

SEVENTH MEETING OF THE BSEC-URTA GENERAL ASSEMBLY

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

BSEC OUTLOOK 2004: BSEC-URTA INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE REPORT

Collecting statistical data and analyzing 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 2004 in comparison with 2003.

I. INTERNATIONAL ROAD TRANSPORT INDUSTRY PERFORMANCE IN THE BSEC REGION IN 2004

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

	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	EU**	Others
AL			3	410		30624	4	16		473	506		41840	34
AR														
AZ				11	122	2		24	2302		26	560	362	
B *	1831	102	34		139	76299	1188	13710	4317	15006	47888	640	11400	40343
GEO		1360	781	345		390	3	12	2131		3043	445	3000	50
GR														
MD	53	23	6	2325	37	2850		8481	19862		4941	2875	17044	4148
RO	82	1	8	2294	10	6468	2549		60	1253	2968	119	123408	
RUS *	12	1669	6679	7718	5862	2465	13834	2222		2222	12869	106693	905555	202820
TR	3102		8784	10940	13403	20981	1218	25694	12786	5412		1820	166339	563356
UA	1	146	1790	375	182	320	3796	969	65154	706	601		70311	5760

Table 1.) Road transport operations in BSEC region in 2004

(*) assuming 20 tons per truck

(**) excluding Greece

Note: data for Russia refers to the number of trips made from Russia by hauliers from all countries.

Figure 1 shows the total international trips in the BSEC region in three categories: trips within the BSEC region, trips to the EU except Greece, trips to the rest of the world.

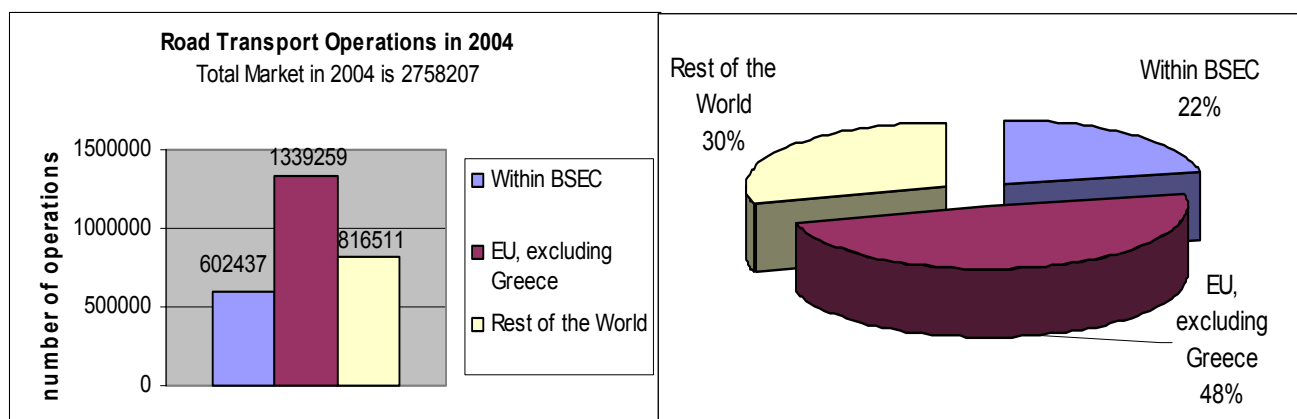


Fig. 1) International road transport trips by the BSEC hauliers in 2004.

**UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION
(BSEC-URTA)**

II. FOREIGN TRADE PERFORMANCE OF THE BSEC REGION

Based on reports of the WTO, ECMT and National Statistics Institutes, the regional foreign trade performance in 2003 and in 2004 (as available) is presented in tables below.

