

## SEVENTH MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

Royal Olympic Hotel, Athens- Greece  
Tuesday, 7 June 2005, at 10:00 hrs

### RESULTS OF THE SURVEY ON COMBINED TRANSPORTATION IN THE BSEC REGION

Starting from October 2004, the BSEC-URTA International Secretariat has convened a survey on combined transportation in the BSEC region among transport companies – users of services. It was suggested to express the opinion on performance of existing combined transportation services in the region by means of questionnaire form (see attached).

As of April 2005, the International Secretariat has received 114 answered forms from its Member Associations. Participation of countries in the present survey is reflected in the following table:

Country	No. of forms received	Remarks
Albania	2	
Armenia	n/a	
Azerbaijan	n/a	
Bulgaria	30	
Georgia	5	(5 without evaluation)
Greece	0	
Moldova	n/a	
Romania	37	(7 without evaluation)
Russia	2	
Turkey	32	(5 without evaluation)
Ukraine	6	

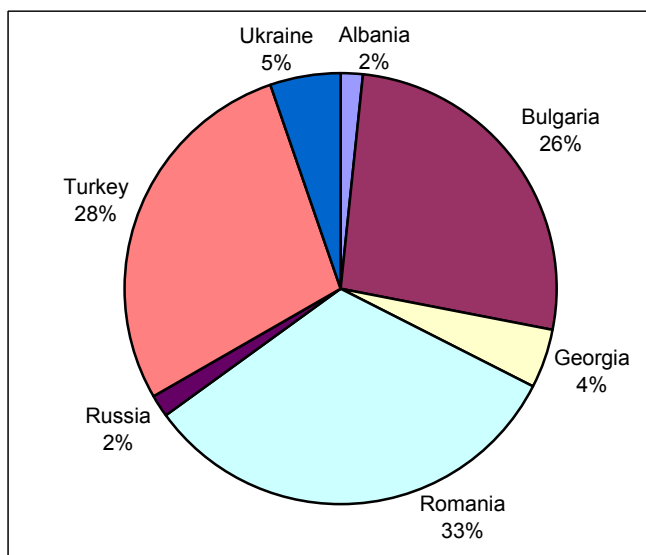
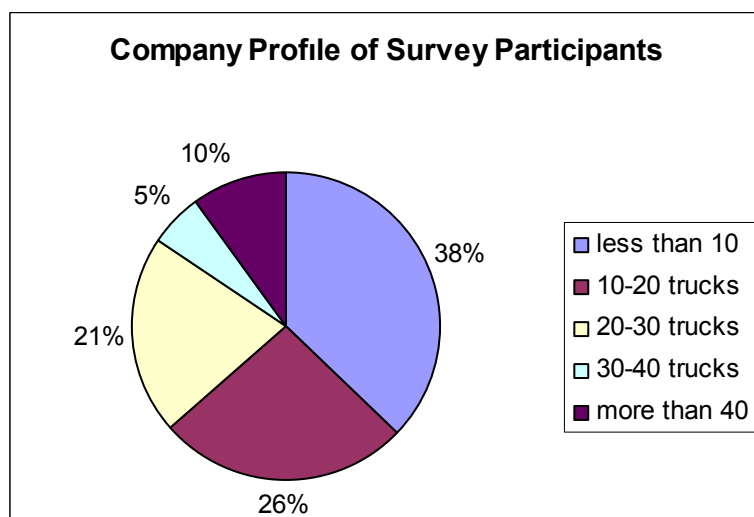


Fig. 1) Participation in the survey by country

Table 1) Number of forms received



Analysis of received forms showed that users of combined transportation services are mostly companies with small capacity up to 20 trucks (64%). Figure 2 shows the distribution of companies-users of services by their capacity.

Fig. 2) Participation in the survey by capacity of companies-users of Combined Transportation Services

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Other important result of the survey indicates the most common reason of use of combined transportation services: 44% of respondents use these services because of lack of transport permits, and 20% of respondents say that the reason of use is because it is the only way to reach the desired destination. Only 2% of respondents use services for security reasons.

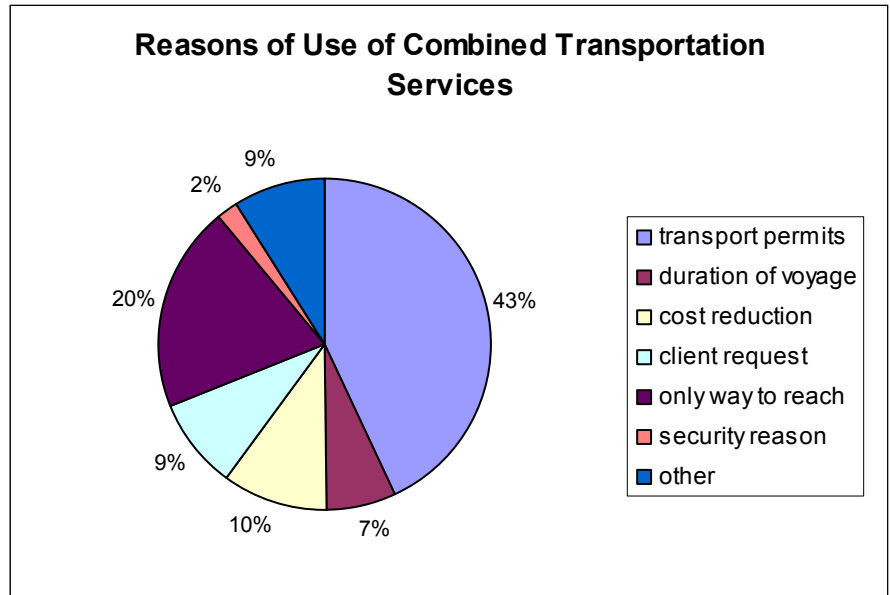


Fig.3) Reason of use of Combined Transportation Services

Below there are consolidated charts which indicate opinion of users on different points questioned:

