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Istanbul, 23 August 2012

## 22<sup>nd</sup> MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Conference Hall, Vatra-Elita Hotel  
Chisinau- Moldova  
Wednesday, 3 October 2012, at 09:00 hrs

### BSEC OUTLOOK 2012-I: BSEC-URTA INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE REPORT

Collecting statistical data and analysing the situation of international road transport facilitation and performance of the industry in the BSEC region is an important task of the BSEC-URTA International Secretariat. The present study tries to indicate the performance of the BSEC region in the fields of road transport and trade in the year 2012-I in comparison with 2011-I.

#### I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN THE YEAR 2012-I

According to the data collected from the BSEC-URTA Member Associations, the performance of the industry by country is given in the tables below.

2011-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL				65		21.513		37	3	87	315		22.020	11.396	10	33.426
AM				4	650	3	2	5	1.620			180	2.464	12		2.476
AZ				10	1.200		10	10	2.400		100	500	4.230	370	100	4.700
BG*		170			355	44.350		26.530	4.830	1.785	26.250	655	104.925	70.480	18.775	194.180
GE		3.822	3.711	193		278	63	168		25	4.120	1.374	13.754			13.754
GR													-			
MD	13	17	52	219	29	137		799	8.829	63	3.145	2.794	16.097	4.751	1.434	22.282
RO	35	31	39		100				1.573	3.474		4.456	9.708		2.137	11.845
RU																
SRB	105		4	9.384	8	22.264	1	17.203	7.532		3.300	7.387	67.188	146.083	72.749	286.020
TR	1.784	33	22.676	5.607	17.792	9.561	965	16.541	4.795	1.893		2.438	84.085	115.043	463.858	662.986
UA		514	2.690	6.342	2.400	1.498	18.232	12.100	22.845	1.502	7.890		76.013	307.677	87.607	471.297

Table 1) Road transport operations in BSEC region in 2011-I

2012-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	BSEC	EU24	Others	Total
AL				300		33.123	45	120	4	173	1.005	2	34.772	22.340	16	57.128
AM				7	750	4	2	7	1.800			160	2.730	13	2	2.745
AZ				10	800		20	20	3.000		50	500	4.400	515	500	5.415
BG*			400			58.880		50.860	5.945	5.465	42.045	1.560	165.155	56.680	7.740	229.575
GE		2.912	3.224	512		311	35	290	25		3.819	1.615	12.743			12.743
GR																
MD	6	42	132	420	396	170		552	18.724	90	960	756	22.248	4.238	2.868	29.354
RO	24	58	98		214				2.908	4.172		8.120	15.594			15.594
RU																
SRB	258		18	4.762	19	4.485	50	8.178	3.107		2.254	5.543	28.674	54.622	36.612	119.908
TR	1.678	20	14.158	6.016	32.858	7.287	755	15.095	4.652	1.897		1.940	86.356	115.747	369.822	571.925
UA		680	3.300	6.377	2.440	1.012	12.000	11.947	20.235	1.007	8.085		67.083	226.788	78.154	372.025

Table 2) Road transport operations in BSEC region in 2012-I

Figures 1 and 2, shows the total international trips in the BSEC region in 2011-I and 2012-I. Three categories: trips within the BSEC region, trips to the EU24 (EU countries except BG, GR and RO) and trips to the rest of the world. It is observed that in 2012-I the total road transport operations increased from 1,955,310 to 1,989,519 (1.8%). In 2012-I compared with 2011-I the share of operations within BSEC, to destinations other than BSEC and to EU24 has slightly increased