	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	BSEC Total	World Total *	BSEC/World (%)
AL			0,03	33,1	0,01	405,3	0,6	21,1	46	25,2	130	22,1	683,4	2.317,0	29,49 %
AR				22,9	55,4	28	2,6	0,5	206,2	1,1		53,1	369,8	1.947,0	18,99 %
AZ				7,4	103,5	46,7	1,1	40,7	532,3	3,6	458,5	113,4	1.307,2	5.218,0	25,05 %
B	30,2	23,7			72,5	1485	26,9	487	1453	282,5	1337	401	5.598,8	18.202,0	30,76 %
GEO	0	53	110	19		15	1	11	243	1	195	111	759,0	1.606,0	47,26 %
GR	371	26	49	1243	123		26	787	3015	335	1392	308	7.675,0	57.342,0	13,38 %
MD	0,5	2,4	1	36,3	1,2	192		188,4	491,5	2,3	55,5	365,5	1.336,6	2.190,0	61,03 %
RO	26		7	465	18	749	174		1461	167	1748	431	5.246,0	41.622,0	12,60 %
RUS	43	201	500	772	235	1068	702	1348		446	5670	11900	22.885,0	208.608,0	10,97 %
SCG	25	-	-	304	1	349	2,1	176	-		223		1.080,1	10.602,4	10,19 %
TR	119		438	1311	429	1348	58	1829	6819	215		1777	14.343,0	115.916,0	12,37 %
UA	23	51	139	375	106	291	343	458	12255	129	1699		15.869,0	46.101,0	34,42 %
BSEC Region Total Foreign Trade													77.152,94	511.671,4	15,08 %

Table 2.) Foreign Trade of BSEC Countries in 2003 (in million USD)

Source: ECMT
(* Source: WTO)

	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	SCG	TR	UA	BSEC Total	World Total	BSEC/World (%)
AL				52,3		535		11,3		39,9	176,0		814,49	2.901,5	28,07 %
AR														2066 *	
AZ														3.515,9	
B	40,2					1066,6		816,6	1944	396,1	1855,2	658,3	6777,283	24.276,1	27,92 %
GEO														2496 *	
GR														67.842 *	
MD								263,4	569,7		81,7	501,2	1416	2.760,5	51,29 %
RO														51135,5	
RUS		208,4	757,1		336,7	1429,2	868,6				8673,1	16868	29140,8	257.122,0	11,33 %
SCG														15.731,4	
TR													22146,76	160.660,7	13,78 %
UA	53,7	78,89	224,5	579,8	165,9	172,3	727	815,4	17700	278,4	2237,6		23034,03	61.687,7	37,34 %
BSEC Region Total Foreign Trade													652.195,4		

Table 3.) Foreign Trade of the BSEC Countries in 2004 (in million USD) (as available)

Source: National Statistics Institutes
(* Source: WTO)

The value of foreign trade within the BSEC region in 2004 was not available at the time when this report was being prepared. However, for purposes of this report, this data was estimated by assuming that the average rate of change in the national foreign trade of Albania, Bulgaria, Moldova, Russia, Turkey and Ukraine in 2004, which is 37,2% in comparison with 2003, is applied to the whole region.

	2003	2004	%
Foreign Trade Within BSEC	77,15	** 105,88	37,2
Total BSEC Foreign Trade	511,67	652,19	27,5
World Foreign Trade*	7.546,22	9.123,51	20,9
BSEC/World Foreign Trade	6,66%	7,02%	5,4

Table 4.) Performance of foreign trade volume in the BSEC region in 2003-2004

(* Source: WTO
(**) Estimated value

III. WAITING TIMES AT BSEC BORDERS

Using the IRU's Border Waiting Times Observatory (BWTO) data, the BSEC-URTA International Secretariat analyzed the data related with the BSEC borders – internal and external – as available. This data is supplied to the IRU by its Member Associations.