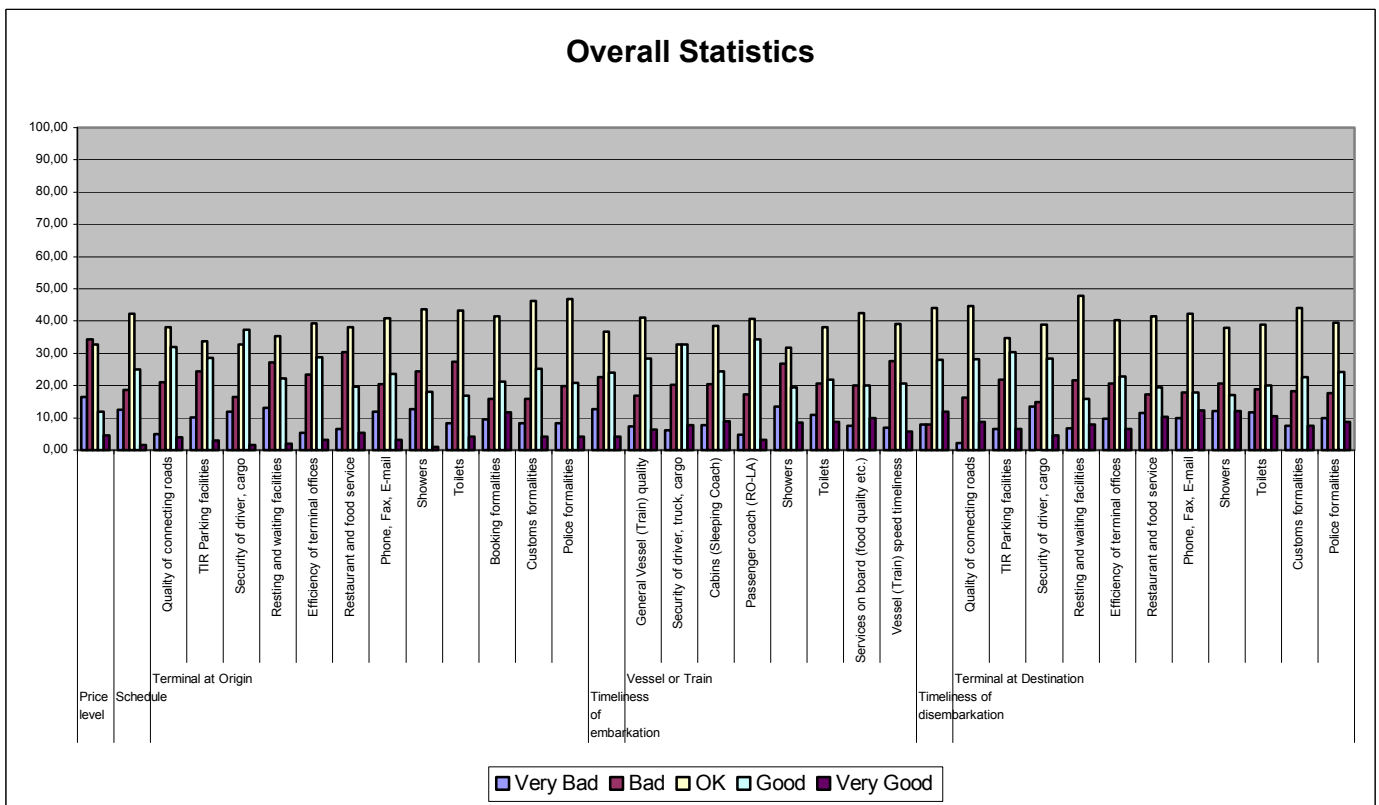


Fig.4) Results of the survey of all combined transportation services in BSEC region

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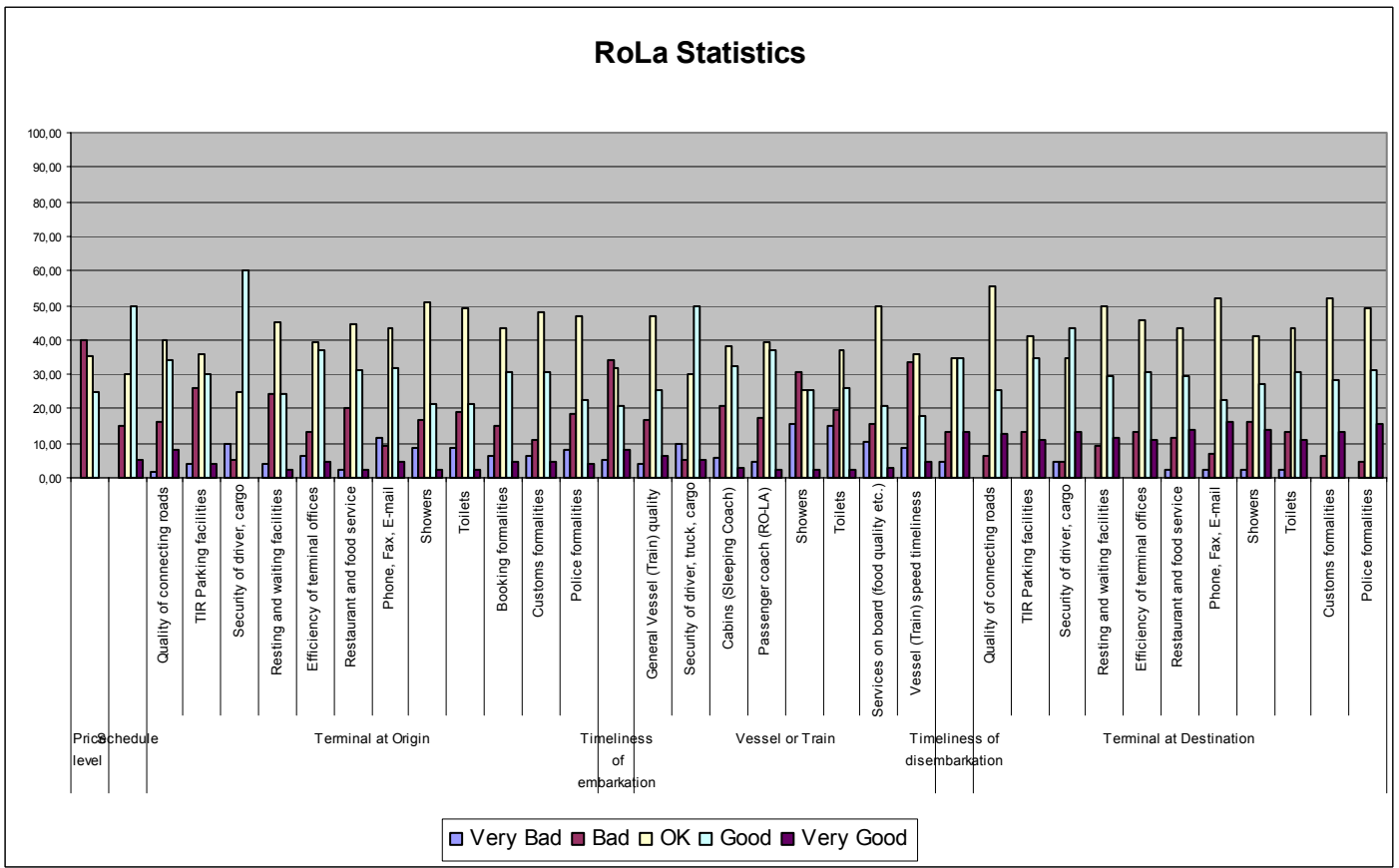