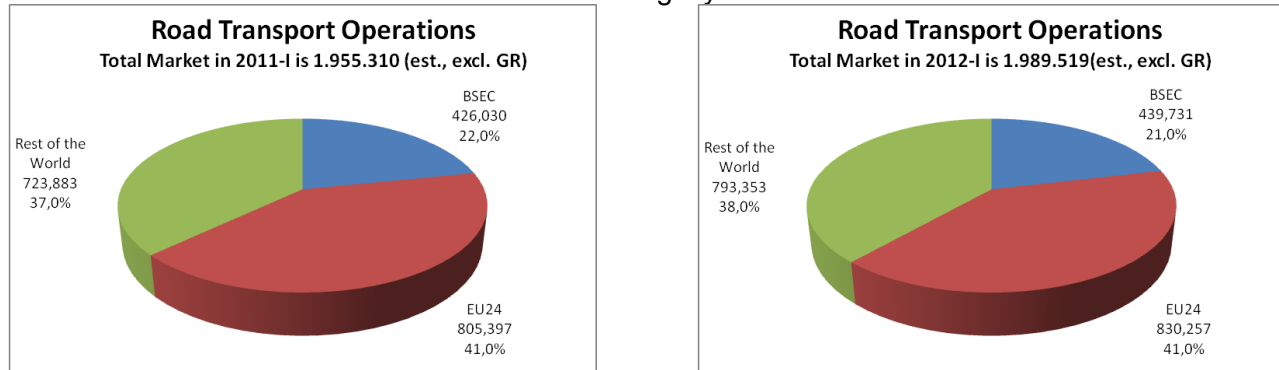


Fig.1) International road transport trips by the BSEC hauliers in 2011-I Fig.2) International road transport trips by the BSEC hauliers in 2012-I

Figure 3 shows the share between BSEC Countries in the whole international road transport market of the BSEC Region according to data for the 2012-I. Since there were no data provided for, GR and RUS, these countries are not included in the chart.

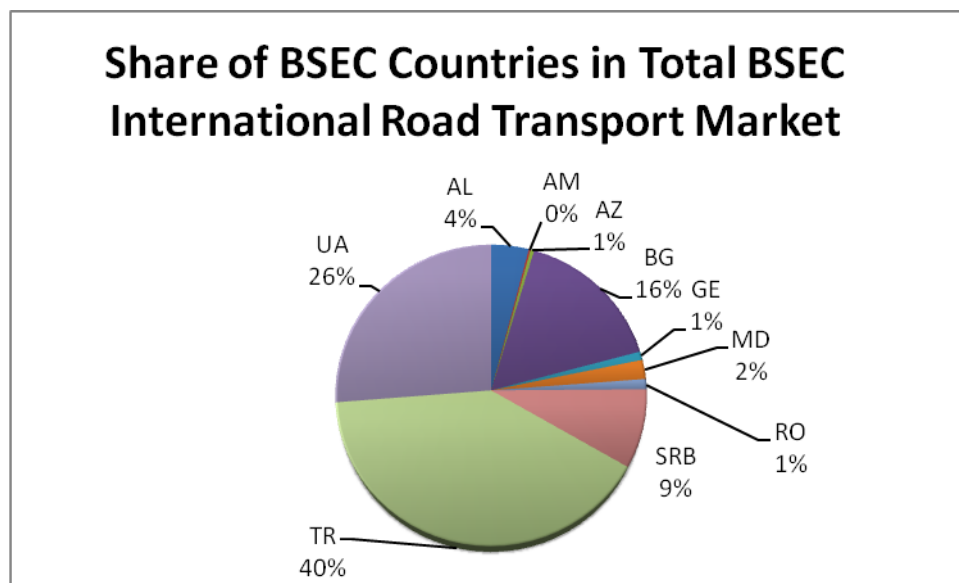


Fig.3) Share of BSEC Countries in the whole BSEC International Road Transport Market in 2012-I.

Table 3 shows the comparison of the situation at the BSEC International Road Transport Market in 2007-2012-I. Total number of trips has increased by approximately 2% comparing to 2011-I, from which it is observed an increase of 3 % within the BSEC and EU and 9,60% in the trips to the rest of the world.

	2007	2008	2009 (upd.)	% change to the previous period	2010	% change to the previous period	2011-I(*)	% change to the previous period	2012-I(*)	% change to the previous period
<b>Total number of trips</b>	2,602,545	3,028,321	2,825,029	-6,71	3,719,998	31,7%	1,955,310	0,79%	1,989,519	1,75%
<b>Trips within BSEC</b>	728,712	814,583	733,008	-10,01	736,673	0,49%	426,030	9,52%	439,731	3,22%
<b>Trips to EU24</b>	1,222,228	1,621,897	1,283,773	-20,85	1,630,391	27,0%	805,397	-5,3%	830,257	3,09%
<b>Trips to Rest of the World</b>	651,605	591,842	808,248	36,56	1,357,856	68,0%	723,883	3,31%	793,353	9,60%
<b>BSEC Trips/Total Trips, %</b>	28,7%	26,9%	25,9%		19,8%		21,8 %		22,1%	

Table 3) Comparative table of the BSEC International Road Transport Market in 2005-2012.