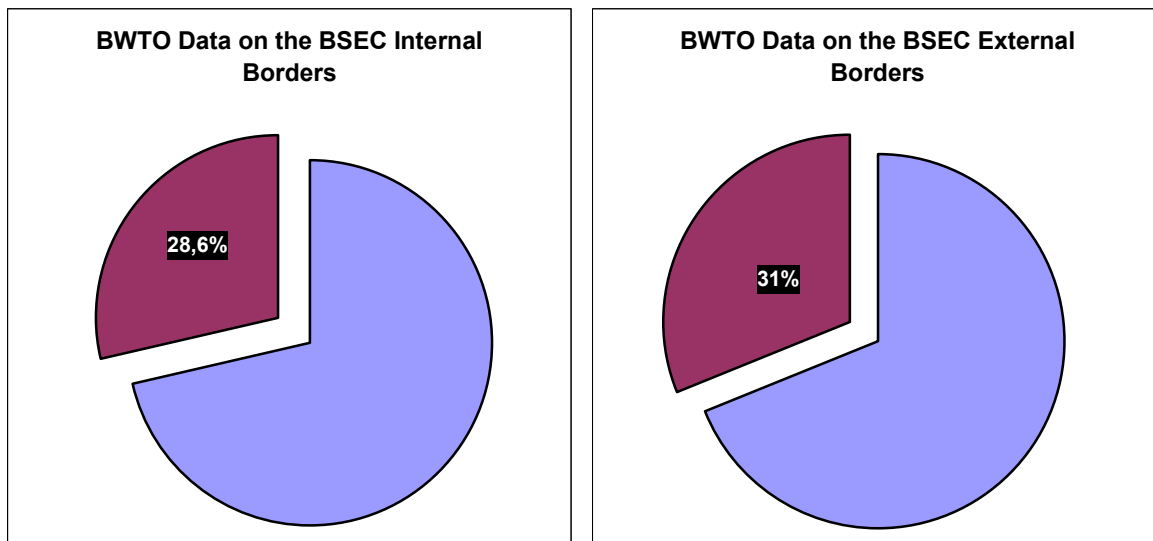


Fig. 2.) BWTO Data on the BSEC Internal (6 out of 21) and External (9 out of 29) borders.

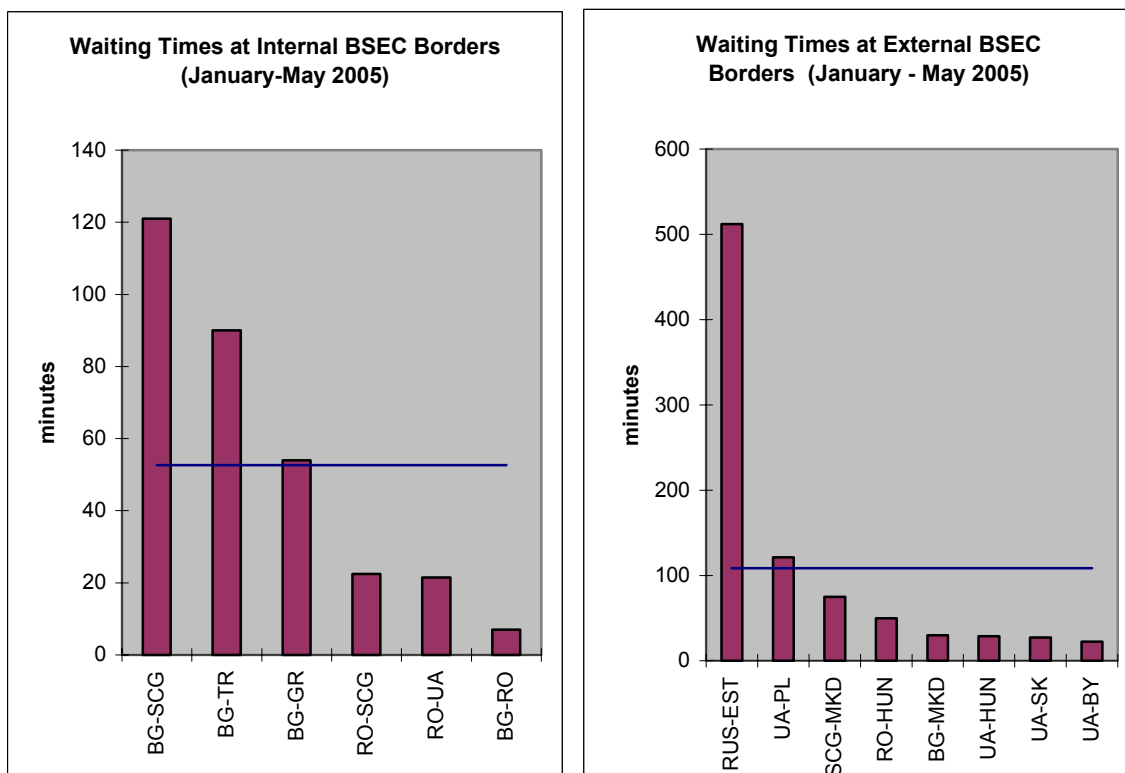


Fig. 3.) Waiting times at Internal and External BSEC borders (average of the period of January-May 2005). Horizontal line represents the average waiting time, in general.

