spring and the autumn, put pressure on farm prices, which make up most of the consumer price index in the CIS. The weakness of the dollar, which serves as a reference currency, meant that currencies depreciated, adding another inflationary factor with the increase in the price of imported goods. Fiscal and monetary policies were accommodating and, at the same time, higher oil revenue injected liquidity into the economy. Even if labour productivity rose by rates in excess of 10% in most of the constituent countries of the CIS, wage increases were even more impressive. These increases added inflation driven by demand for consumer goods to the inflationary pressure of production costs. Inflation rates would have been even higher if the authorities had not imposed price control measures, which would suggest that actual inflation had been even greater than what these figures show. For example, despite price controls in November and December, annual inflation was 12% in Russia in 2003.

1.4.4 *A difficult social situation*

The very substantial wage increases granted by employers were awarded in a context of rising unemployment. The corollary to industrial restructuring, involving a rationalisation of production processes and thus substantially greater labour productivity, is a reduction in the number of jobs offered by the economy. This process of jobless growth is affecting the various countries comprising the CIS to differing extents, and the statistics available convey only an imperfect understanding of the problem, given the large number of unemployed persons not reflected in the statistics. Nevertheless, the subsistence of a worrisome pocket of poverty in the population shows that the CIS countries are beset by major social problems.

2. FREIGHT TRANSPORT

2.1. Freight transport in the Western European countries

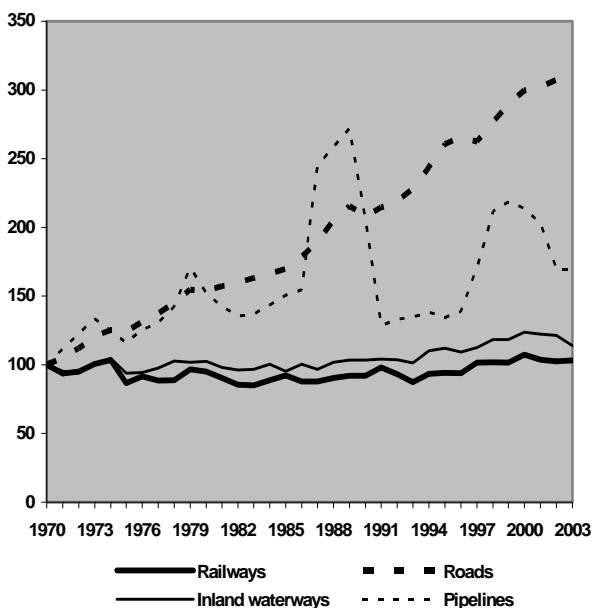
In the countries of Western Europe, road freight transport dominated the market in 2003, accounting for more than 78% of the combined tonne-kilometres carried by rail, road and inland waterway.

Trends in market share (in %) of the various modes Freight transport in t-km

	1980	1985	1990	1995	2000	2003
Rail	23.3	21.7	18.4	15.8	15.8	14.8
Road	66.5	69.2	73.1	76.5	76.9	78.6
Inland waterways	10.2	9.1	8.4	7.6	7.4	6.6
	100	100	100	100	100	100

A closer look at the trends over time shows that road freight has been steadily capturing market share from rail and inland waterway transport. However, while inland waterway transport is bearing up under the trend, the modal share of rail transport in 2003 stood at less than 50% of its share in 1970 (31.1%).

Freight transport trends (tonne-kilometres) Western European countries – 1970 = 100



Source: ECMT

Railways	18 countries : AUT,BEL,CHE,DEU,DNK,ESP,FIN, FRA,GBR,GRC,IRL,ITA,LUX,NLD,NOR,PRT,SWE, TUR
Roads	16 countries : AUT,BEL,CHE,DEU,DNK,ESP,FIN, FRA,GBR,GRC,ITA,LUX,NLD,NOR,
Inland waterways	10 countries : AUT,BEL,CHE,DEU,FIN,FRA,GBR, ITA,LUX,NLD
Pipelines	12 countries : AUT,BEL,CHE,DEU,DNK,ESP,FRA, GBR,ITA,NLD,NOR,TUR

Road freight transport

In 2003, road freight transport in Western Europe was not directly affected by flat industrial activity in those countries. Tonne-kilometres carried by western road hauliers were up by over 1.6% on 2002. For this reason, road freight transport reached a record level in 2003.

Looking at the situation in 2003 country by country, the enviable performance of road freight transport in Spain, Ireland and Luxembourg stands out,

with respectively +4.2%, +10% and +12.7%. It may be noted, however, that Sweden recorded virtual stagnation in 2003. Other countries for which data are available, in contrast, show contractions in road freight transport. Here, it may be noted that the most significant declines in 2003 were recorded in Portugal (-8.2%) and Finland (-4.3%). For its part, Germany experienced growth (+2%) comparable to that of Austria (+1.8%). However, the contractions in activity did not involve very large volumes, so the overall performance of road freight transport was not affected.

A longer-term look at the trends shows that total tonne-kilometres in the road freight sector increased by a factor of more than 3.3 over the period 1970-2003, despite the gloomy economic situation in 2003. This was the strongest performance of all modes of inland transport in Western Europe, and it shows that road freight transport is affected only slightly by economic downturns. The progress made on European construction, and the resultant expansion of international trade, benefited road haulage undertakings directly.

Rail freight transport

Compared with road freight, the 2003 performance of rail freight transport in the countries of Western Europe was more average. Tonne-kilometres carried by 18 rail networks were up by 0.7% on 2002. The weak performance of the Norwegian (-7.7%), Irish (-6.6%) and French (-6.4%) networks may be noted. Several other networks recorded a decrease, including those of Luxembourg (-8.1%) and Portugal (which dropped by 5.6%). The Austrian network reported a decline in activity of roughly 1.5%.

In contrast with this overall trend, which belied the declarations of intent by the heads of the rail networks and the wishes of policymakers, a number of countries reported a growth in activity -- on the Netherlands (+8.8%), German (+4%), Finnish (also +4%), Spanish (+1.3%) and United Kingdom (+1.1%) networks.

Clearly, the negative trend of rail freight transport in the countries of Western Europe in 2002 was

reversed in 2003, yet the performance was only a weak one. This shows that this mode is affected by more than cyclical variations, since tonne-kilometres carried in 2003 were at the same level as in 1998, whereas over the same period the economy had grown. Furthermore, between 1970 and 2003, rail freight was virtually flat, registering the weakest performance of any mode of inland freight transport.

The reason for the lesser performance of rail freight transport is to be found in the inadequate quality of the services provided. Whether it was on account of infrastructure capacity problems, stemming from delicate tradeoffs between freight trains and passenger trains, or a shortage of drivers or locomotives, it seemed very difficult for rail networks to cope with a level of freight activity barely above that of 1970.

This lacklustre rail freight performance is reflected in trans-Alpine traffic statistics. On the Alpine segment between Mont Cenis/Frejus and Brenner, rail's share of aggregate freight traffic was 37% in 2003 -- a performance comparable on all counts to that of 2002. In 2003, 63.2% of the freight crossing the Swiss Alps was carried by rail. In France and Austria, these shares fell to 23.6% and 27.2%. In 2003, 1 250 000 heavy goods vehicles crossed the Swiss Alps, or just as many as in the previous year. In contrast, the freight carried by these HGVs has climbed by 30% since the year 2000.

It can thus be seen that, despite the obstacle posed by Switzerland's heavy vehicle fees, road freight hauliers managed to increase their tonnages. In comparison, the performance of the railways seems less clear-cut. Admittedly, use of the possibility of "free access" on international corridors -- perceived as a solution to the lack of dynamism of purely national rail networks -- increased, but only very small volumes were involved. For example, a prerequisite for improving the international performance of the railways is to authorise the drivers of one network to drive trains on another network, which in turn requires that the training received by drivers in one country be recognised in another. While it is clear that the future growth of European transport lies in international transport, the numerous and varied

impediments to interoperability, which rail networks have to deal with when operating international services, attest to the magnitude of the task to be accomplished.

Inland waterways

Tonne-kilometres carried via inland waterways fell by 6.2% in 2003, compared with 2002. This overall figure was valid for ten countries of Western Europe. More specifically, inland waterway traffic decreased substantially in Austria (-20%). In contrast with the lone positive trend noted in Belgium (+1.9%), in 2003 inland waterway transport fell in Luxembourg by over 14% and in Finland by just over 4%. In Germany, activity was also down in 2003, with a decline of 9.4% from 2002.

Looking at the traffic on a few significant waterways, it may be noted without surprise that the exceptionally low water levels in the Rhine basin affected all traffic along the river. As a result, for the first time in years the volume of transport recorded at Emmerich-Lobith fell below 150 million tonnes. Data for Germany show, however, that despite unfavourable flow coefficients, containerised traffic rose to a record level in 2003. Aggregate growth for all German waterways, as compared with 2002, was 9%. On the Main-Danube canal, after a record year in 2002, drought in 2003, as elsewhere in Western Europe with inevitable repercussions on navigation, disrupted transport on the Danube. The volume of traffic recorded on the canal declined by practically 19% as compared with the 2002 performance.

A look at the longer-term trends shows that in 2003, despite the poor showing for the year, the volume in tonne-kilometres carried by inland waterway transport in Western Europe was up by more than 15% on 1970 -- an enviable achievement compared with the performance of rail transport, which was flat over the same period, but it still fell far short of the results for road freight. Admittedly, the latter mode covers Western Europe via a very dense network of roads -- an advantage that it is impossible for the other modes, and inland waterways in particular, to offset.

Oil pipeline transport

Data supplied or estimated for 12 countries show that oil pipeline transport seems to have been virtually flat in 2003 as compared with 2002. Pipeline transport of petroleum products and chemicals only barely confirmed its steady growth, due mainly to the fall in oil pipeline transport through Norway (-3%) and Spain (-5%). In contrast, the volume grew significantly in France (+6.4%), while remaining flat in Germany and Denmark. The other data available show scant rises which tend to confirm the fairly bleak overall picture for 2003.

Leaving aside the impact of major investment and geostrategic conflicts, which make any long-term comparison subject to caution, it may be noted that the growth of oil pipeline transport over the period 1970-2003 was uneven but nonetheless positive, making it one of the primary means of transporting chemicals and petroleum products.