Fig. 5) Results of the survey of RoLa services in BSEC region

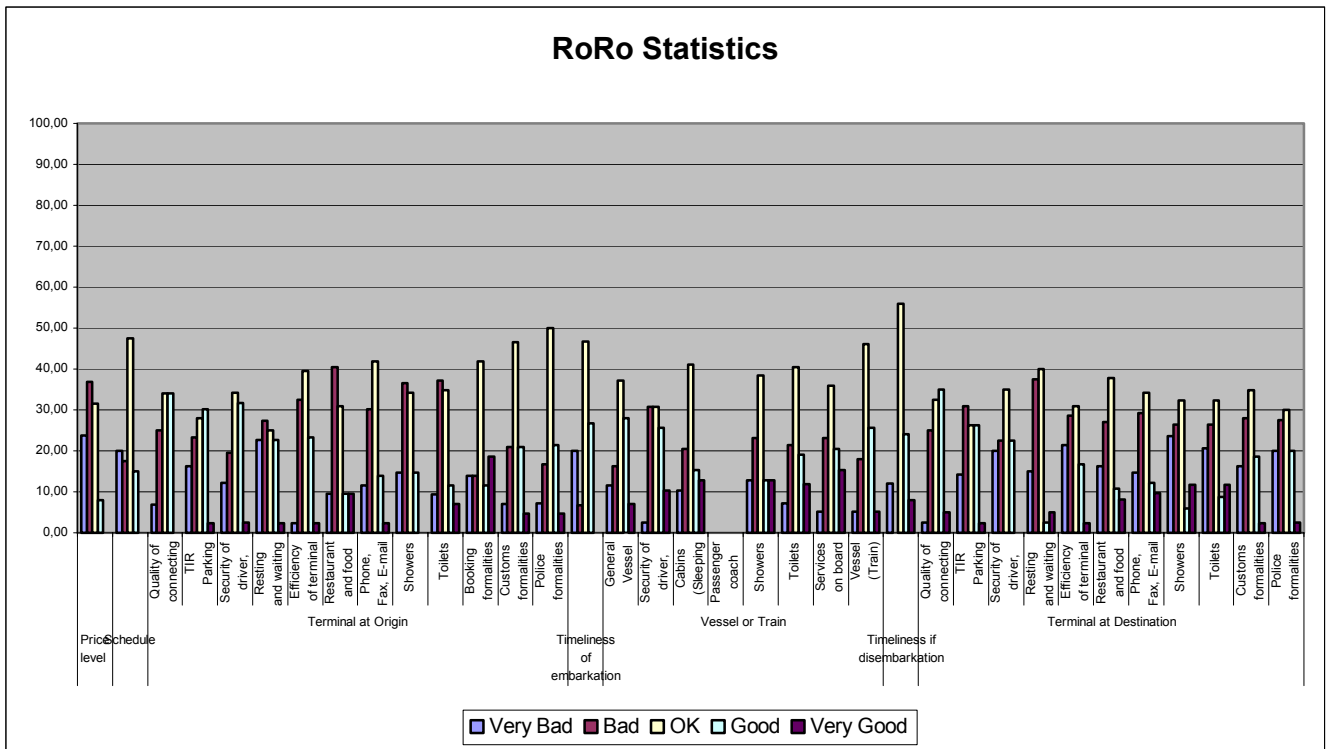


Fig. 6) Results of the survey of RoRo services in BSEC region

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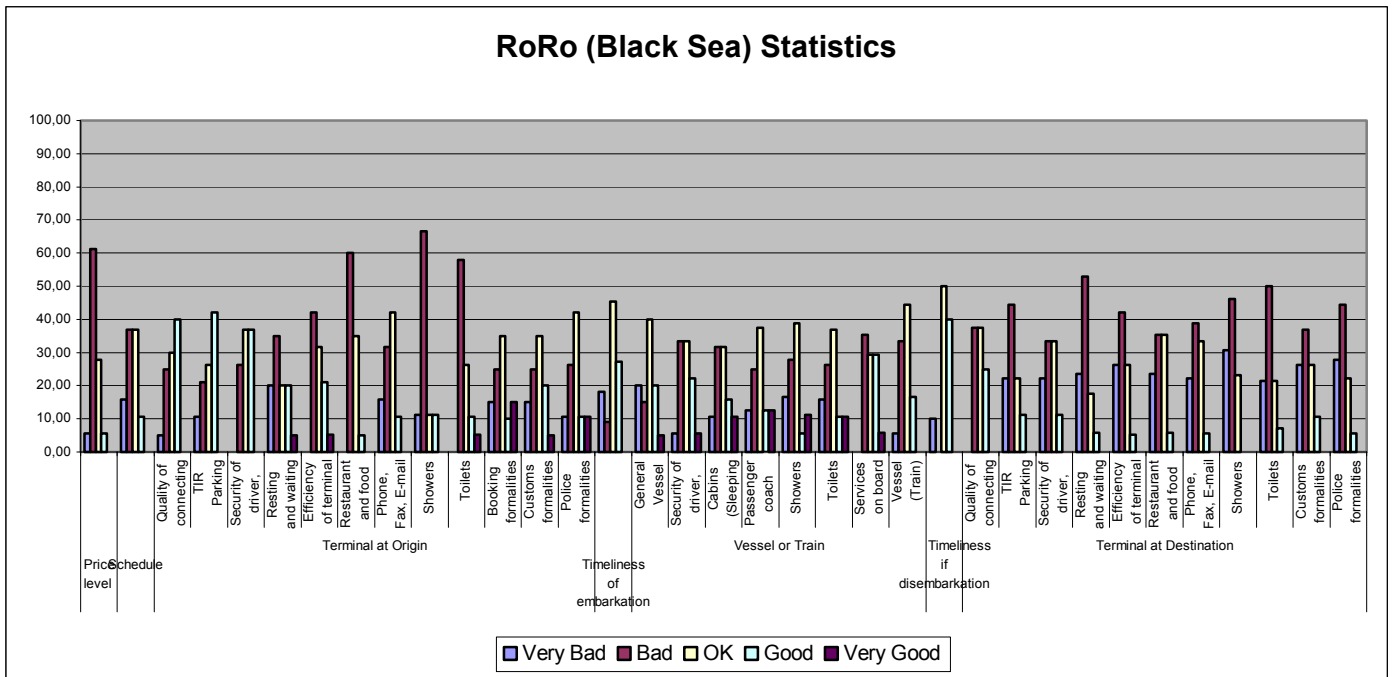