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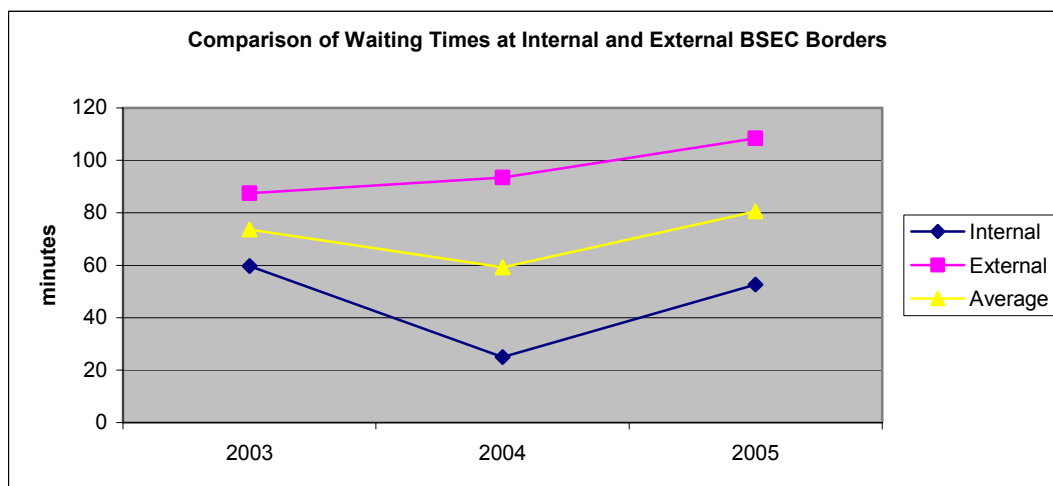


Fig. 4.) Comparison of waiting times at Internal and External BSEC borders, and their average.

Situation at BSEC Internal Borders

	2003	2004	2005
BG-GR	67	56,5	54
BG-RO	52	14	7
BG-SCG	90	7	121
BG-TR	30	35	90
RO-SCG		20	22,5
RO-UA		17	21,5
Average	59,75	24,9	52,7

Table 5.) Waiting times at Internal BSEC Borders (in minutes).

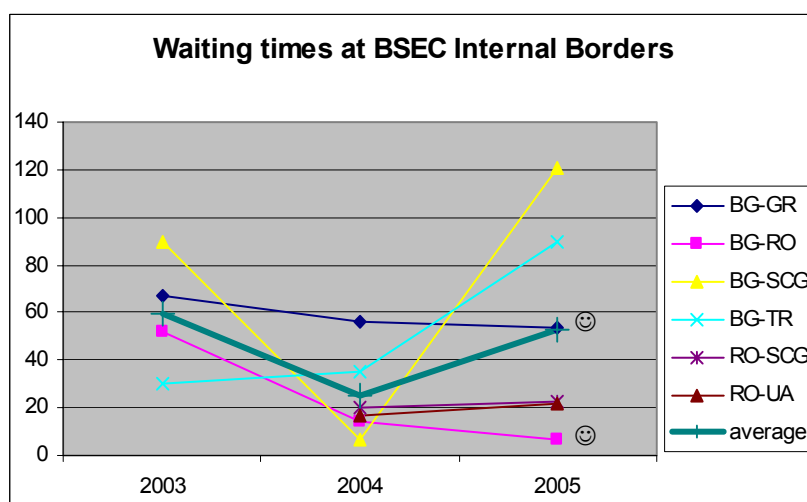


Fig. 5.) Waiting times at Internal BSEC borders. Decreasing time is observed at BG-RO and BG-GR borders.

Situation at BSEC External borders

	2003			2004			2005		
	Entering BSEC	Leaving BSEC	Average	Entering BSEC	Leaving BSEC	Average	Entering BSEC	Leaving BSEC	Average
RUS-EST	n/a	n/a	n/a	241	0	241	512	0	512
UA-BY	n/a	n/a	n/a	30	25	27,5	15	30	22,5
UA-PL	60	n/a	60	264	130	197	130	113	121,5
UA-HUN	n/a	n/a	n/a	180	15	97,5	38	20	29
UA-SK	300	45	172,5	93	38	65,5	27	28	27,5
RO-HUN	105	110	107,5	52	66	59	60	40	50
SCG-MKD	n/a	n/a	n/a	60	60	60	90	60	75
GR-MKD	n/a	n/a	n/a	60	67	63,5	n/a	n/a	n/a
BG-MKD	10	10	10	30	30	30	30	n/a	30
Average	118,7	55	87,5	112,2	47,9	93,4	112,7	41,6	108,4

Table 6.) Waiting times at External BSEC Borders (in minutes).