2.2. Freight transport in the Central and Eastern European countries and the Baltic States

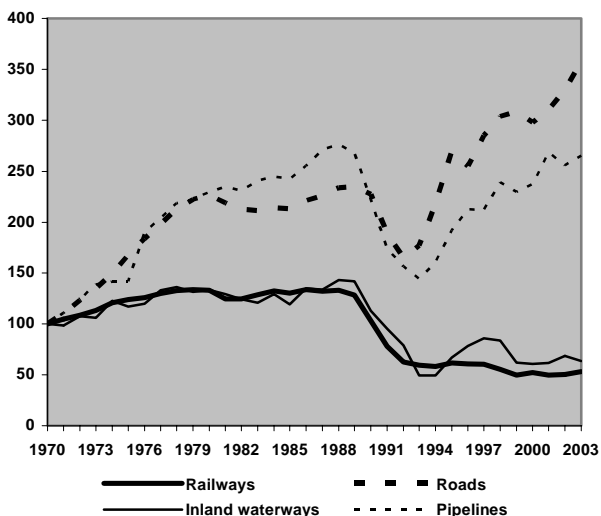
In the Central and Eastern European countries and the Baltic States, rail has lost the dominant position it held in 1990 -- and the even more dominant one of 1970 -- to road transport, which in 2003 carried over 57% of the combined tonne-kilometres conveyed by the three main modes of inland transport.

Inland waterway transport also saw its market decline, but to a lesser extent than rail, which was the big loser in the process of economic transformation.

Trends in market share (in %) of the various modes Freight transport in t-km

	1980	1985	1990	1995	2000	2003
Rail	71.1	72.1	66.0	50.8	44.4	40.4
Road	25.5	24.8	30.6	46.6	53.2	57.3
Inland waterways	3.3	3.1	3.4	2.6	2.4	2.3
	100	100	100	100	100	100

Trends in freight transport (tonne-kilometres) - Eastern Europe and the Baltic States 1970=100



Source: ECMT

Railways	15 countries : ALB,BGR,BIH,CZE,EST,HRV, HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN
Roads	15 countries : ALB,BGR,BIH,CZE,EST,HRV, HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN
Inland waterways	11 countries : BGR,CZE,EST,HRV,HUN,LTU, LVA,POL,ROM,SCG,SVK
Pipelines	10 countries : ALB,BGR,CZE,HRV,HUN,LTU, LVAPOL,ROM,SCG

Road freight transport

Road freight transport in the CEECs and the Baltic States saw a large increase in the tonne-kilometres carried by their hauliers in 2003, averaging more than 8%. This is greater than previous figures recorded since 1998.

Tonne-kilometres reached record levels in 2003 in the CEECs and the Baltic States, where road haulage is the leading mode for freight transport -- a position it has held in these countries since 1998.

No negative notes were recorded in 2003, with the highest growth rates found in FYR Macedonia (+56.6%), Estonia (+46.5%), Romania (+24.2%), Bulgaria (+16.7%),

Slovenia (+12.9%), Croatia (+11.2%) and Albania (+7.6%). In addition, substantial growth was confirmed in Lithuania (+7%) and the Slovak Republic (+12.9%). Only in Hungary was the number of tonne-kilometres carried practically unchanged (+0.3%).

The strong showing of the CEECs and the Baltic States, despite the bleak European economic climate, was directly discernible in the above figures for road freight transport. Buoyant exports to both the EU and the CIS strengthened the lead these countries are taking in transport growth.

In all, it would seem that road transport has bettered its performance by a factor of nearly 3.5 over the period 1970-2003 in the CEECs and the Baltic States, with a particularly rapid spurt in growth from 1993 onwards -- except for 1996, when growth was negative -- coinciding with the first visible signs of economic recovery in the region. The drops in traffic recorded over the period 1990-93 were thus wiped out very swiftly. One point to be noted above all is that overall performance during the period 1970-2003 is comparable in all respects to that seen in road freight transport in Western Europe at the same time, the only difference being the very rapid acceleration in the increase in tonne-kilometres carried by road in the CEECs and the Baltic States from 1995 onwards.

Rail freight transport

Rail freight transport experienced enviable growth in 2003 in the CEECs and the Baltic States, with growth in tonne-kilometres of more than 5%. In all, and in spite of everything, the volume of rail freight transport in these countries was practically only half as great in 2003 as it had been in 1970 -- a level of activity which, furthermore, was not even 40% of the all-time high reached in 1988.

The result recorded in 2003 stemmed from strong showings by the networks of Latvia (+19.5%), Lithuania (+17.3%), Serbia and Montenegro (practically +14%) and Croatia (+12.7%).

These strong showings were also sustained by other networks, such as those of Slovenia (+6.4%), Estonia (+4%) and Poland (+3.8%).

After a steady overall decline ever since the process of transition began, interrupted only in 1995 and 2000, 2003 emerges as a year of renewal, since the only networks to experience a decline in volume were those of Romania and the Slovak Republic. The continuation of transit flows from the rapidly-expanding Russian Federation network explains the good showing in certain countries.

It can therefore be stated that the favourable economic outlook in the CEECs offered a rebound to the railroads, which until now had had to come to grips with a process that looked like an inevitable decline. That decline reflects a structural economic change working to the advantage of road transport, which has proved better able to adapt to a different economic situation, characterised by an opening up to new external markets.

Inland waterway transport

Inland waterway transport in the CEECs and the Baltic States saw a roughly 7.5% decline in tonnage carried in 2003 compared with 2002, when tonne-kilometres carried had been on the rise. There was therefore no further break in the downward trend which had prevailed throughout 1998, 1999 and 2000. The tonne-kilometres carried in 2003 represented less than half of the activity recorded prior to the process of transition. It should be pointed out, however, that this downward trend was compounded by traffic difficulties on the former Yugoslavian part of the Danube, which severely penalised inland waterway transport.

Among the poor performances were those of the Polish (-22.6%) and Czech (-13.1%) networks. In contrast, the Bulgarian network recorded exceptional growth, in excess of 30%. Croatia recorded a more than 5% decline in activity, although volumes remained low in absolute value.

All told, an overview of the long-term trend shows that inland waterways seem to have lost nearly half of their freight transport business since the start of the transition process -- a remarkably poor performance, albeit less so than that of rail transport. It must be borne in mind, however, that the geostrategic conflicts which shook the region have had major repercussions on the performance of inland waterway transport over the past ten years.

Oil pipeline transport

After a mixed year in 2002, there was an upswing in oil pipeline transport in 2003, with especially steep growth in Poland, where the volume rose by 14.5%. In contrast, although the quantities involved were much smaller, there were decreases of more than 10.5% in Romania and 1.5% in Bulgaria. Poland -- the region's leading market -- therefore accounted for the overall trend

Strong showings in the Czech Republic (+6%), Hungary (+4.8%) and Croatia (+4.2%) confirmed that trend.

Overall, oil pipeline transport does not seem to have declined since 1990; indeed, it even grew over that period by more than 20% -- an enviable performance compared with that of rail or inland waterway transport. It should also be noted that the number of tonne-kilometres carried by oil pipeline in the region was more than four and a half times the volume carried via inland waterways.

2.3. Freight transport in the CIS

In the constituent states of the CIS, rail had confirmed its position as the dominant mode for freight transport in 2002, accounting for practically 87% of the market in tonne-kilometres, with road transport carrying only a little more than 9% and inland waterways a scant 4%.

Given the foregoing, the performance of rail can be taken as an indicator of the economic situation and,

in this respect, it may be noted that rail transport in Belarus and Moldova increased by more than 10%, those two countries having been the only ones to furnish these data for 2003. While this was a very positive performance, it fell short of the growth recorded in 2002, as compared with 2001. Actually, rail activity had been strong in all of the CIS countries in 2002.

Despite these signs of recovery, which were discernible throughout the period 1999-2003, rail transport in the CIS had carried only a little more than 55% as many tonne-kilometres in 2002 as in 1990, reflecting an economic situation which, while clearly improving as a result of the positive reforms implemented, was still being affected by the decline of heavy industries and the gradual rationalisation of production processes.

Following an 8% increase in tonne-kilometres carried by road in the CIS in 1999, compared with 1998, the years 2000 and 2001 again brought good results, with new growth in road freight traffic of over 5% each year. This was a reversal of the trend that had become apparent since 1990, when road transport registered a steady decline in activity, falling to its lowest point in 1998, with a business activity index of 38.2 (100=1990). This reversal of the trend had been broadly confirmed in 2002, although to a significantly lesser extent than in 2000 and 2001, since road freight transport in the CIS had grown that year by just over 4.3%.

Performances in 2003 cannot be assessed, since only Belarus (with -3.7%) and Moldova (+35.7%) provided data. These diverging trends compound the difficulty of making any overall evaluation, but they confirm the results of 2002, when road freight traffic had been down sharply in Belarus (by over 8.5%) and had risen very steeply in Moldova (+84%).

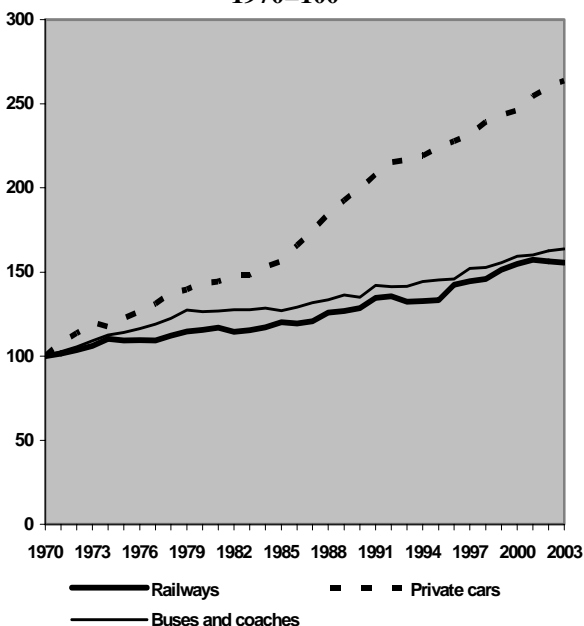
In the inland waterway sector, the only data available are for Belarus, which reported an increase in activity of over 150% for 2003, although the volumes involved were very small.

The Secretariat received no figures for 2003 on transport by oil pipeline in the CIS countries.