Fig.7) Results of the survey of RoRo services in Black Sea

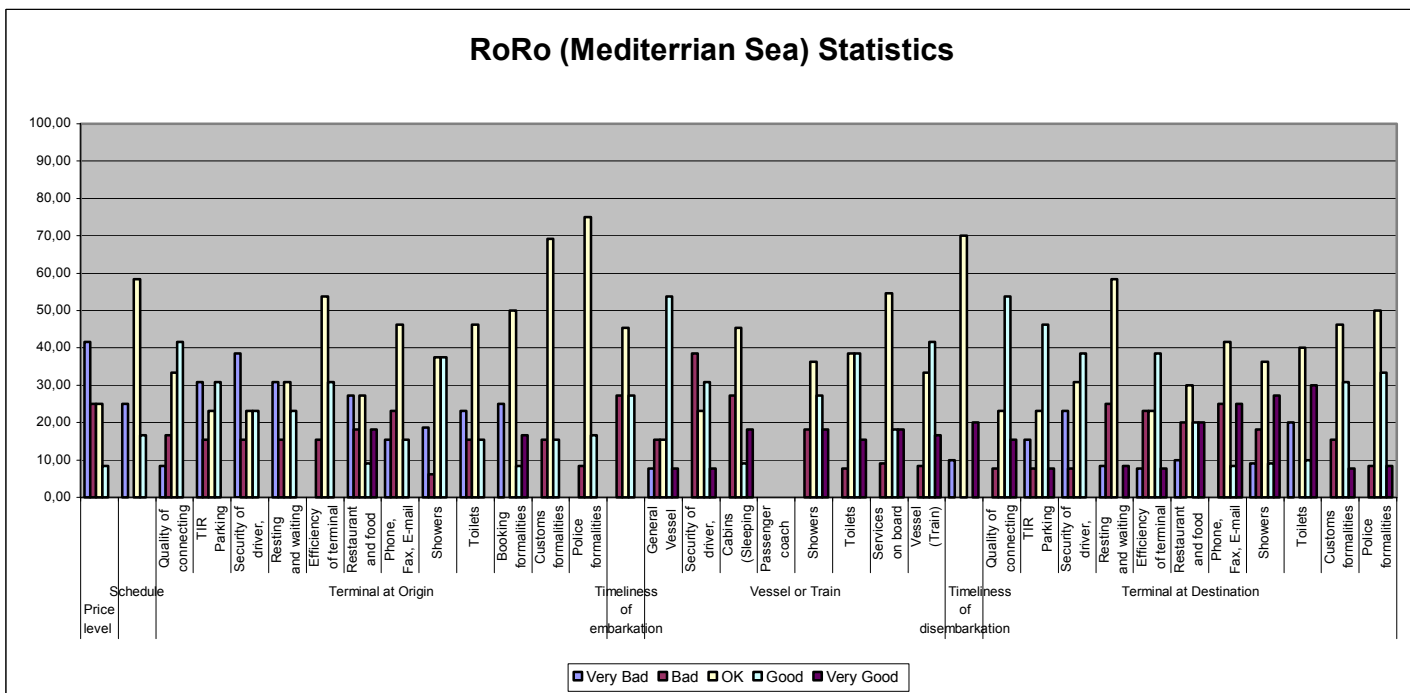


Fig.8) Results of the survey of RoRo services in Mediterranean Sea

## ANALYSIS OF DATA ON PERFORMANCE OF COMBINED TRANSPORTATION SERVICES IN BSEC REGION

Gathered forms were used to build a Database of existing performance of combined transportation services in BSEC region. Data was analysed to calculate the satisfaction level of services in general, and RoLa and RoRo services, in particular.

The following scoring was adopted while analysing the data:

Answer "Very Bad"	=	0% of satisfaction
Answer "Bad"	=	25% of satisfaction
Answer "OK"	=	50% of satisfaction
Answer "Good"	=	75% of satisfaction
Answer "Very Good"	=	100% of satisfaction

Accordingly, the following results were obtained:

### RO-LA SERVICES

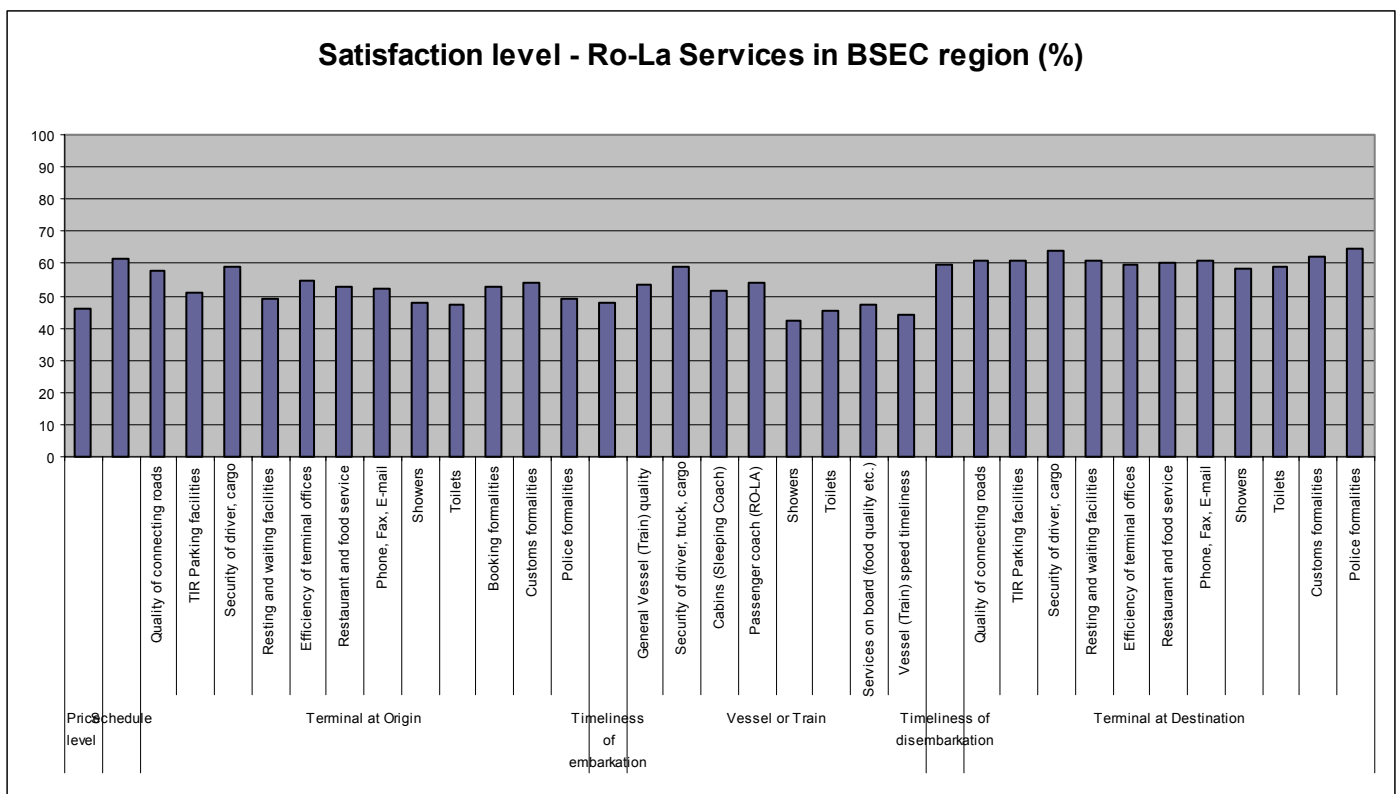
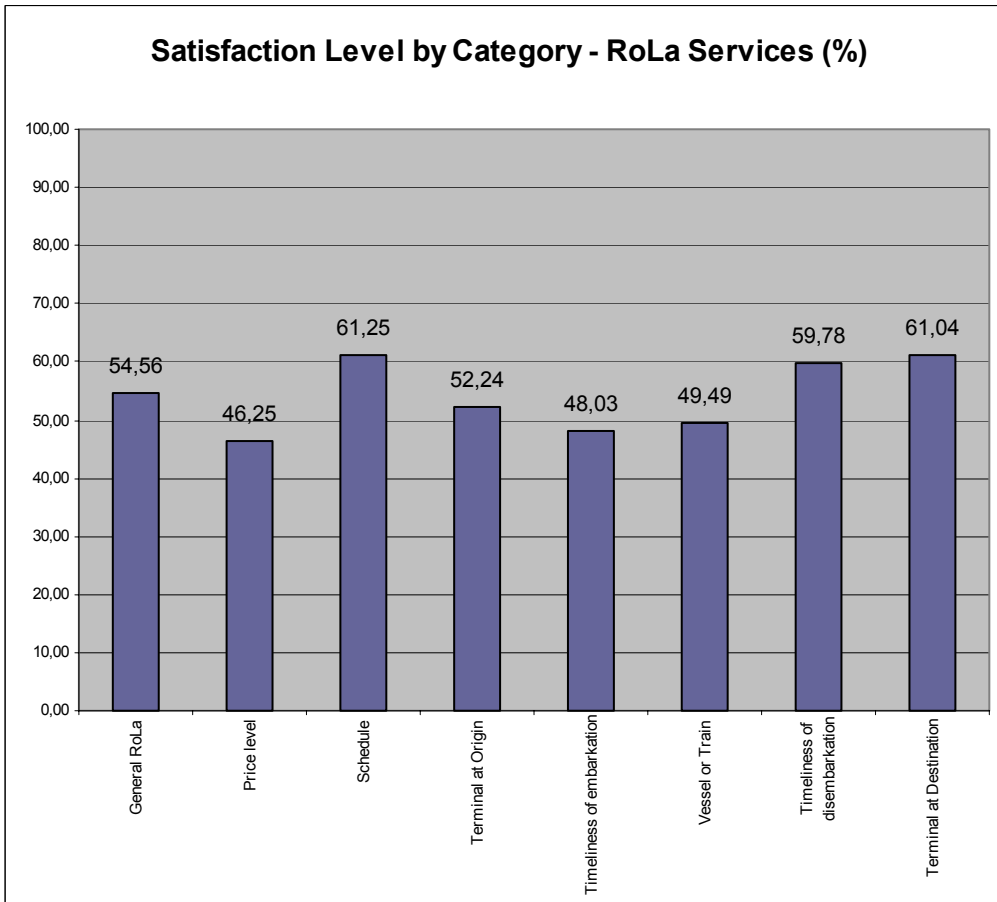


Fig.9) Satisfaction level of RoLa services in BSEC region

Five least satisfied points are:

- Showers (Train) **42,81%**
- Train speed timeliness **43,89%**
- Toilets (Train) **45,11%**
- Price level **46,25%**
- Toilets (Terminal/Origin) **47,34%**

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The general satisfaction level of RoLa services in BSEC region is **54,56%**.