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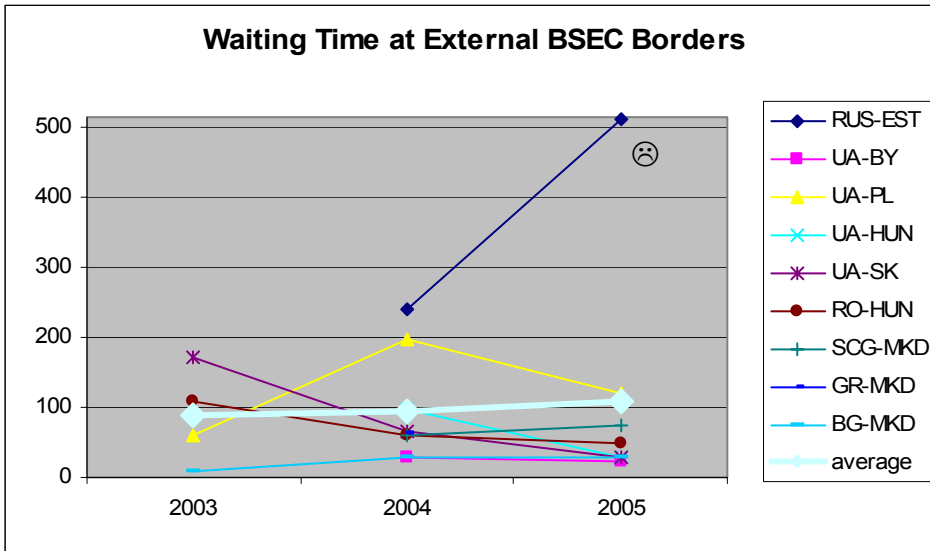


Fig. 5.) Waiting times at External BSEC borders. Situation at the RUS-EST border is observed to be critical.

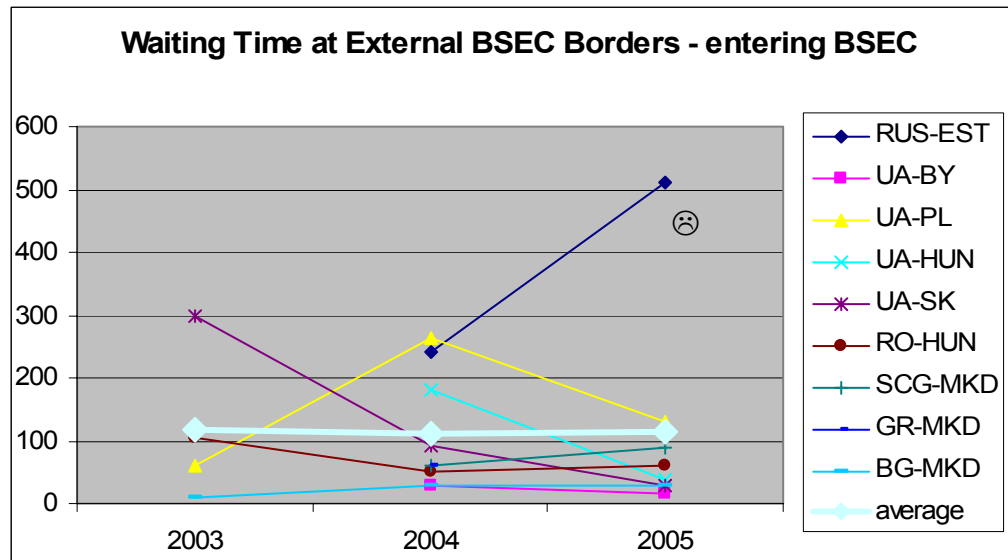


Fig. 7.) Waiting times at External BSEC borders – entering BSEC. Situation at the RUS-EST border is observed to be critical.