3. PASSENGER TRANSPORT

3.1 Passenger transport in the countries of Western Europe

Trends in passenger transport
(passenger-kilometres) - Western Europe
1970=100



Source: ECMT

Railways 18 countries : AUT,BEL,CHE,DEU,DNK,ESP, FIN,FRA,GBR,GRC,IRL,ITA,LUX,NLD,NOR, PRT,SWE,TUR

Private cars 15 countries : BEL,CHE,DEU,DNK,ESP,FIN, FRA,GBR,GRC,ISL,ITA,NLD,NOR,PRT,SWE

Buses and coaches 15 countries : BEL,CHE,DEU,DNK,ESP,FIN, FRA,GBR,GRC,ISL,ITA,NLD,NOR,PRT,SWE

Passenger transport by rail

Passenger transport by rail continued to decrease in 2003 in the countries of Western Europe, which recorded a drop of 0.6% in passenger-kilometres compared with 2002 figures. This overall decrease came

in the wake of a 0.9% reduction in 2002 over 2001. That decline had nonetheless been in contrast with the growth recorded in 1998 and 1999 (when passenger-kilometres had increased by 4.3% and 3.1%, respectively).

The poor overall performance for the year 2003 stemmed from notable declines for the railway networks in Greece (-14.3%), the Netherlands (-6.5%), Norway (-3.1%) and Luxembourg (-2.2%). The Irish network also suffered a decline (of 1.7%). In contrast, no network recorded sharp growth, if one disregards the case of the United Kingdom, which saw a brisk rise in passenger traffic volume (+3%), while the Portuguese network suffered a sharp decline. The figures for France show that the country experienced a moderate decrease of 1.6% in the number of passenger-kilometres carried on its network in 2003.

In all, the number of passenger-kilometres travelled on the rail networks of Western Europe in 2003 shows an increase of over 50% since 1970. Since 1990, traffic had decreased only twice -- in 1993 and 2002, with 2003 bringing another year of decline.

Passenger transport by bus and coach

After a positive overall performance in 2002, when it had grown by 1.2%, passenger transport by bus and coach, measured in passenger-kilometres, recorded lesser growth in 2003. Measured or estimated for fifteen countries, it grew by 0.6%.

The figure was due in part to the strong growth of passenger transport by bus and coach in Portugal. The only other countries reporting increases in passenger-kilometres transported by bus and coach were Sweden (+4%), Iceland (+2.5%) and the United Kingdom (+2.2%).

In contrast, Spain suffered a decline of 1.5%, while France experienced a rise in the overall average of transport by bus and coach. For its part, Norway recorded a notable decline in these same services (-4.1%).

In all, passenger transport by bus and coach increased by over 56% from 1970 to 2003 and was able,

in 2000, 2001, 2002 and 2003, to make up the decline in activity seen in 1999. As a result, 2003 was a record year, in contrast to rail passenger transport.

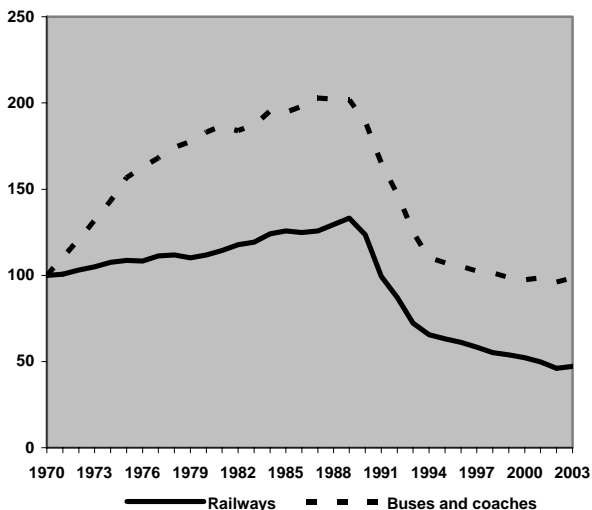
Transport by car

Travel by private car in passenger-kilometres appears to have risen dramatically since 1970, increasing in overall volume by a factor of almost 2.6, despite the slight fall recorded for 2000. In contrast, growth was significant in all three of the following years, with practically 1.5% in 2003, on the heels of a 2.3% rise in 2002.

This good performance can be explained by the increase in traffic in 2003 in Spain (+3.2%), Iceland (+2.5%) and Norway (also +2.5%). The Netherlands (+1.3%) experienced an increase in the overall average. To a lesser extent, travel by car in passenger-kilometres was also up in France (+0.7%) and Sweden (+0.2%), and in no country did the volume of passenger-kilometres decline.

3.2. Passenger transport in the CEECs and the Baltic States

Trends in passenger transport (passenger-kilometres) - Eastern Europe and the Baltic States - 1970=100



Source: ECMT

Railways 15 countries : ALB,BGR,BIH,CZE,EST,HRV,
HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN
Buses and coaches 15 countries : ALB,BGR,BIH,CZE,EST,HRV,
HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN

Passenger transport by rail

Passenger transport by rail did not continue its decline in the CEECs throughout 2003. Passenger-kilometres travelled on the region's rail networks overall appear to be up by 2.5% in 2003 compared with 2002, reversing the trend recorded in 2002 as compared with 2001.

The biggest increases in activity were recorded in Poland (+13.5%), Slovenia (+3.7%), Estonia (+2.8%) and Latvia (+2.4%). Other large markets, such as the Slovak Republic, declined by practically 14%.

Several other countries experienced unfavourable trends: Lithuania with -13.3%; FYR Macedonia with -6.1%;

and Slovenia with -13.6%. But these three countries had little impact, given the increase in passenger rail traffic in Poland.

All told, after more than a decade of decline, interrupted only in 2003, the number of passenger-kilometres recorded by the rail networks of Central and Eastern Europe in 2003 came to just barely over 45% of the total travelled in 1970, and practically one-third of their performance in 1989, showing that the railways were the biggest losers during the transition to a market economy and the purchasing power gains that came with it.

Passenger transport by bus and coach

The interruption, in 2001, of the downward trend in passenger transport by bus and coach in the CEECs and the Baltic States was repeated in 2003. In fact, volume seems to have risen by 2.4% in 2003 from 2002, reversing the downward slope that had been broken only once since 1988, in 2001.

This overall picture is the net result of trends in Romania (+78.8%), FYR Macedonia (+29%) and Albania (+10.7%). In other countries, such as Lithuania (+6%) and Poland (+2.4%), lesser growth was recorded.

The region's rare instances of declining traffic growth, in countries like Bulgaria (-18.9%), the Slovak Republic (-5.8%) and Slovenia (-6.8%), were not enough to offset the upswing in a majority of countries.

Overall, with the years of persistent decline experienced since 1990 and broken only in 2001 and 2003, passenger transport by bus and coach in the CEECs in 2003 seems to have been slightly below its 1970 levels, despite having peaked in 1989, when it had been twice as high as in 1970.

Transport by car

If modes of public passenger transport were the losers in the march towards market economies and

rising living standards, individual motorised transport seems to have recorded further growth in 2003.

The number of passenger-kilometres travelled by private car has been increasing steadily since 1987 in the CEECs and showed a further increase, of 2%, in 2003.

Of the five countries which provided data (Albania, Czech Republic, Hungary, Slovak Republic, and Serbia and Montenegro), none reported a decrease in traffic. For its part, Albania boasted a substantial increase, up 7%. The Czech Republic and Serbia and Montenegro recorded positive, albeit near-average, growth (of respectively +3.2% and +2%).

3.3. Passenger transport in the CIS countries

Passenger transport by rail

After a steady decline in passenger-kilometres since 1994, broken only in 2000, 2003 saw a further fall in passenger transport by rail in Belarus (-7%) and Moldova (-0.8%). These were the only two countries which provided information in respect of 2003. The railways' level of activity in 2002 had been down from the performance recorded in 1990. It is therefore possible that a further decline took place in 2003.

Passenger transport by bus and coach

After falling by an average of 4.75% in the CIS countries in 2001, passenger transport by bus and coach had declined again in 2002, by 2.5%.

For 2003, only Moldova and Belarus provided data, with both countries reporting growth of 25.6% and 0.4% respectively.

4. ROAD SAFETY

In 2003, road accidents in the ECMT Member countries killed over 90 000 people and injured more than two million. While these figures show a decline in fatalities from the previous year, they still represent a frightening human sacrifice on the roads. Every year, the number killed is equivalent to the population of a town such as Namur (Belgium), Nancy (France) or Reykjavik (Iceland), and the number hospitalised to that of a city such as Rome (Italy), Lisbon (Portugal), Nagoya (Japan) or Denver (United States).

In any event, these figures reflect significantly different situations from one country or region to another.

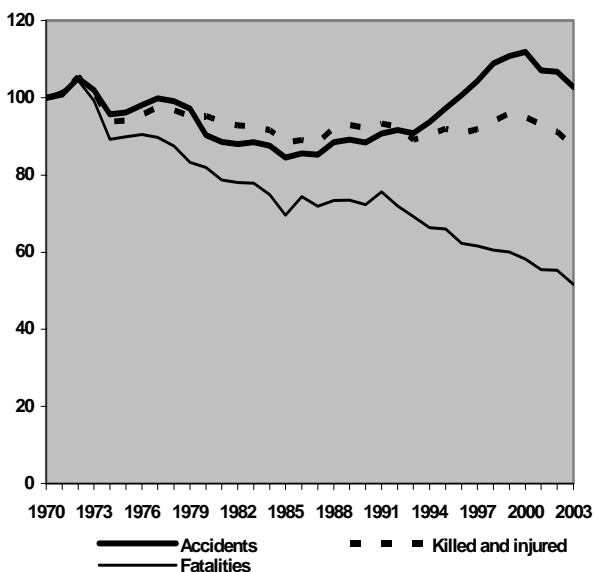
4.1. Road safety figures for the countries of Western Europe

In the countries of Western Europe, all indicators pertaining to road safety showed an improvement in 2003, after the progress that had already been made in 2002:

- The number of *accidents* fell by more than 3.7% -- a significant figure which confirms the end, recorded in 2000, of a period of six consecutive years during which the number had risen (by 22% between 1993 and 1999).
- The number of *casualties* (injured + killed) on Western European roads fell by 4.5% in 2003 -- a greater percentage than the 2002 figure, confirming the end of a period of three consecutive years (1997-99) in which the situation had worsened.

- Lastly, the number of road *fatalities* fell very significantly, by practically 7% in 2003 -- an outcome thoroughly in line with the uninterrupted downward trend for this indicator since 1992. In all, the annual number of deaths on Western European roads was practically 50% lower in 2003 than in 1970.