Fig.10) Satisfaction level by category of RoLa services

**RORO SERVICES**

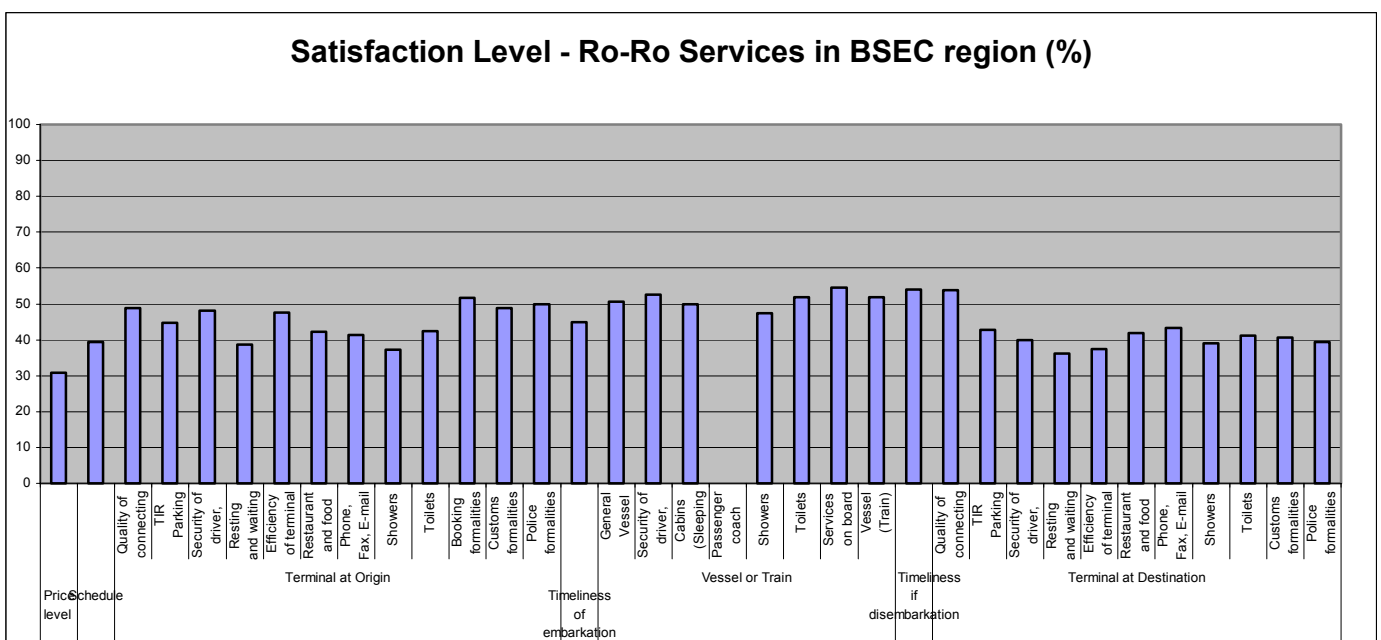
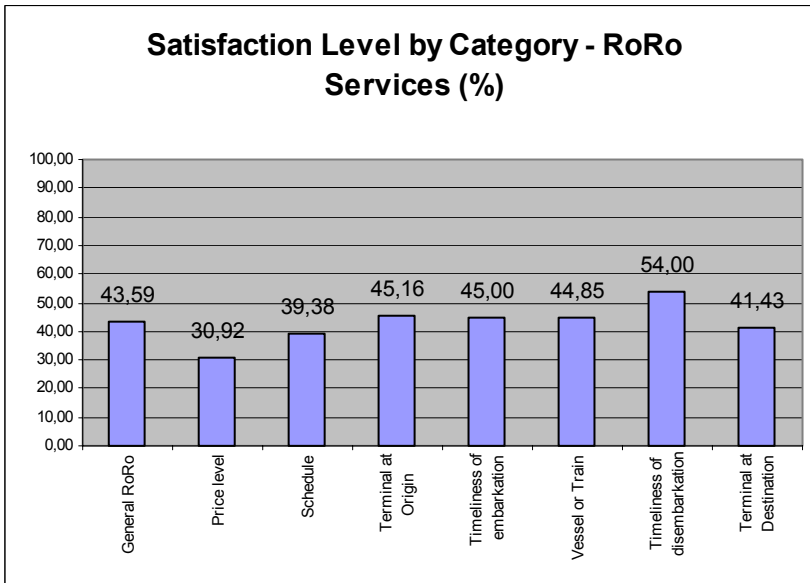


Fig.11) Satisfaction level of RoRo services in BSEC region

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Five least satisfied points are:

Price level	<b>30,92%</b>
Resting&waiting facilities (Terminal/Destination)	<b>36,25%</b>
Showers (Terminal/Origin)	<b>37,19%</b>
Efficiency of terminal offices (Terminal/Destination)	<b>37,50%</b>
Resting&waiting facilities (Terminal/Origin)	<b>38,64%</b>

The general satisfaction level of RoRo services in BSEC region is **43,59%**.

Fig.12) Satisfaction level by category of RoRo services

**RO-RO SERVICES IN BLACK SEA**

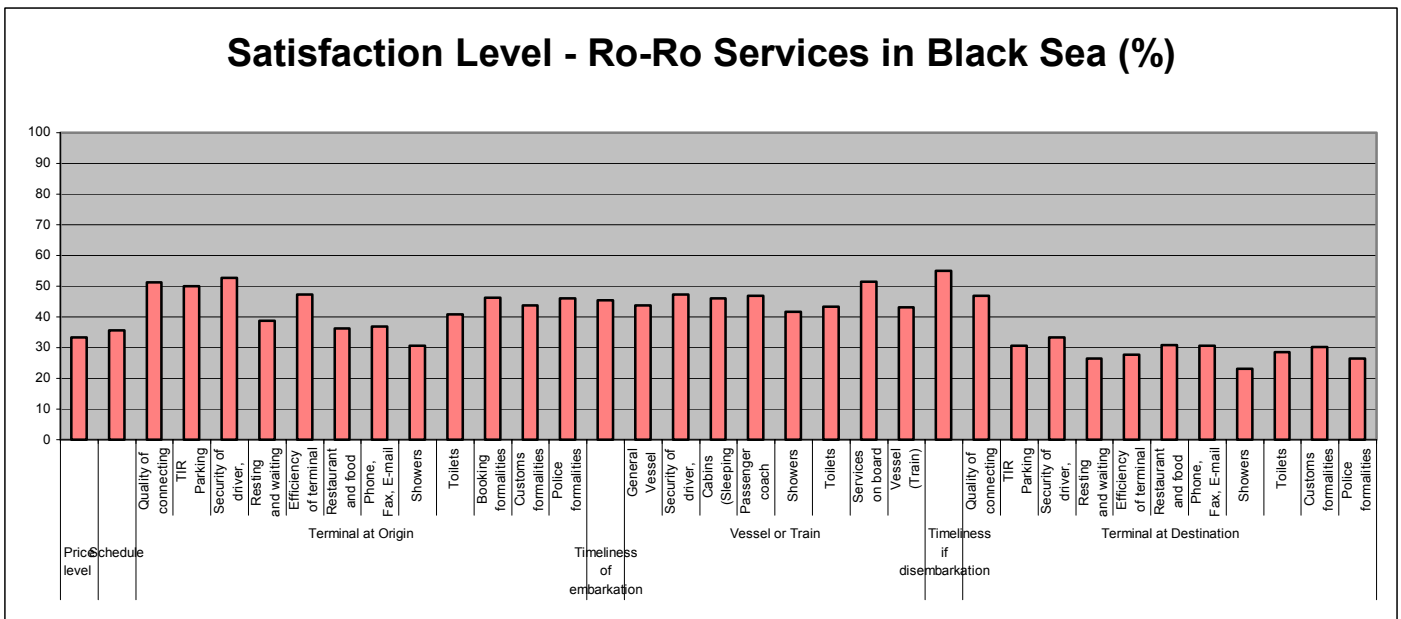
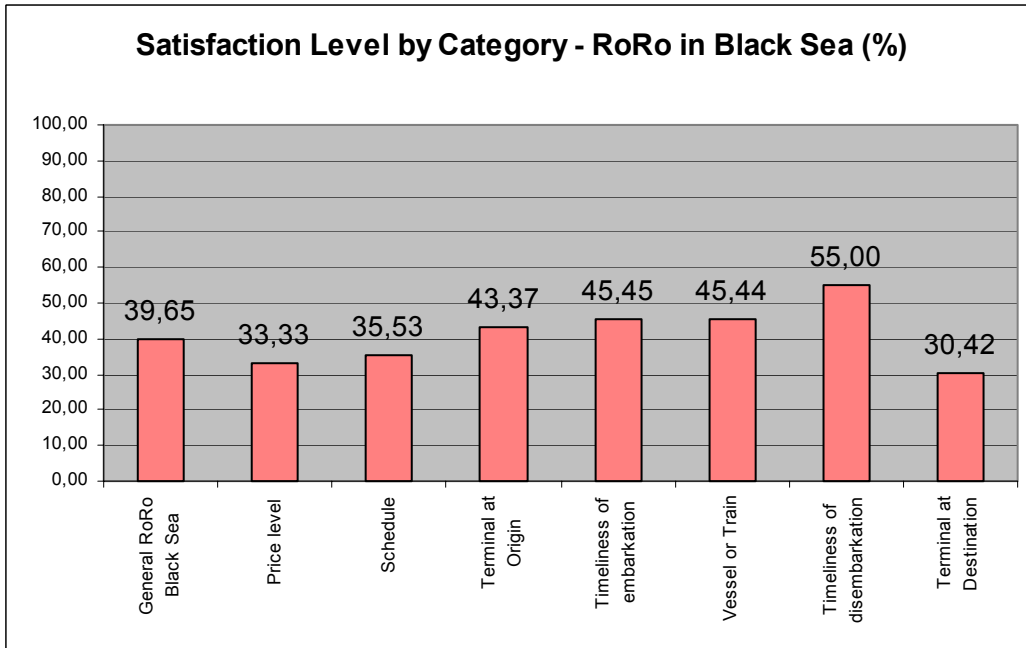