(\*) Estimated data preserves the tendency of the region excluding GR and RUS

## II. FOREIGN TRADE PERFORMANCE OF THE BSEC REGION

Based on the data provided by national statistics institutes in the BSEC Member States, the regional foreign trade performance in 2011-I and in 2012-I is presented in the tables below.

2011-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				44,3		324,4		23,5	43,8		207,6		643,6	3.522,9	18,27%
AM				144,1	57,0	20,0		50,0	497,0		98,7	119,7	986,5	2.498,0	39,49%
AZ													3.666,3	17.436,1	21,03%
BG	44,0	14,0	15,3		275,0	1.810,0	42,1	2.267,6	3.157,0	506,0	2.083,0	776,0	10.990,0	28.787,8	38,18%
GE	0,1	130,6	442,3	130,7		27,9	5,8	95,0	160,5	2,8	671,4	424,6	2.091,7	4.116,8	50,81%
GR	327,4	6,0	3,4	1.550,3	25,7		52,0	717,0	2.418,8	223,0	1.921,6	193,8	7.439,0	42.423,6	17,54%
MD	1,0	1,5	2,6	43,1	5,4	54,0		437,1	647,3	6,0	211,0	351,5	1.760,5	3.376,0	52,15%
RO	29,2	3,2	71,4	2.070,5	142,3	844,6	522,8		2.534,8	709,4	3.383,5	1.167,8	11.479,5	68.611,0	16,73%
RU		420,2	1.369,0	2.110,4	99,8	2.716,2	822,8	1.976,1			14.993,5	25.231,8	49.739,8	386.877,3	12,86%
SRB	72,1			400,1		237,5		914,8	1.626,7		289,1	373,1	3.913,4	15.465,0	25,30%
TR	198,3		1.033,0	2.074,5	622,5	2.019,3	271,5	3.397,0	13.763,4	278,0		3.509,4	27.166,9	185.311,0	14,66%
UA	31,0	121,8	782,2	508,1		300,0	405,2	1.024,0	24.322,1	228,0	2.697,0		30.014,2	71.196,2	42,16%
<b>BSEC Region Total Foreign Trade</b>													<b>149.891,4</b>	<b>829.621,7</b>	<b>18,07%</b>

Table 4) Foreign Trade of the BSEC Countries in 2011-I (in million USD)  
Source: National Statistics Institutes

2012-I	AL	AM	AZ	BG	GE	GR	MD	RO	RU	SRB	TR	UA	Total with BSEC	Total with World	BSEC /World %
AL				43,0		294,3		30,0	46,5		190,4		604,2	3.283,1	18,40%
AM				102,0	57,1	17,0		42,3	613,0		92,7	104,0	1.028,1	2.702,1	38,05%
AZ				426,2	347,4	320,3	2,2	43,5	1.035,5	16,3	1.025,1	314,0	3.530,5	17.171,8	20,56%
BG	57,0	7,2	26,3		290,2	2.487,0	41,5	2.803,7	4.585,6	582,5	2.506,0	812,6	14.199,6	40.512,2	35,05%
GE	0,2	140,0	605,8	170,2		23,0	7,6	115,0	214,5	0,5	741,2	341,0	2.359,0	4.865,9	48,48%
GR	597,0	3,5	56,5	243,1	17,1		20,0	865,5	4.006,5	270,2	2.401,2	206,2	8.686,8	61.322,0	14,17%
MD		1,0	2,2	47,8	9,4	30,0		464,0	718,0	6,6	212,0	331,0	1.822,0	3.502,3	52,02%
RO	44,0	1,7	365,0	285,0	206,2	784,5	753,7		2.660,7	950,0	3.989,2	1.244,7	11.284,7	94.931,3	11,89%
RU		556,1	1.374,5	2.241,6	195,1	2.993,6	999,6	1.718,6			16.639,9	22.342,4	49.061,4	406.834,5	12,06%
SRB				393,4		231,4		907,7	1.505,3		323,3	211,2	3.572,3	14.735,9	24,24%
TR	200,4		1.975,2	2.750,5	844,7	3.382,8	305,0	4.510,5	26.445,5	359,5		5.292,1	46.066,2	191.535,9	24,05%
UA	34,2	84,3	377,3	418,0		168,2	416,6	726,1	22.376,0	140,0	2.761,1		27.501,8	74.571,6	36,88%
<b>BSEC Region Total Foreign Trade</b>													<b>169.716,6</b>	<b>915.968,6</b>	<b>18,53%</b>

Table 5) Foreign Trade of the BSEC Countries in 2012-I (in million USD)  
Source: National Statistics Institutes

The following table shows different foreign trade indicators of the BSEC region in the period 2007-2012, and percentage changes between periods. For the first half year of 2012 compared with the first half year of 2011 the volume of trade has increased within the BSEC countries by 13,2 % and same tendency is seen in the total BSEC foreign trade as well by 10,4 %.