Trends in road accidents (number) - Western Europe - 1970=100



Source: ECMT

Accidents	20 countries : AUT,BEL,CHE,DEU,DNK,ESP, FIN,FRA,GBR,GRC,IRL,ISL,ITA,LIE,LUX, NLD,NOR,PRT,SWE,TUR
Killed and injured	20 countries : AUT,BEL,CHE,DEU,DNK,ESP, FIN,FRA,GBR,GRC,IRL,ISL,ITA,LIE,LUX, NLD,NOR,PRT,SWE,TUR
Fatalities	20 countries : AUT,BEL,CHE,DEU,DNK,ESP, FIN,FRA,GBR,GRC,IRL,ISL,ITA,LIE,LUX, NLD,NOR,PRT,SWE,TUR

Despite this general improvement, the situation in 2003 showed some variations from one country to another in terms both of the most recent trends and of the relative degree of risk on the roads:

- While in 2003 the number of *fatalities* fell significantly in Greece (-4.7%), Ireland (-7.25%), France (-20.9%) and Iceland (-24.1%), it rose in the Netherlands (+4.2%), Switzerland (+2%) and, to a lesser extent, Spain (+1%) -- all three being exceptions among the West European countries.
- The number of *fatalities per million inhabitants* ranged from as many as 152 in Greece and Portugal, 127 in Belgium and 129 in Spain to 60 in Sweden, 64 in the Netherlands and 62 in the United Kingdom. For the record, the corresponding indicators were 148 in the United States, 102 in New Zealand, 88 in Australia and 75 in Japan.
- In relation to the number of cars on the roads, the number of *fatalities per million motor vehicles* varied from as many as 337 in Greece, 244 in Belgium and 215 in Ireland to 129 in Sweden and 115 in the United Kingdom. By way of comparison, the number of fatalities per million motor vehicles was 149 in New Zealand, 184 in the United States, 160 in Canada, 138 in Australia and 125 in Japan.

4.2. Road safety figures for Central and Eastern Europe

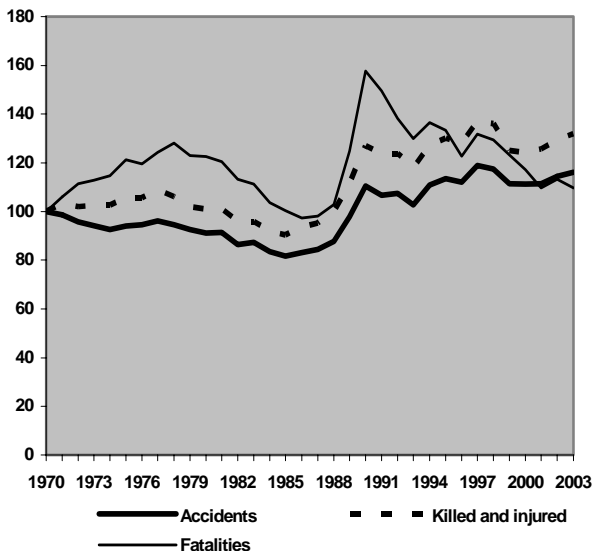
In the Central and Eastern European countries, the main statistical indicators for road safety in 2003 exhibited a less favourable trend than in Western Europe, although the situation varied across countries:

- The number of road accidents was up by 2.7% -- a deterioration which came on the heels of an improvement in 2002. As compared with 2000, the figure was up by more than 9%.
- The number of casualties (killed + injured) rose by 2.4%. Here again, we find confirmation of the upward trend observed in 2001, but contradicted in 2002. With this unfavourable

result, the number of casualties in 2003 was up by more than 5% on the figure for 2000.

- In 2003, there was a decrease of 2.9% in the number of *fatalities* on the roads of the Central and Eastern European countries. This reduction, which was relatively substantial, confirms the good results for 2000 (-4.8%) and 2001 (-4.7%). As a result, the overall number of fatalities since 1990 has decreased by nearly 30% in the CEE countries.

Trends in road accidents (number)
-- Eastern Europe and the Baltic States --
1970=100



Source: ECMT

Accidents	13 countries : ALB,BGR,CZE,EST,HRV,HUN,LTU,LVA,MKD,POL,ROM,SVK,SVN
Killed and injured	13 countries : ALB,BGR,CZE,EST,HRV,HUN,LTU,LVA,MKD,POL,ROM,SVK,SVN
Fatalities	13 countries : ALB,BGR,CZE,EST,HRV,HUN,LTU,LVA,MKD,POL,ROM,SVK,SVN

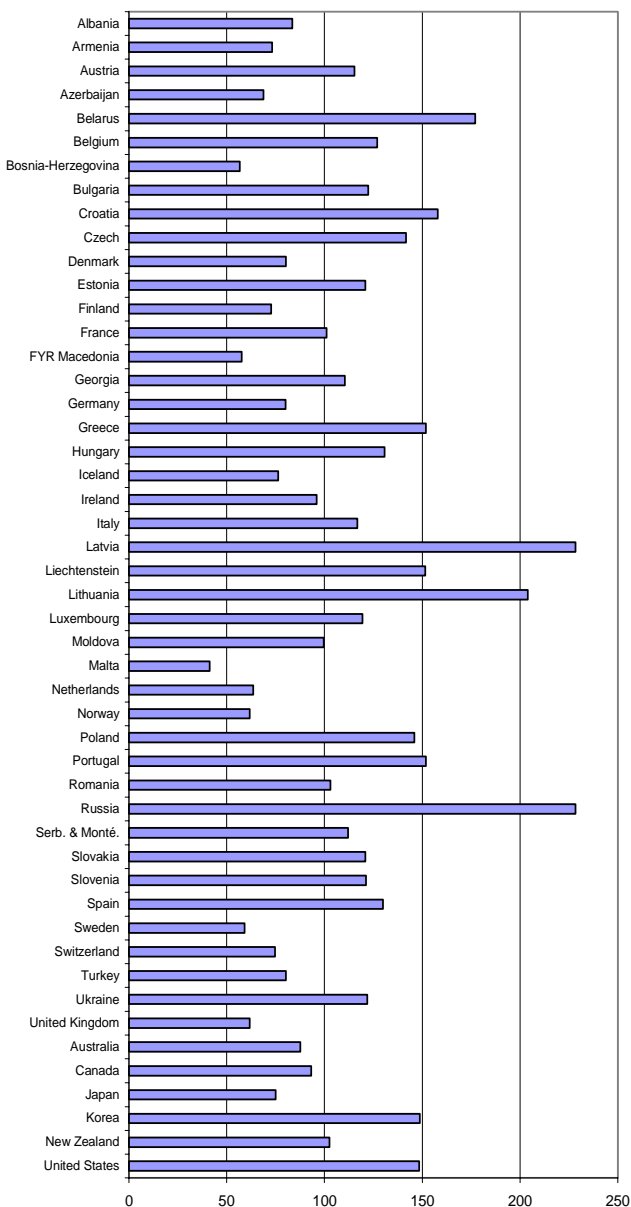
In terms both of the trend observed in 2003 and of the relative degree of risk on the roads in that year, however, we find very different situations from one country to another:

- In 2003, the number of *fatalities* fell very substantially in FYR Macedonia (-33%), Estonia (-26.8%), Slovenia (-9.7%), Romania (-6.8%) and Hungary (-7.2%). The situation of other CEECs worsened in this respect. The record in Croatia (+11.8%), Albania (+5.6%) and the Slovak Republic (+4.3%) was particularly bad.
- As regards the number of *fatalities per million inhabitants*, the situation also varied considerably from one country to another, the ratio being as high as 228 in Latvia, 203 in Lithuania and 146 in Poland, but no higher than 83 in Albania, 101 in FYR Macedonia and 57 in Bosnia and Herzegovina.
- The above figures provide certain information on the relative degree of risk on roads in the various countries, but they are influenced significantly by the levels of car ownership in each one. In order to get a better grasp of the situation, it is essential to take account of another indicator -- the number of *fatalities per million motor vehicles*. This varies considerably from one country to another, ranging from as many as 2 149 in Bosnia and Herzegovina, 1 450 in Albania and 726 in Latvia, to 337 in Estonia, 275 in Bulgaria and 217 in Slovenia. Although this indicator should be used cautiously, given the current uncertainty surrounding the assessment of the total number of cars on the roads, it nevertheless reveals rather different levels of road safety between Eastern and Western Europe.

4.3. Road safety figures for the countries of the CIS

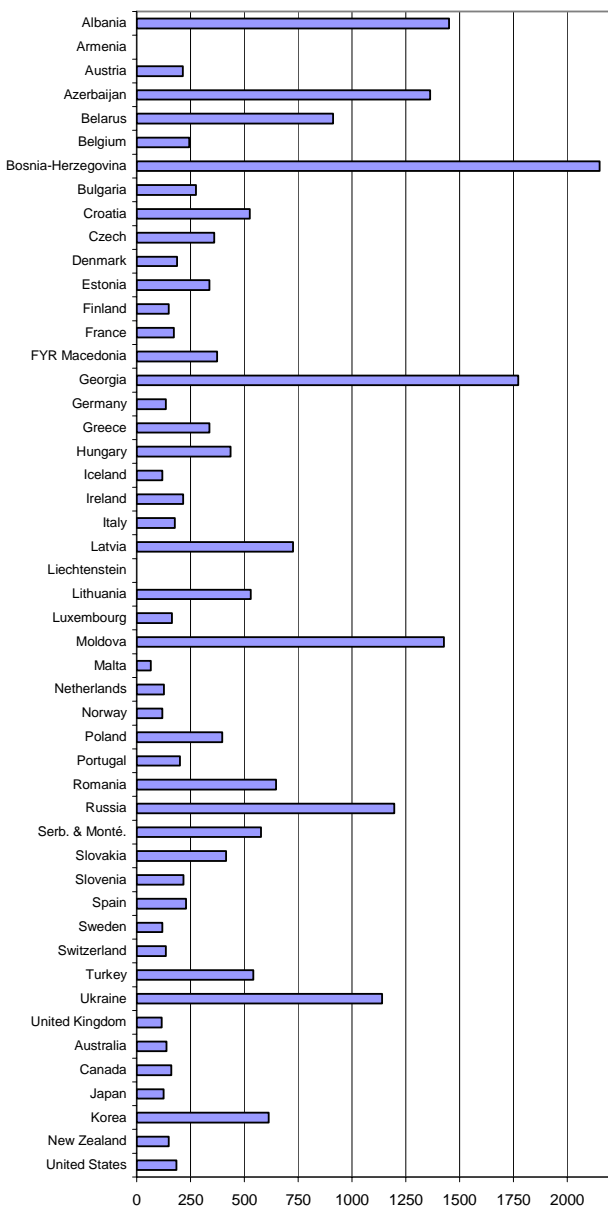
For 2003, CIS data comprise figures for Belarus, Georgia and Moldova. They show contrasting trends: the number of accidents was up by 5.1% in Georgia but down by practically 8% in Moldova. The number of casualties declined by 0.8% in Belarus and by 7.1% in Moldova but increased by 4.4% in Georgia. The number of fatalities on the roads rose in all three countries, up by 11.1% in Georgia, 3.4% in Belarus and 3.2% in Moldova. This particularly negative result contrasts with the steady fall in all indicators that had been seen every year since 1991, with the sole exceptions of 1998 and 2001.