Fig.13) Satisfaction level of RoRo services in Black Sea

Five least satisfied points are:

Showers (Terminal/Destination)	<b>20,08%</b>
Police formalities (Terminal/Destination)	<b>26,39%</b>
Resting&waiting facilities (Terminal/Destination)	<b>26,47%</b>
Efficiency of terminal offices (Terminal/Destination)	<b>27,63%</b>
Toilets (Terminal/Destination)	<b>28,57%</b>

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The general satisfaction level of RoRo services in Black Sea is **39,65%**.

Fig.14) Satisfaction level by category of RoRo services in Black Sea

**RO-RO SERVICES IN MEDITERRANEAN SEA**

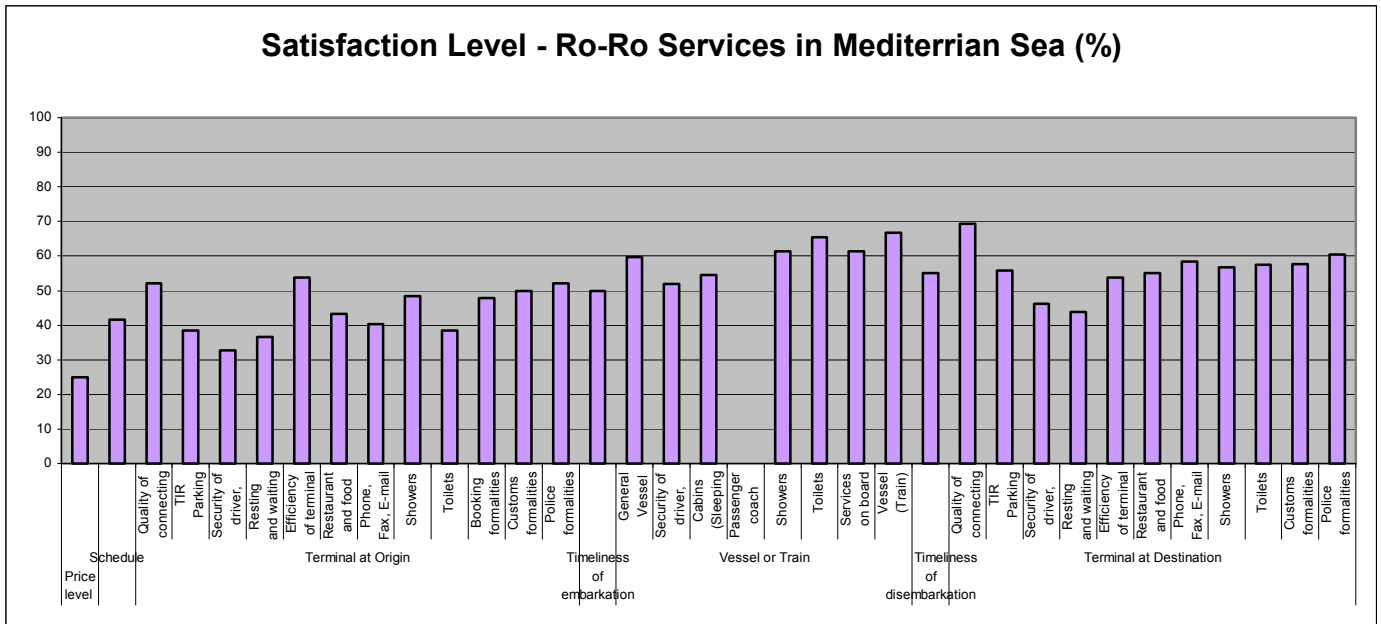
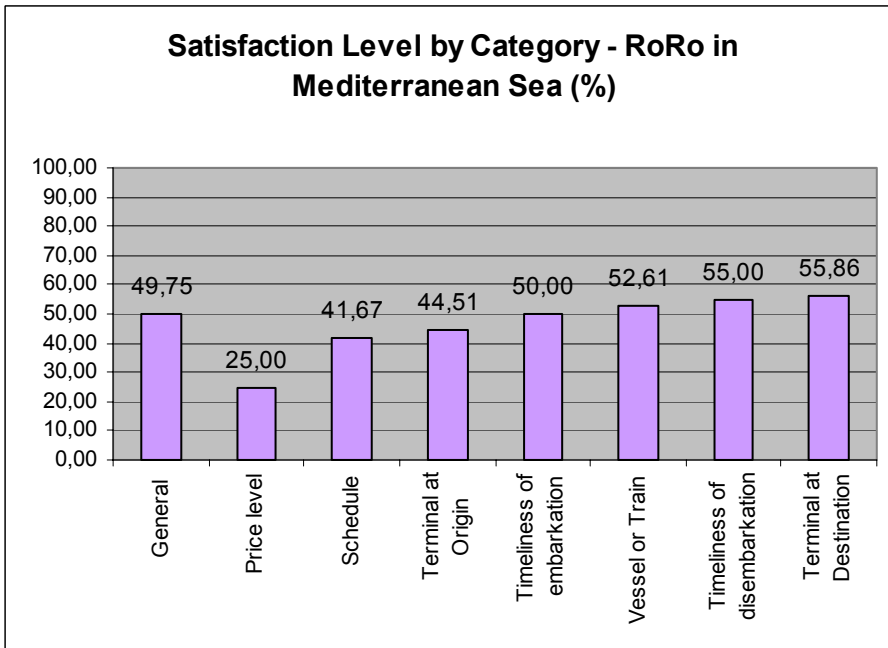