	2008	% change to previous period	2009	% change to previous period	2010	% change to previous period	2011-I	2012-I	% change to previous period
Foreign Trade Within BSEC	251,37	12,47	179,16	-28,73%	242,43	35,32%	149,89	169,72	13,2%
Total BSEC Foreign Trade	1.413,11	17,03	1.075,80	-23,87%	1.256,57	16,80%	829,62	915,97	10,4%
Within BSEC/Total BSEC	17,79%		16,65%		19,29%		18,07%	18,53%	

Table 6) Foreign trade of the BSEC region in 2007-2012.

### III. WAITING TIMES AT BSEC BORDERS

Using the IRU Border Waiting Times Observatory (BWTO) data, the BSEC-URTA International Secretariat analyzed the situation at the BSEC borders – internal and external – as available. This data is supplied to the IRU by its Member Associations. Analysis of the data for 2012-I is presented below.

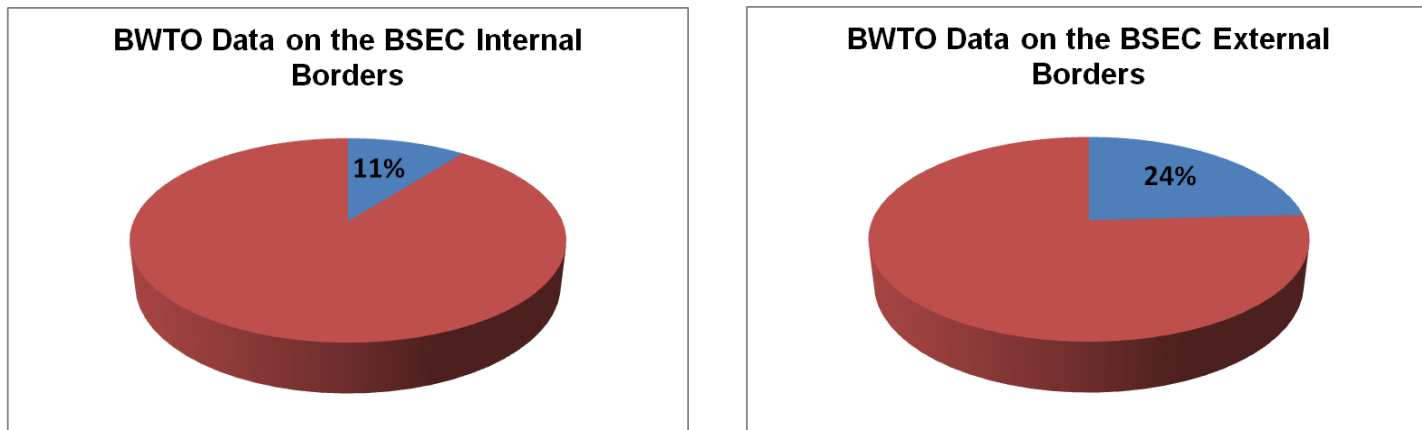


Fig. 4) BWTO Data on the BSEC Internal (2 out of 20) and External (7 out of 30) borders.

The data coverage of BSEC internal and external borders in 2012-I has decreased to percentages illustrated in Fig.4.

In average, waiting times at BSEC borders have decreased both at internal and external borders in 2011, with the average value of 109,6 minutes (see Fig.5).