Total number of deaths per million population in 2003



Source : ECMT

Total number of deaths per million road motor vehicles in 2003



Source : ECMT

TABLES

A. FREIGHT TRANSPORT

B. PASSENGER TRANSPORT

C. ROAD ACCIDENTS

FREIGHT TRANSPORT

Thousand million tonne-kilometres

Table A1 : Rail

	1970	1990	2000	2002	2003	03/02*
ALB	0.2	0.6	0.0	0.0	0.0	52.4
ARM			0.4			
AUT	9.9	12.7	16.6	17.1	16.9	-1.5
AZE	24.6	37.1	5.7			
BEL	7.8	8.4	7.7	7.3	7.3	0.2
BGR	13.9	14.1	5.5	4.6	5.3	14.0
BIH	3.4	4.0	0.1			
BLR	50.1	75.4	31.4	34.2	38.4	12.4
CHE	6.6	8.3	10.8	9.6		
CSK	55.9	59.5				
CZE			17.5	15.8	15.8	0.5
DEU	70.5	61.4	76.0	75.4	78.5	4.0
DNK	1.9	1.8	2.0	1.9	2.0	4.1
ESP	10.3	11.6	12.2	12.2	12.4	1.3
EST	5.0	7.0	8.1	9.7	9.7	-0.3
FIN	6.0	7.9	10.1	9.7	10.0	4.0
FRA	67.6	49.7	55.4	50.0	46.8	-6.4
GBR	24.6	16.0	18.1	18.7	18.9	1.1
GEO	9.8	10.8	3.9			
GRC	0.7	0.6	0.4	0.3	0.5	39.4
HRV	5.7	6.5	1.8	2.2	2.5	12.7
HUN	19.8	16.8	8.1	7.8	8.1	4.6
IRL	0.5	0.6	0.5	0.4	0.4	-6.6
ISL						
ITA	18.1	21.2	25.0	23.1		
LIE						
LTU	13.6	19.3	8.9	9.8	11.5	17.3
LUX	0.8	0.7	0.6	0.6	0.5	-8.1
LVA	15.5	18.5	13.3	15.0	18.0	19.5
MDA	10.4	14.8	1.5	2.7	3.0	10.5
MKD	0.6	0.8	0.5	0.3	0.4	11.7
MLT						
NLD	3.7	3.1	4.5	4.3	4.7	8.8
NOR	1.4	1.6	1.8	1.7	1.6	-7.7
POL	99.3	83.5	54.0	47.7	49.6	3.8
PRT	0.8	1.6	2.2	2.2	2.1	-5.6
ROM	48.0	57.3	18.0	17.5	16.9	-3.2
RUS	2,494.7	2,523.0 c	1,373.2	1,510.2		
SCG	6.2	7.7	2.0	2.3	2.6	13.7
SVK			11.2	10.4	10.1	-2.6
SVN	3.3	4.2	2.9	3.1	3.3	6.4
SWE	17.3	19.1	20.1	19.2	20.1	4.9
TUR	6.1	8.0	9.9	7.2		
UKR		488.2	172.8	193.1		
ECMT/WEST	254.5	234.2	273.9	260.9	262.8 e	0.7
ECMT/CEECs	290.4	299.8	152.0	146.4	153.9	5.1
ECMT/CIS	2,589.7	3,149.4	1,588.6	1,751.0	NA	-

ECMT/WEST = 18 countries : AUT,BEL,CHE,DEU,DNK,ESP,FIN,FRA,GBR,GRC,IRL,ITA,LUX,NLD,NOR,PRT,SWE,TUR

ECMT/CEECs = 15 countries : ALB,BGR,BIH,CZE,EST,HRV,HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%. e = estimate. c = change in the series.

FREIGHT TRANSPORT

Thousand million tonne-kilometres

Table A2 : Roads

	1970	1990	2000	2002	2003	03/02*
ALB	0.8	1.2	2.2	2.4	2.5	7.6
ARM			0.0			
AUT	2.9	9.0	17.2	17.8	18.1	1.8
AZE	3.7	3.3	3.5			
BEL	13.1	32.0	51.0	53.5		
BGR	7.0	13.8	3.1 c	3.9	4.6	16.7
BIH	0.8	3.1				
BLR	8.1	22.4	9.0	7.9	7.7	-3.7
CHE	4.8	11.5	21.9			
CSK	10.1	23.3				
CZE			39.0	45.1	46.6	3.3
DEU	78.0	169.9	280.7	285.2	290.9	2.0
DNK	7.8	9.4	11.0	11.1	11.0	-0.4
ESP	51.7	90.5	148.7	179.5	187.0	4.2
EST	2.3	4.5	3.9	4.4	6.4	46.5
FIN	12.4	25.4	27.8	28.1	26.9	-4.3
FRA	66.3	114.8	184.2	188.6	189.2	0.3
GBR	85.0	132.9	153.7	154.0	157.0	1.9
GEO		2.6	0.5			
GRC	7.0	12.5				
HRV	1.3	2.9	2.8	7.4	8.2	11.2
HUN	5.8	15.2	12.1	10.6	10.7	0.6
IRL		5.1	12.3	14.4	15.9	10.0
ISL			0.0	0.0	0.0	
ITA	58.7	177.9	158.6	160.0		
LIE	0.0	0.0	0.7			
LTU	3.4	7.3	7.8	10.7	11.5	7.0
LUX	0.1		0.4	0.5	0.6	12.7
LVA	2.9	5.9	4.8	6.2	6.8	9.8
MDA	3.2	6.3	1.0	0.8	1.0	35.7
MKD	0.8	2.2	0.8	2.6	4.1	56.6
MLT	0.0	0.0	0.0			
NLD	12.4	22.9	31.6	30.1	29.9	-0.7
NOR	3.2	8.2	13.0	13.6	13.2	-2.9
POL	15.8	40.3	72.8	74.7	78.2	4.7
PRT		10.9	7.5	8.8	8.1	-8.2
ROM	5.2	5.2	9.9	11.0	13.6	24.2
RUS	0.0	299.4	152.7	167.2		
SCG	2.8	9.3	2.7	3.1	3.3	7.0
SVK			14.3	14.9	16.9	12.9
SVN	2.1	4.9	5.3	4.6	4.7	2.1
SWE	17.5	29.2	38.1	36.5	36.6	0.3
TUR	17.4	65.7	161.6	150.9		
UKR		14.8	7.5	9.1		
ECMT/WEST	438.3	928.4	1,334.1	1,370.9 e	1,393.3 e	1.6
ECMT/CEECs	61.1	139.0	181.9	201.9	218.4	8.2
ECMT/CIS	15.0	348.7	174.2	190.6 e	NA	-

ECMT/WEST = 19 countries : AUT,BEL,CHE,DEU,DNK,ESP,FIN,FRA,GBR,GRC,IRL,ITA,LIE,LUX,NLD,NOR,PRT,SWE,TUR

ECMT/CEECs = 15 countries : ALB,BGR,BIH,CZE,EST,HRV,HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%. e = estimate c = change in the series

FREIGHT TRANSPORT

Thousand million tonne-kilometres

Table A3 : Inland waterways

	1970	1990	2000	2002	2003	03/02*
ALB						
ARM						
AUT	1.3	1.7	2.4	2.8	2.3	-20.0
AZE						
BEL	6.7	5.4	7.3	8.1	8.3	1.9
BGR	1.8	1.6	0.4	0.6	0.8	37.3
BIH						
BLR	1.2	1.8	0.0	0.1	0.2	171.2
CHE	0.1	0.2				
CSK	2.4	4.4				
CZE			0.8	0.6	0.5	-13.1
DEU	48.8	54.8	66.5	64.2	58.2	-9.4
DNK						
ESP						
EST	0.0	0.0	0.0			
FIN	2.0	1.1	0.4	0.4	0.4	-4.1
FRA	12.7	7.6	9.1	8.3	8.0	-3.0
GBR		0.2	0.2	0.2		
GEO						
GRC						
HRV	0.3	0.5	0.1	0.1	0.1	-5.6
HUN	1.8	2.0	0.9 c	1.7	1.5	-9.1
IRL						
ISL						
ITA	0.4	0.1	0.2	0.1		
LIE						
LTU	0.1	0.2	0.0	0.0	0.0	0.0
LUX	0.3	0.3	0.4	0.4	0.3	-14.1
LVA	0.1	0.3				
MDA	0.1	0.3			0.0	
MKD						
MLT						
NLD	30.7	35.7	41.3	40.9	39.9	-2.5
NOR						
POL	2.3	1.0	1.2	1.1	0.9	-22.6
PRT						
ROM	1.3	2.1	2.6	3.6	3.5	-3.3
RUS	163.9	213.9	71.0	80.2		
SCG	3.5	3.2	1.0	1.1	0.8	-23.0
SVK			1.4	0.6	0.5	-7.7
SVN						
SWE						
TUR						
UKR		11.9	13.3			
ECMT/WEST	103.4	107.1	127.9	125.5	117.7 e	-6.2
ECMT/CEECs	13.6	15.4	8.3	9.4	8.7	-7.4
ECMT/CIS	0.1	12.2	13.3	NA	NA	-