Fig.15) Satisfaction level of RoRo services in Mediterranean Sea

Five least satisfied points are:

Price level	<b>25,00%</b>
Security of driver, cargo (Terminal at origin)	<b>32,69%</b>
Resting&waiting facilities (Terminal at origin)	<b>36,54%</b>
Toilets (Terminal at origin)	<b>38,46%</b>
TIR Parking Facilities (Terminal at origin)	<b>38,46%</b>





The general satisfaction level of RoRo services in Mediterranean Sea is **49,75%**.

Fig.16) Satisfaction level by category of RoRo services in Mediterranean Sea

Based on the results presented above, it is observed that the satisfaction level of RoRo services in Black Sea is much lower in comparison with the correspondent level in Mediterranean Sea.

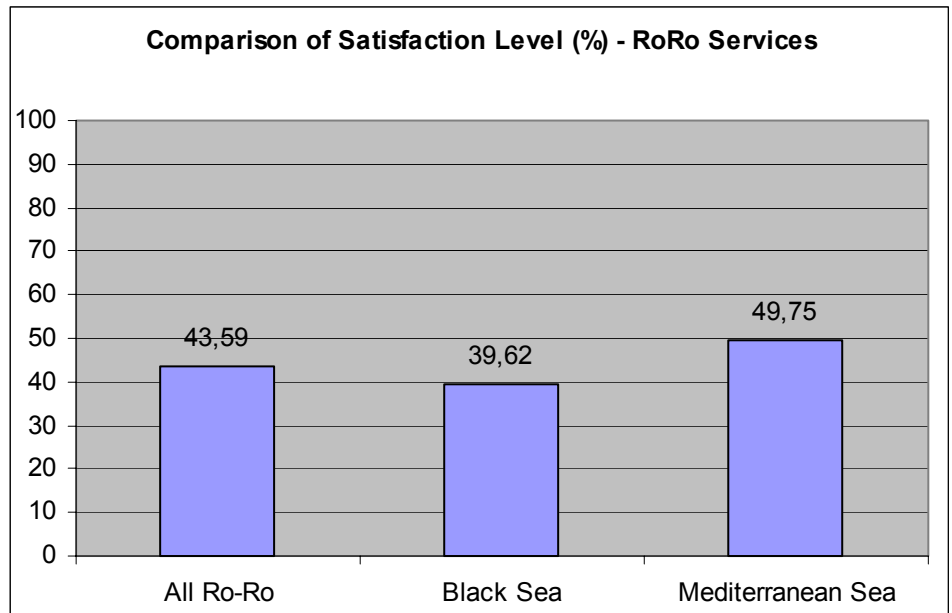
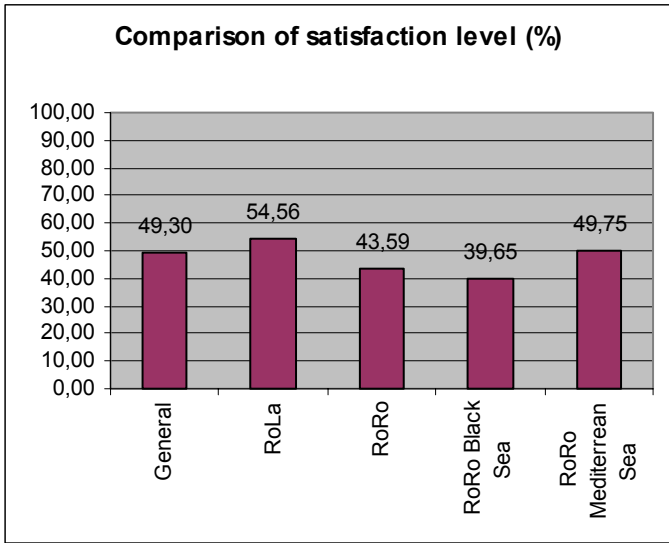


Fig. 17) Comparison of satisfaction level of RoRo services in Black and Mediterranean Seas

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The general satisfaction level of combined transport services in the BSEC region is observed to be **49,30%** in average.

Fig.18) Comparison of satisfaction level of combined transportation services in BSEC region

	General		RoLa		RoRo		RoRo Black Sea		RoRo Mediterranean Sea	
1	Price Level	38,43%	Showers (Train)	42,81%	Price Level	30,92%	Showers (Terminal/D)	20,08%	Price Level	25,00%
2	Showers (Terminal/O)	42,55%	Train Speed Timeliness	43,89%	Resting & Waiting Facilities (Terminal/D)	36,25%	Police Formalities (Terminal/D)	26,39%	Security of Driver, Cargo (Terminal/O)	32,69%
3	Resting & Waiting Facilities (Terminal/O)	43,18%	Toilets (Train)	45,11%	Showers (Terminal/O)	37,19%	Resting & Waiting Facilities (Terminal/D)	26,47%	Resting & Waiting Facilities (Terminal/O)	36,54%
4	Toilets (Terminal/O)	45,26%	Price Level	46,25%	Efficiency of Terminal Offices (Terminal/D)	37,50%	Efficiency of Terminal Offices (Terminal/D)	27,63%	Toilets (Terminal/O)	38,46%
5	Showers (Train)	45,73%	Toilets (Terminal/O)	47,34%	Resting & Waiting Facilities (Terminal/O)	38,64%	Toilets (Terminal/D)	28,57%	TIR Parking Facilities (Terminal/O)	38,46%

Table 2) Lowest Satisfaction Level by Top 5 Least Satisfied Parameters

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