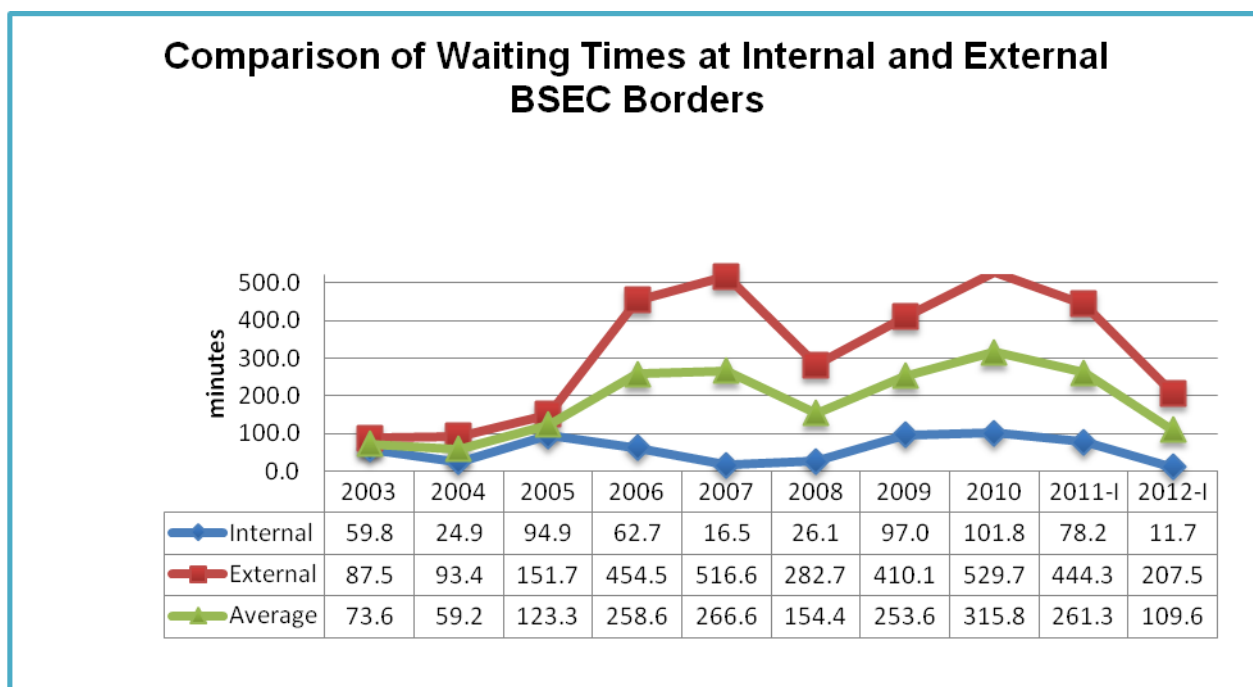


Fig. 5) Comparison of waiting times at Internal and External BSEC borders, and their average.

## SITUATION AT BSEC INTERNAL BORDERS

	2006	2007	% change to the prev. period	2008	% change to the prev. period	2009	% change to the prev. period	2010	% change to the previous period	2011-I	% change to the previous period	2012-I	% change to the previous period
BG-GR	120,0	0,0	-100,0%	0,0	0,0%	108,3							
BG-RO	28,7	0,3	-99,0%	21,0	7536,4%								
BG-SRB	115,3	18,0	-84,4%	38,0	111,1%	135,4	256,3%						
BG-TR	81,6	81,0	-0,8%	104,0	28,4%	121,2	16,6%	235,7	94,5%	211,7	-10,2%		
RO-SRB	15,0	8,5	-43,3%	8,0	-5,9%			32,2					
RO-UA	15,9	4,0	-74,8%	1,8	-55,5%	60,0	3270,8%	90,9	51,5%	10,2	-89%	9	-12,0%
RO-MD		4,0		1,9	-53,3%			4,0					
RUS-UA				34,0		60,0	76,5%	146,3	143,9%	12,7	-91,3%	14,4	13,4%
Average	62,7	16,5	-73,6%	26,1	57,7%	97,0	271,9%	101,8	5,0%	78,2	-23,2%	11,7	-85,0%

Table 7) Waiting times at Internal BSEC Borders (in minutes) and percentage change.

Table 7 and Figure 6 illustrate the situation at internal BSEC borders. Number of internal BSEC borders covered by BWTO is three; there is lack of data for Bulgarian borders with GR, RO, SRB and TR and for Romanian borders with SRB and MD in 2012-I.

In 2012-I, waiting times between RO-UA has decreased, while we can see increase between RUS-UA. Please note that data for BG-TR is not available for the first half of 2012.