ECMT/WEST = 10 countries : AUT,BEL,CHE,DEU,FIN,FRA,GBR,ITA,LUX,NLD

ECMT/CEECs = 11 countries : BGR,CSK,EST,HRV,HUN,LTU,LVA,POL,ROM,SCG,SVK

ECMT/CIS = 5 countries : ARM,AZE,GEO,MDA,UKR

* -0.5% < 0 < 0.5% e = estimate c = change in the series

FREIGHT TRANSPORT

Thousand million tonne-kilometres

Table A4 : Pipeline

	1970	1990	2000	2002	2003	03/02*
ALB			0.0	0.0	0.0	0.0
ARM			1.3			
AUT	3.6	6.4	7.6	8.0	7.8	-2.5
AZE	1.0	3.4	1.4			
BEL	0.3	1.0	1.6			
BGR		0.6	0.4	0.3	0.3	-1.4
BIH						
BLR						
CHE	1.2	1.2	0.2	0.2		
CSK	6.4	7.5				
CZE			1.6	1.7	1.8	6.0
DEU	15.1	11.7	15.0	15.2	15.4	1.3
DNK		2.0	4.7	5.1	5.2	1.0
ESP	1.0	4.2	7.5	7.8	7.4	-5.0
EST						
FIN						
FRA	28.2	19.6	21.7	20.8	22.1	6.4
GBR	2.7	10.2	11.4			
GEO			5.0			
GRC						
HRV		3.6	0.7	1.6	1.6	4.2
HUN	1.0	5.3	4.0	4.9	5.1	4.8
IRL						
ISL						
ITA	9.1	11.5	10.3	10.8		
LIE						
LTU			3.5	4.9	5.1	3.9
LUX						
LVA			6.5	5.1	3.2	-37.9
MDA						
MKD						
MLT						
NLD	4.1	4.9	5.9	6.0	6.1	1.9
NOR		2.1	3.5	3.6	3.5	-3.0
POL	7.0	13.9	20.4	20.9	23.9	14.5
PRT						
ROM	1.8	5.1	1.4	1.8	1.6	-10.7
RUS	243.0	2,575.0 c	1,916.5			
SCG		0.1	0.1	0.4	0.4	1.9
SVK						
SVN						
SWE						
TUR	1.4	62.4	53.1	24.7		
UKR		208.0				
ECMT/WEST	66.7	137.2	142.5	112.8	113.2 e	0.3
ECMT/CEECs	16.2	36.0	38.5	41.5	43.0	3.6
ECMT/CIS	244.0	2,578.4	1,917.9	1,963.2 e	NA	-

ECMT/WEST = 12 countries : AUT,BEL,CHE,DEU,DNK,ESP,FRA, GBR, ITA,NLD,NOR,TUR

ECMT/CEECs = 10 countries : ALB,BGR,CZE,HRV,HUN,LTU,LVA, POL, ROM,SCG

ECMT/CIS = 2 countries : AZE,RUS

* -0.5% < 0 < 0.5%.

e = estimate

c = change in series

FREIGHT TRANSPORT

Thousand million tonne-kilometres

Table A5 : Total freight (A1+A2+A3+A4)

	1970	1990	2000	2002	2003	03/02*
ALB	0.9	1.8	2.2	2.4	2.6	7.9
ARM			1.7			
AUT	17.6	29.7	43.8	45.8	45.0	-1.6
AZE	29.3	43.7	10.5			
BEL	27.9	46.9	67.6			
BGR	22.7	30.1	9.4 c	9.4	10.9	16.0
BIH	4.2	7.1				
BLR	59.4	99.6	40.4	42.2	46.2	9.6
CHE	12.8	21.2				
CSK	74.8	94.7				
CZE			58.9	63.1	64.7	2.5
DEU	212.4	297.8	438.2	440.0	442.9	0.7
DNK	9.7	13.2	17.7	18.1	18.2	0.5
ESP	63.1	106.4	168.4	199.6	206.9	3.7
EST	7.4	11.5	12.0	14.1	16.1	14.3
FIN	20.4	34.4	38.3	38.2	37.3	-2.2
FRA	174.8	191.7	270.4	267.7	266.2	-0.6
GBR		159.3	183.4			
GEO	9.8	13.4	9.3			
GRC	7.6	13.1				
HRV	7.3	13.5	5.3	11.3	12.4	10.4
HUN	28.4	39.3	25.2 c	24.9	25.4	2.0
IRL	0.5	5.7	12.8	14.9	16.3	9.6
ISL						
ITA	86.2	210.7	194.0	193.9		
LIE			0.7			
LTU	17.1	26.8	20.1	25.4	28.0	10.4
LUX	1.2		1.5	1.4	1.4	-2.5
LVA	18.5	24.7	24.6	26.3	27.9	6.2
MDA	13.7	21.4	2.5	3.5	4.0	16.0
MKD	1.4	3.0	1.3	3.0	4.5	51.6
MLT						
NLD	50.9	66.5	83.2	81.3	80.6	-0.9
NOR	4.6	11.9	18.3	18.9	18.3	-3.3
POL	124.3	138.7	148.4	144.4	152.5	5.6
PRT	0.8	12.5	9.7	11.0	10.1	-7.6
ROM	56.4	69.6	31.9	33.9	35.7	5.3
RUS	2,901.6	5,611.3 c	3,513.4			
SCG	12.4	20.4	5.8	6.9	7.2	4.2
SVK			27.0	25.9	27.5	6.2
SVN	5.4	9.1	8.1	7.7	8.0	3.8
SWE	34.8	48.3	58.2	55.7	56.7	1.9
TUR	25.0	136.2	224.6	182.8		
UKR		722.9	193.7	202.3		
ECMT/WEST	862.9	1,406.9	1,878.3	1,870.1	1,886.9	0.9
ECMT/CEECs	381.3	490.2	380.6	399.1	424.0	6.2
ECMT/CIS	3,013.8	6,512.4	3,769.9	3,990.2 e	NA	-

ECMT/WEST = 19 countries : AUT,BEL,CHE,DEU,DNK,ESP,FIN,FRA, GBR,GRC,IRL,ITA,LIE,LUX,NLD,NOR,PRT,SWE,TUR

ECMT/CEECs = 15 countries : ALB,BGR,BIH,CZE,EST,HRV,HUN,LTU, LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%. e = estimate c = change in the series

PASSENGER TRANSPORT

Thousand million passenger-kilometres

Table B1 : Rail

	1970	1990	2000	2002	2003	03/02*
ALB	0.3	0.8	0.1	0.1	0.1	-14.6
ARM			0.0			
AUT	6.3	8.5	8.2	8.3	8.2	-0.6
AZE	1.7	1.8	0.5			
BEL	8.3	6.5	7.8	8.3	8.3	0.1
BGR	6.2	7.8	3.5	2.6	2.5	-3.1
BIH	1.7	1.4	0.0			
BLR	7.3	16.9	17.7	14.3	13.3	-7.0
CHE	8.2	11.1	12.8	14.2		
CSK	20.5	19.3				
CZE			7.3	6.6	6.5	-1.2
DEU	38.5	43.6	75.0	70.8	70.8	0.0
DNK	3.4	4.9	5.3	5.5	5.6	1.4
ESP	15.0	16.7	20.1	21.2	21.1	-0.3
EST	1.2	1.5	0.3	0.2	0.2	2.8
FIN	2.2	3.3	3.4	3.3	3.3	0.6
FRA	41.0	63.7	69.9 c	73.5	72.3	-1.6
GBR	30.4	33.2	38.2	39.7	40.9	3.0
GEO	2.1	2.0	0.5			
GRC	1.5	2.0	1.6	1.8	1.6	-14.3
HRV	3.7	3.4	1.3	1.2	1.2	-2.7
HUN	15.2	11.4	9.7	10.5	10.3	-2.3
IRL	0.8	1.2	1.4	1.6	1.6	-1.7
ISL						
ITA	32.5	44.7	47.1	45.6		
LIE						
LTU	2.1	3.6	0.6	0.5	0.4	-13.3
LUX	0.2	0.2	0.3	0.3	0.3	-2.2
LVA	3.8	5.4	0.7	0.7	0.8	2.4
MDA	0.8	1.6	0.3	0.4	0.4	-0.8
MKD	0.3	0.4	0.2 c	0.1	0.1	-6.1
MLT						
NLD	8.0	11.1	15.4	15.5	14.5	-6.5
NOR	1.9	2.4	3.4	3.0	2.9	-3.1
POL	36.9	50.4	19.7	17.3	19.6	13.5
PRT	3.5	5.7	3.8	3.9	3.6	-8.7
ROM	17.8	30.6	11.6	8.5	8.5	0.3
RUS	265.4	417.2	167.1	152.9		
SCG	3.7	4.8	1.4	1.1	1.0	-15.4
SVK			2.9	2.7	2.3	-13.6
SVN	1.5	1.4	0.7	0.7	0.8	3.7
SWE	4.6	6.6	8.3	9.3	9.4	1.1
TUR	5.6	6.4	5.8	5.2		
UKR		82.0	51.8	50.5		
ECMT/WEST	211.6	271.8	328.0	331.1	329.1 e	-0.6
ECMT/CEECs	115.1	142.2	60.0	53.0	54.3	2.5
ECMT/CIS	277.2	521.4	237.8	219.1	NA	-

ECMT/WEST = 18 countries : AUT,BEL,CHE,DEU,DNK,ESP,FIN,FRA,GBR,GRC,IRL,ITA,LUX,NLD,NOR,PRT,SWE,TUR

ECMT/CEECs = 15 countries : ALB,BGR,BIH,CZE,EST,HRV,HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%. e = estimate c = change in the series

PASSENGER TRANSPORT

Thousand million passenger-kilometres

Table B2 : Private cars

	1970	1990	2000	2002	2003	03/02*
ALB			5.1	5.9	6.3	7.0
ARM			1.3			
AUT		54.1				
AZE						
BEL	49.3	80.7	106.1	109.4	109.9	0.4
BGR		4.5				
BIH						
BLR						
CHE	41.8	73.3	80.6	83.9	85.3	1.6
CSK						
CZE			63.9	65.2	67.3	3.2
DEU	350.6	593.2	714.5			
DNK	33.3	50.3	59.8	60.7		
ESP	64.3	174.4	302.6	335.9	346.5	3.2
EST						
FIN	23.7	51.2	55.7	58.3	59.6	2.2
FRA	305.0	586.0	699.6	733.5	738.6	0.7
GBR	283.0	588.0	618.0			
GEO						
GRC		19.1				
HRV						
HUN	7.3	47.0	46.2	46.3	46.4	0.1
IRL						
ISL		2.7	3.8	4.1	4.2	2.5
ITA	211.9	522.6	716.4	780.6		
LIE						
LTU				16.0		
LUX						
LVA						
MDA						
MKD						
MLT						
NLD	66.3	137.3	141.1	144.2	146.1	1.3
NOR	17.8	42.7	46.8	49.4	50.6	2.5
POL		68.1 c	149.7	167.4		
PRT	13.8	40.5				
ROM						
RUS						
SCG	4.1	17.3	10.8	9.8	10.0	2.0
SVK			23.9	25.0	25.2	1.0
SVN						
SWE	60.2	86.4	91.1	93.8	94.0	0.2
TUR						
UKR				43.9		
ECMT/WEST	1,525.1	3,048.4	3,751.5	3,966.5	4,021.3 e	1.4
ECMT/CEECs	11.3	132.4	299.7	319.6	325.9 e	2.0
ECMT/CIS						

ECMT/WEST = 15 countries : BEL,CHE,DEU,DNK,ESP,FIN,FRA,GBR, GRC,ISL,ITA,NLD,NOR,PRT,SWE

ECMT/CEECs = 6 countries : ALB,CZE,HUN,POL,SCG,SVK

* -0.5% < 0 < 0.5% e = estimate c = change in the series

PASSENGER TRANSPORT

Thousand million passenger-kilometres

Table B3 : Buses and coaches

	1970	1990	2000	2002	2003	03/02*
ALB	0.8	2.2	0.2	0.2	0.2	10.7
ARM			0.1			
AUT		13.6				
AZE	3.1	6.7	9.3			
BEL	9.3	5.0 c	13.2	13.6	13.7	0.4
BGR	12.2	25.9	13.9	16.0	13.0	-18.9
BIH	1.2	2.7				
BLR	8.4	19.8	9.2	9.1	9.8	7.8
CHE	3.0	5.6				
CSK	21.4	43.4				
CZE			9.4	9.7	9.4	-2.2
DEU	48.6	56.6	69.0	75.7 c	75.8	
DNK	4.6	7.6	9.1	9.0		
ESP	20.9	33.4	50.3	50.1	49.3	-1.5
EST	2.6	4.5	2.6	2.3	2.3	-1.4
FIN	7.5	8.5	7.7	7.7	7.7	-0.4
FRA	25.2	41.3	43.0	42.2	42.6	0.9
GBR	60.0	46.0	47.0	46.0	47.0	2.2
GEO						
GRC	4.8	5.1				
HRV	3.3	7.0	3.3	3.6	3.7	4.5
HUN	13.5	24.1	18.4	18.4	18.6	1.1
IRL						
ISL		0.3	0.5	0.5	0.5	2.5
ITA	32.0	84.0	94.0	97.5		
LIE						
LTU	4.9	6.7	1.7	1.5	1.6	6.0
LUX						
LVA	3.3	5.9	2.3	2.4	2.6	8.0
MDA	1.9	4.9	1.0	1.3	1.6	25.6
MKD	1.0	1.5	0.8	1.0	1.3	29.0
MLT						
NLD	11.1	13.1				
NOR	4.2	4.6	6.3	6.1	5.9	-4.1
POL	29.1	46.3	31.7	29.3	30.0	2.4
PRT	4.4	10.3	11.8	9.9	10.5	6.0
ROM	7.9	24.0	7.7	5.3	9.4	78.8
RUS	100.1	262.2	164.4	149.9		
SCG	6.4	7.9	4.5	5.8	6.3	8.3
SVK			8.4	8.2	7.8	-5.8
SVN	2.6	6.6	1.6	1.1	1.1	-6.8
SWE	8.4	8.0	9.3	10.1	10.5	4.0
TUR						
UKR		90.3	9.9	10.9		
ECMT/WEST	244.0	329.4	389.0	396.9	399.2 e	0.6
ECMT/CEECs	110.4	208.5	107.7	106.0	108.5 e	2.4
ECMT/CIS	113.5	383.9	193.9	180.0	NA	-

ECMT/WEST = 15 countries : BEL,CHE,DEU,DNK,ESP,FIN,FRA,GBR,GRC,ISL,ITA,NLD,NOR,PRT,SWE

ECMT/CEECs = 14 countries : ALB,BGR,BIH,EST,HRV,HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%.

e = estimate

c = change in the series

PASSENGER TRANSPORT

Thousand million passenger-kilometres

Table B4 : Total road transport (B2+B3)

	1970	1990	2000	2002	2003	03/02*
ALB	0.8	2.2	5.3	6.1	6.5	7.1
ARM			1.4			
AUT		67.7				
AZE	3.1	6.7	9.3			
BEL	58.6	85.8	119.3	123.1	123.6	0.4
BGR	12.2	25.9	13.9	16.0	13.0	-18.9
BIH	1.2	2.7				
BLR	8.4	19.8	9.2	9.1	9.8	7.8
CHE	44.9	78.9				
CSK	21.4	43.4				
CZE			73.3	74.9	76.7	2.5
DEU	399.2	649.8	783.5			
DNK	37.9	57.9	69.0	69.6		
ESP	85.3	207.8	352.9	385.9	395.8	2.6
EST	2.6	4.5	2.6	2.3	2.3	-1.4
FIN	31.2	59.7	63.4	66.0	67.3	1.9
FRA	330.2	627.3	742.6	775.7	781.2	0.7
GBR	343.0	634.0	665.0			
GEO		8.3	4.5			
GRC		24.2				
HRV	3.3	7.0	3.3	3.6	3.7	4.5
HUN	20.8	71.1	64.6	64.7	65.0	0.4
IRL						
ISL		3.0	4.3	4.6	4.7	2.5
ITA	243.9	606.5	810.3	878.0		
LIE						
LTU	4.9	6.7	1.7	17.6 ¹		
LUX		0.0	0.0	0.0		
LVA	3.3	5.9	2.3	2.4	2.6	8.0
MDA	1.9	4.9	1.0	1.3	1.6	25.6
MKD	1.0	1.5	0.8	1.0	1.3	29.0
MLT						
NLD	77.4	150.4				
NOR	21.9	47.3	53.1	55.5	56.5	1.7
POL	29.1	114.4 ^c	181.4	196.7		
PRT	18.2	50.8				
ROM	7.9	24.0	7.7	5.3	9.4	78.8
RUS	100.1	262.2	164.4	149.9		
SCG	10.5	25.2	15.3	15.6	16.3	4.4
SVK			32.4	33.2	33.0	-0.7
SVN	2.6	6.6	1.6	1.1	1.1	-6.8
SWE	68.6	94.4	100.4	103.9	104.5	0.6
TUR	41.3	135.0	185.7	163.3		
UKR		90.3	9.9	54.8 ¹		
ECMT/WEST	1,810.3	3,512.8	4,326.2	4,526.7 ^e	4,585.9 ^e	1.3
ECMT/CEECs	121.7	340.9	407.4	441.7	450.8 ^e	2.1
ECMT/CIS	113.5	392.2	198.4	228.1	NA	-

ECMT/WEST = 16 countries : BEL,CHE,DEU,DNK,ESP,FIN,FRA,GBR, GRC,ISL,ITA,NLD,NOR,PRT,SWE,TUR

ECMT/CEECs = 15 countries : ALB,BGR,BIH,CZE,EST,HRV,HUN,LTU, LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%. e = estimate c = change in the series

1 : Private car passengers are included

PASSENGER TRANSPORT

Thousand million passenger-kilometres

Table B5 : Total passengers (B1+B4)

	1970	1990	2000	2002	2003	03/02*
ALB	1.0	3.0	5.4	6.2	6.6	6.7
ARM			1.5			
AUT		76.2	8.2	8.3	8.2	-0.6
AZE	4.8	8.5	9.8		0.0	
BEL	66.8	92.3	127.1	131.3	131.9	0.4
BGR	18.5	33.7	17.4	18.6	15.5	-16.7
BIH	3.0	4.1				
BLR	15.7	36.6	27.0	23.4	23.1	-1.3
CHE	53.0	89.9				
CSK	41.9	62.7				
CZE			80.6	81.5	83.3	2.2
DEU	437.7	693.4	858.5			
DNK	41.3	62.7	74.3	75.2		
ESP	100.2	224.5	373.0	407.1	416.9	2.4
EST	3.8	6.0	2.9	2.5	2.5	-1.1
FIN	33.4	63.0	66.8	69.3	70.6	1.8
FRA	371.2	691.0	812.5 c	849.2	853.5	0.5
GBR	373.4	667.2	703.2			
GEO	2.1	10.3	5.0			
GRC		26.2				
HRV	7.0	10.4	4.6	4.8	4.9	2.7
HUN	36.0	82.5	74.3	75.2	75.3	0.0
IRL	0.8	1.2	1.4	1.6	1.6	-1.7
ISL		3.0	4.3	4.6	4.7	2.5
ITA	276.4	651.3	857.5	923.6		
LIE						
LTU	7.0	10.3	2.3	18.1 ¹		
LUX	0.2	0.2	0.3	0.3	0.3	-2.2
LVA	7.1	11.2	3.1	3.1	3.3	6.7
MDA	2.6	6.5	1.3	1.7	2.0	19.9
MKD	1.4	1.8	1.0 c	1.1	1.4	26.0
MLT						
NLD	85.4	161.5				
NOR	23.9	49.8	56.4	58.5	59.4	1.5
POL	66.0	164.8 c	201.1	214.0		
PRT	21.7	56.5				
ROM	25.7	54.6	19.3	13.8	18.0	30.4
RUS	365.5	679.4	331.4	302.8		
SCG	14.2	30.0	16.7	16.8	17.3	3.0
SVK			35.2	35.9	35.3	-1.7
SVN	4.1	8.0	2.3	1.9	1.8	-2.6
SWE	73.2	101.0	108.7	113.2	113.9	0.6
TUR	46.9	141.4	191.5	168.5		
UKR		172.3	61.7	105.3 ¹		
ECMT/WEST	2,014.7	3,771.7	4,640.0	4,843.0	4,900.1 e	1.2
ECMT/CEECs	236.8	483.1	467.4	494.6	505.1 e	2.1
ECMT/CIS	390.7	913.7	436.2	447.2	NA	-

ECMT/WEST = 15 countries : BEL,CHE,DEU,DNK,ESP,FIN,FRA,GBR,GRC,ITA,NLD,NOR,PRT,SWE,TUR

ECMT/CEECs = 15 countries : ALB,BGR,BIH,CZE,EST,HRV,HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%. e = estimate c = change in the series