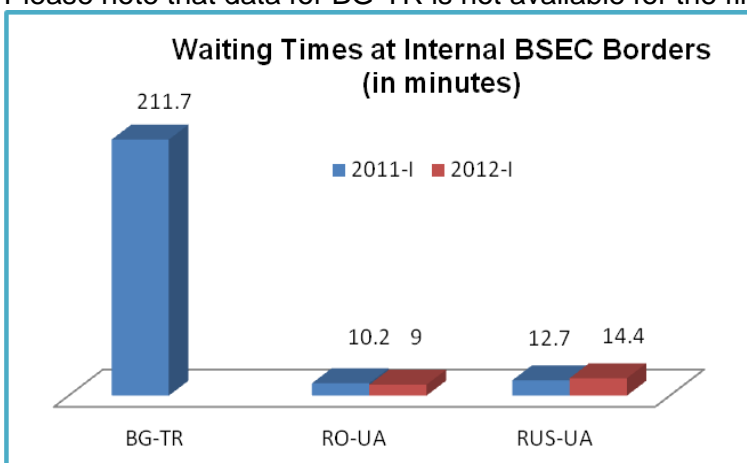


Fig. 6) Waiting times at Internal BSEC Borders

## SITUATION AT BSEC EXTERNAL BORDERS

	2007	2008	% change to the previous period	2009	% change to the previous period	2010	% change to the previous period	2011-I			% change to the previous period	2012-I			% change to the previous period
	average	average		average		average		average	in BSEC	out BSEC		average	in BSEC	out BSEC	
RUS-EST	2506,5	1212,4	-51,6%	1791,8	47,8%	1869,8	4,3%		1815,4	1815,4	-2,91%	-	-	-	
UA-BY		60,0		55,2	-8,0%	-		5	27,3	16,2		-	-	-	
UA-PL	382,1	671,8	75,8%	174,5	-74,0%	193,1	10,7%	112,7	115	113,9	-41%	133	70,5	101,7	-10,7%
UA-HUN	171,0	177,2	3,6%	95,9	-45,9%	46,0	-52,0%	212,7	246,5	229,6	400%	126,3	150,0	138,1	-40,0%
UA-SLO	600,0	269,1	-55,2%	180,7	-32,8%	189,4	4,8%	220,7	195,9	208,3	10%	57,6	86,3	72,0	-65,4%
RO-HUN	2,8	8,4	203,8%			-		-	-	-		-	-	-	
SRB-MKD	16,7	12,4	-25,5%			-		-	-	-		-	-	-	
GR-MKD	70,8	25,0	-64,6%			-		-	-	-		-	-	-	
BG-MKD	38,7	35,2	-9,1%	93,5	165,9%	-		-	-	-		-	-	-	
SRB-HUN	15,2	9,8	-35,2%	25,6	160,4%	-		-	-	-		3,7	13,0	8,3	
RUS-FI	768,3	493,1	-35,8%	680,0	37,9%	-		-	-	-		-	-	-	
RUS-BY	93,8	80,5	-14,2%			-		-	-	-		-	-	-	
RUS-LT	584,8	421,7	-27,9%	468,6	11,1%	321,3	-31,4%		266,4	266,4	-17%		230,3	230,3	-13,5%
RUS-LV	1758,8	394,9	-77,5%	615,3	55,8%	793,7	29,0%	271,3	1238,6	754,9	-4,9%	324,3	520,4	422,3	55%
RUS-PL	223,4	369,2	65,3%	329,7	-10,7%	294,6	-10,6%		150	150	-49,1%		480,0	480,0	220%
average	516,64	282,71	-45,3%	410,1	45,0%	529,7	30,0%	164,5	506,9	444,3	-16,1%	129,0	221,5	207,5	-53,3%

Table 8) Waiting times at External BSEC borders (in minutes)

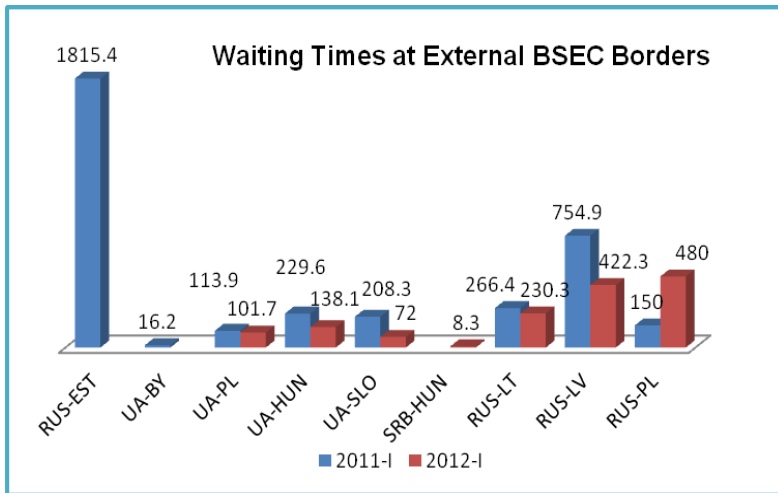


Figure 7) Waiting times at External BSEC Borders (in minutes)

Table 8 and Figures 7-9 illustrate the situation at external BSEC borders. There were no available data for RUS-EST, UA-BY, RO-HUN, SRB-MKD, GR-MKD, BG-MKD, RUS-FI, RUS-BY borders in 2012-I.

Average waiting time at external BSEC borders in 2011-I was 444,3 minutes, which decreased almost more than half percent in 2012-I to 207,5 minutes.

The decrease is also observed at internal BSEC borders as well by 21,5%.

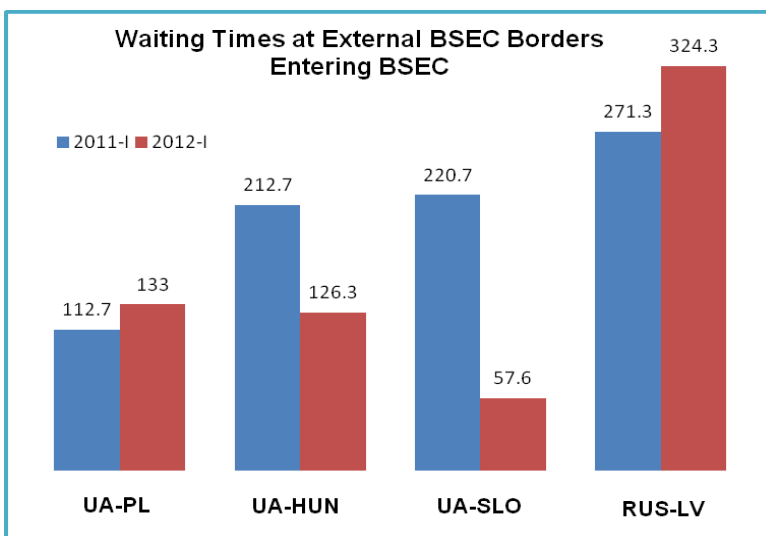


Fig. 8) Waiting times at External BSEC Borders – Entering BSEC

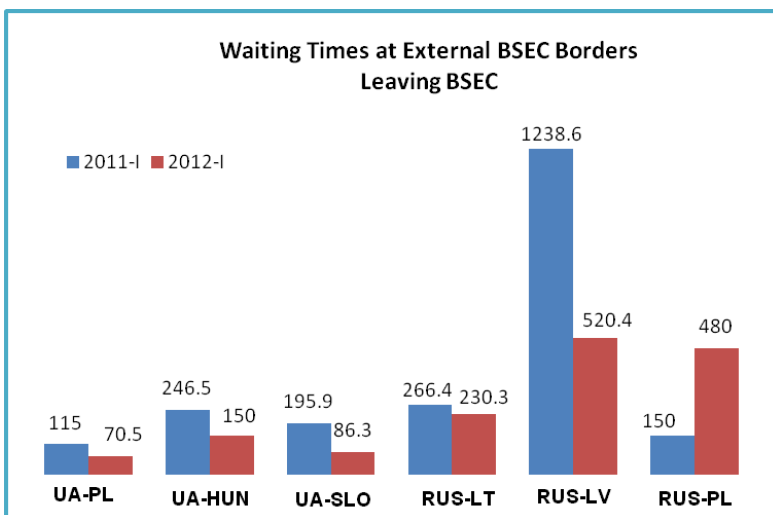


Fig. 9) Waiting times at External BSEC Borders – Leaving BSEC

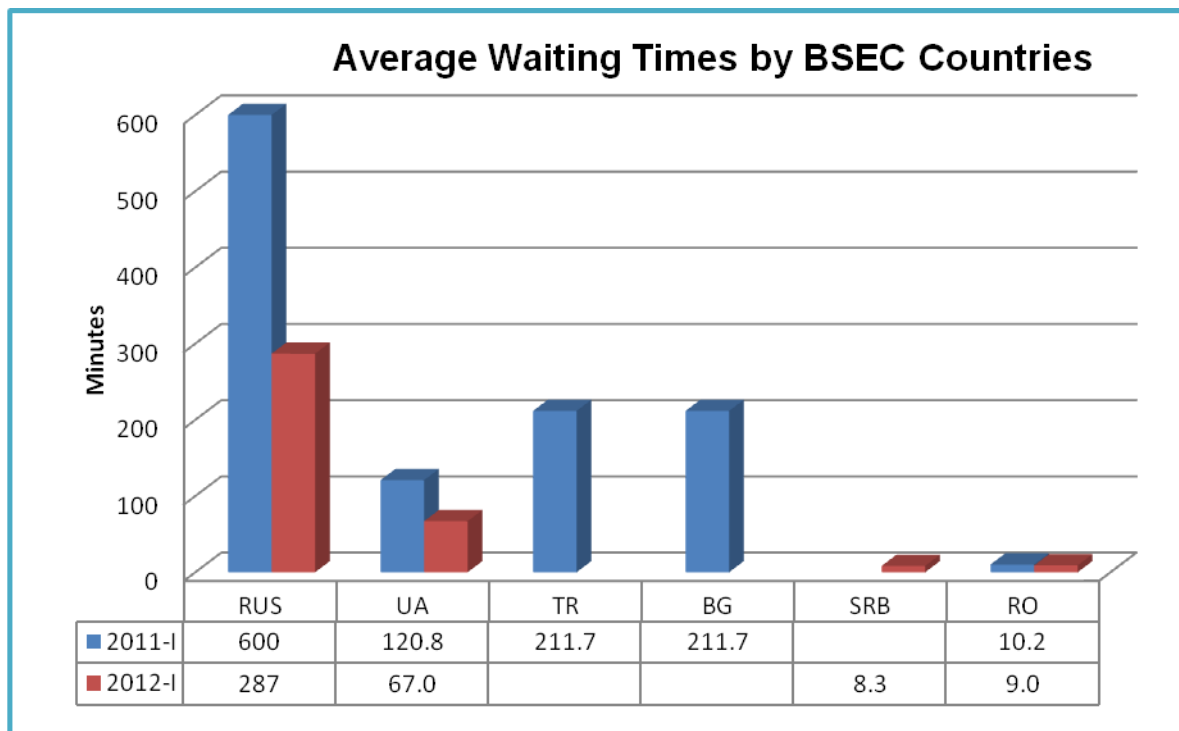


Fig. 10) Average waiting times by country.

Figure 10 shows the average waiting times at borders by country for 6 BSEC countries, whose borders are covered, partially, in the BWTO database, as of 2011-I and 2012-I.

### **CORRELATION ANALYSIS BETWEEN TRADE AND WAITING TIMES AT BORDERS IN THE BSEC REGION**

Based on the data presented in sections II and III of the current report, the BSEC-URTA International Secretariat made another analysis to check if there is a correlation between the change in foreign trade volume and the border waiting times in the BSEC region. Accordingly, an index was created based on available data for 2003, of which the results are given in the table below.

	2003	2004	2005	2006	2007	2008	2009	2010	2011-I	2012-I