1 : Private car passengers are included

ROAD ACCIDENTS

Thousand

Table C1 : Number of accidents

	1970	1990	2000	2002	2003	03/02*
ALB			0.4	0.3	0.4	10.7
ARM			0.9			
AUT	51.6	46.3	42.1	43.2	43.4	0.6
AZE			2.0			
BEL	77.0	62.4	49.1			
BGR		6.5	6.9	6.8	7.0	3.4
BIH						
BLR			6.4	7.2	7.2	-0.2
CHE	28.7	23.8	23.7	23.6	23.8	0.8
CSK	33.5	30.1				
CZE			25.4	26.6	27.3	2.8
DEU	377.6	340.0	382.9	362.1	354.5	-2.1
DNK	19.8	9.2	7.3	7.1	6.7	-5.3
ESP	58.0	101.5	101.7	98.4	100.0	1.6
EST	2.2	2.1	1.5	2.2	1.9	-10.7
FIN	11.4	10.2	6.6	6.2	6.9	11.5
FRA	235.1	162.6	121.2	105.5	90.2	-14.5
GBR	272.8	265.6	242.1	228.5	214.0	-6.3
GEO	3.0	3.0	1.7	2.0	2.1	5.1
GRC	18.3	19.6	23.0	16.8	15.7	-6.3
HRV		14.5	14.4	17.1	18.6	8.9
HUN	23.2	27.8	17.5	19.7	20.0	1.5
IRL	6.4	6.1	7.8	6.6		
ISL	0.7	0.6	0.8			
ITA	307.7	161.8	228.9	237.8		
LIE	0.3	0.3	0.4	0.6	0.6	-2.9
LTU	4.7	5.1	5.8	6.1	6.0	-2.1
LUX	3.1	1.2	0.9	0.8	0.7	-14.3
LVA	4.7	4.3	4.5	5.1	5.4	5.8
MDA	3.1	6.0	2.6	2.9	2.7	-7.9
MKD	3.1	2.3	1.7	1.6	1.9	18.3
MLT			1.0	1.1	1.2	12.2
NLD	59.0	13.2	10.9	10.3	10.1	-2.1
NOR	9.3	8.8	8.4	8.7	8.1	-7.3
POL	41.8	50.5	57.3	53.6	51.1	-4.6
PRT	22.7	45.1	44.2	42.2	41.5	-1.7
ROM	4.9	9.7	7.6	7.0	6.7	-5.6
RUS		197.4	157.6	184.4		
SCG		33.6	48.8	52.1	55.6	6.7
SVK			7.9	7.9	8.6	8.7
SVN	8.3	5.2	8.5	10.2	11.7	14.5
SWE	16.6	17.0	15.8	16.9	18.4	8.4
TUR	19.2	115.3	466.4	439.8		
UKR		50.9	33.3	34.5		
ECMT/WEST	1,595.4	1,410.7	1,785.4	1,704.3	1,640.9 e	-3.7
ECMT/CEECs	143.3	191.8	208.2	216.1	222.0	2.7
ECMT/CIS	6.1	269.8	203.6	233.2	NA	-

ECMT/WEST = 21 countries : AUT,BEL,CHE,DEU,DNK,ESP,FIN,FRA, GBR,GRC,IRL,ISL,ITA,LIE,LUX,MLT,NLD,NOR,PRT, SWE,TUR

ECMT/CEECs = 15 countries : ALB,BGR,CSK,CZE,EST,HRV,HUN,LTU, LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%. e = estimate c = change in the series

ROAD ACCIDENTS

Thousand

Table C2 : Casualties [killed+injured]

	1970	1990	2000	2002	2003	03/02*
ALB			0.6	0.5	0.6	28.0
ARM			1.4			
AUT	72.7	62.0	55.9	57.6	57.8	0.3
AZE			2.2			
BEL	107.8	88.2	69.4			
BGR		8.4	9.0	9.1	9.4	4.3
BIH						
BLR			8.1	9.2	9.1	-0.8
CHE	37.7	30.2	30.7	30.3	30.6	1.2
CSK	44.2	40.4				
CZE			32.4	34.4	35.4	3.1
DEU	551.0	456.1	511.6	483.3	468.8	-3.0
DNK	26.7	11.3	9.6	9.3	8.8	-4.4
ESP	87.0	162.4	155.6	152.3	156.0	2.5
EST	2.3	2.8	2.0	3.1	2.7	-12.4
FIN	17.1	13.4	8.9	8.6	9.5	10.5
FRA	344.7	236.1	169.8	145.1	121.7	-16.1
GBR	371.5	352.9	335.0	314.5	290.6	-7.6
GEO	4.3	4.6	2.6	3.0	3.2	4.4
GRC	25.7	29.1	32.8	24.1	22.1	-8.4
HRV		21.2	21.2	24.6	26.9	9.4
HUN	31.9	39.4	23.9	27.4	28.0	2.0
IRL	9.8	9.9	12.5	9.6		
ISL	0.9	0.9	1.3			
ITA	238.4	227.6	328.3	344.6		
LIE	0.1	0.1	0.2	0.1	0.1	6.5
LTU	4.9	6.4	7.6	8.1	8.0	-1.9
LUX	2.5	1.8	1.3	1.2	1.1	-5.2
LVA	5.0	5.6	6.0	6.8	7.1	4.6
MDA	3.6	7.8	3.6	3.9	3.6	-7.1
MKD	2.7	3.3	2.5	2.6	2.9	10.3
MLT			1.2	1.3	1.2	-9.5
NLD	71.4	15.0	11.5	11.0	10.6	-3.8
NOR	12.3	12.2	12.0	12.7	11.9	-6.5
POL	37.8	66.9	71.6	67.5	63.9	-5.3
PRT	30.3	65.7	61.6	58.1	56.6	-2.5
ROM	6.3	11.9	8.8	8.2	7.8	-4.9
RUS		250.2	209.0	215.7		
SCG	1.8	27.4	17.7	15.6	16.8	7.7
SVK			10.7	10.9	12.0	10.0
SVN	11.2	7.1	11.9	14.2	16.9	19.3
SWE	23.5	23.3	22.6	25.3	27.6	9.2
TUR	20.8	94.0	118.0	116.4		
UKR		63.1	41.8	43.9		
ECMT/WEST	2,052.0	1,892.3	1,949.6	1,871.5	1,788.0 e	-4.5
ECMT/CEECs	169.8	240.7	226.1	232.9	238.4	2.4
ECMT/CIS	7.9	342.1	267.2	278.8	NA	-

ECMT/WEST = 21 countries : AUT,BEL,CHE,DEU,DNK,ESP,FIN,FRA,GBR,GRC,IRL,ISL,ITA,LIE,LUX,MLT,NLD,NOR,PRT,SWE,TUR

ECMT/CEECs = 15 countries : ALB,BGR,CSK,CZE,EST,HRV,HUN,LTU,LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%. e = estimate c = change in the series

ROAD ACCIDENTS

Thousand

Table C3 : Killed

	1970	1990	2000	2002	2003	03/02*
ALB			0.3	0.3	0.3	5.6
ARM			0.2			
AUT	2.2	1.4	1.0	1.0	0.9	-2.6
AZE			0.6			
BEL	3.0	2.0	1.5	1.3		
BGR		1.6	1.0	1.0	1.0	0.1
BIH						
BLR			1.6	1.7	1.8	2.0
CHE	1.7	1.0	0.6	0.5	0.5	6.4
CSK	2.2	2.0				
CZE			1.5	1.4	1.4	1.1
DEU	19.2	7.9	7.5	6.8	6.6	-3.3
DNK	1.2	0.6	0.5	0.5	0.4	-6.7
ESP	4.2	6.9	5.8	5.3	5.4	1.0
EST	0.3	0.4	0.2	0.2	0.2	-26.8
FIN	1.1	0.6	0.4	0.4	0.4	-8.7
FRA	15.1	10.3	7.6	7.2	5.7	-20.9
GBR	7.8	5.4	3.6	3.6	3.5	-2.0
GEO	0.8	1.1	0.5	0.5	0.6	11.1
GRC	0.9	1.7	2.0	1.7	1.6	-4.7
HRV		1.4	0.7	0.6	0.7	11.8
HUN	1.7	2.4	1.2	1.4	1.3	-7.2
IRL	0.5	0.5	0.4	0.4		
ISL	0.0	0.0	0.0	0.0	0.0	-24.1
ITA	10.2	6.6	6.6	6.7		
LIE	0.0	0.0	0.0		0.0	
LTU	0.7	0.9	0.6	0.7	0.7	1.7
LUX	0.1	0.1	0.1	0.1	0.1	-14.5
LVA	0.6	0.9	0.6	0.5	0.5	-4.8
MDA	0.6	1.1	0.4	0.4	0.4	3.2
MKD	0.1	0.2	0.2	0.2	0.1	-33.0
MLT			0.0	0.0	0.0	0.0
NLD	3.2	1.4	1.1	1.0	1.0	4.2
NOR	0.6	0.3	0.3	0.3	0.3	-9.7
POL	3.4	7.3	6.3	5.8	5.6	-3.2
PRT	1.4	2.3	1.6	1.5	1.4	-7.7
ROM	1.9	3.8	2.5	2.4	2.2	-6.8
RUS		35.4	29.6	33.2		
SCG	1.4	2.1	1.0	0.8	0.9	1.3
SVK			0.6	0.6	0.7	4.3
SVN	0.6	0.5	0.3	0.3	0.2	-9.7
SWE	1.3	0.8	0.6	0.6	0.5	-5.5
TUR	4.0	6.3	3.9	4.1		
UKR		9.6	5.2	6.0		
ECMT/WEST	77.7	56.2	45.2	43.0	40.1 e	-6.7
ECMT/CEECs	15.1 e	23.6	17.0	16.3	15.8	-2.9
ECMT/CIS	1.4	50.6 e	37.9	42.5 e	NA	-

ECMT/WEST = 21 countries : AUT,BEL,CHE,DEU,DNK,ESP,FIN,FRA, GBR,GRC,IRL,ISL,ITA,LIE,LUX,MLT,NLD,NOR,PRT, SWE,TUR

ECMT/CEECs = 15 countries : ALB,BGR,CSK,CZE,EST,HRV,HUN,LTU, LVA,MKD,POL,ROM,SCG,SVK,SVN

ECMT/CIS = 6 countries : AZE,BLR,GEO,MDA,RUS,UKR

* -0.5% < 0 < 0.5%. e = estimate c = change in the series