<b>BSEC Trade</b>	100	139,9	175,9	220,3	289,7	325,8	232,3	314,2	192,3	220,0
<b>Internal Waiting Times</b>	100	41,7	158,8	104,8	27,6	43,6	162,3	170,3	130,9	19,5
<b>Non-BSEC Trade</b>	100	127,0	154,2	190,4	226,4	267,3	206,3	233,4	156,4	171,7
<b>External Waiting Times</b>	100	106,8	173,4	519,4	590,4	323,1	468,7	605,4	507,8	237,1
<b>Total BSEC Trade</b>	100	129,0	157,5	195,0	236,0	276,2	210,2	245,6	162,1	179,0
<b>Average Waiting Times</b>	100	80,4	167,5	351,1	362,0	210,0	344,4	429,0	355,0	49,0

Table 10) Correlation analysis between trade and waiting times at borders in the BSEC Region

In the Table 10, the Internal waiting times in the first semester of 2012 compared with 2011-I decreases nearly 7 times and the external waiting times decreased 2 times, the average waiting times in 2012-I compared with 2011-I being 7 times lower despite the increase of the trade both internal and external as well as in total of the BSEC region. These figures should indicate that things are running well at the borders. In fact the figures related to the waiting times at the borders show the lack of information from borders: we found available data for the first half of 2012 only for 2 out of 20 internal borders and 7 out 30 of external borders of the BSEC region.