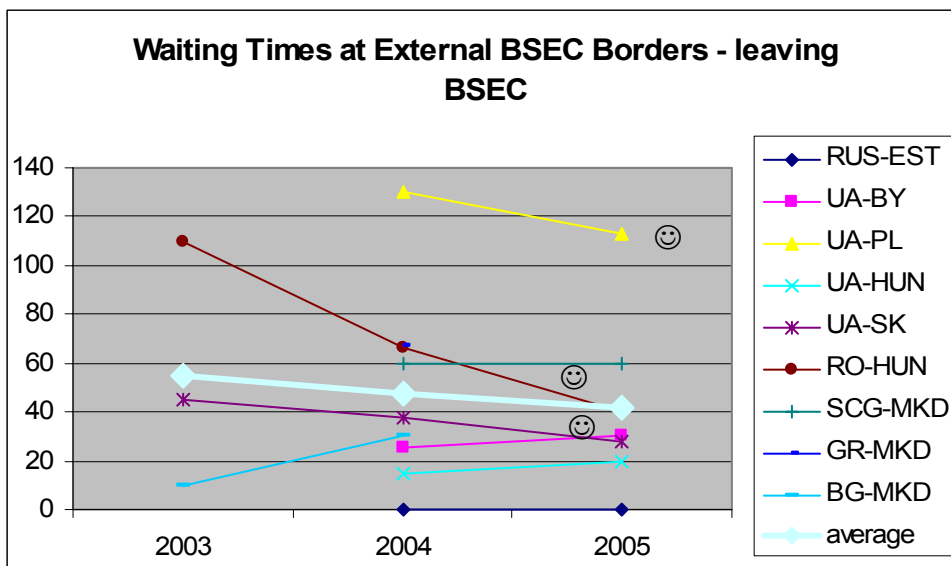


Fig. 8.) Waiting times at External BSEC borders – leaving BSEC. Shorter waiting time is observed at the UA-PL, RO-HUN and UA-SK borders.

IV. CORRELATION ANALYSIS BETWEEN TRADE AND WAITING TIMES AT BORDERS IN THE BSEC REGION

Based on data presented in section 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
BSEC Trade	100	137,2
Internal Waiting Times	100	41,7
Non-BSEC Trade	100	125,7
External Waiting Times	100	106,8
Total BSEC Trade	100	127,5
Average Waiting Times	100	80,4

Table 7.) Correlation Analysis between Foreign Trade & Border Waiting Times in the BSEC region.

V. PARTICIPATION OF BSEC COUNTRIES IN UNECE TRANSPORT AGREEMENTS AND CONVENTIONS

BSEC-URTA International Secretariat has prepared a consolidated table indicating participation of BSEC Member States in various UNECE transport agreement and conventions, as of 7 April 2005. Results are presented below:

**UNION OF ROAD TRANSPORT ASSOCIATIONS IN THE BLACK SEA ECONOMIC COOPERATION REGION
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	INTERNATIONAL CONVENTIONS	AL	AR	AZ	B	GE	GR	MD	RO	RU	SCG	TR	UA
	Number of newly ratified conventions	2	1	1									
1	Construct. Traffic Arteries 1950				X		X		X		X	X	
2	E Road Network (AGR), 1975			X	X	X	X		X	X	X	X	X
3	E Comb. Tr. Network (AGTC)1991				X	X	X	X	X	X	X	X	
4	Road Traffic, 1949	X			X	X	X		X	X	X	X	
5	Road Traffic, 1968	X	X*	X*	X	X	X	X	X	X	X		X
6	Prot. Road Signs & Signals, 1949				X		X		X	X	X		
7	Road Signs & Signals, 1968	X*			X	X	X		X	X	X		X
8	Suppl. 1968 Conv. R. Traffic, 1971				X		X		X	X	X		X
9	Sup.1968 Conv. Signs & S, 1971				X	X	X		X	X	X		X
10	Weights and Dimensions, 1950						X				X		
11	Suppl. 1949 Conv. and Prot.1950						X				X		
12	Road Markings, 1957	X*			X				X		X	X	
13	Protocol Road Markings, 1973				X	X	X			X	X		X
14	Issue Valid. Driving Permits-APC				X						X		
15	Vehicles Regulations, 1958			X	X		X		X	X	X	X	X
16	Techn. Inspect. Vehicles, 1997					X	X		X	X			X
17	Global Vehicles Regulations 1998			X	X				X	X		X	
18	Work Crews Road Tr(AETR) 1970			X	X		X	X	X	X	X	X	
19	Tax. Road Goods. Vehic. , 1956										X		
20	Contract R Goods Tr.(CMR) ,1956				X	X	X	X	X	X	X	X	
21	Protocol to CMR, 1978					X	X		X			X	
22	TIR Convention, 1959	X			X		X		X	X		X	
23	TIR Convention, 1975	X	X	X	X	X	X	X	X	X	X	X	X
24	Temp. Imp. Com. Vehicles, 1956			X	X		X		X		X		
25	Customs Container Conv., 1956				X		X		X	X	X		
26	Customs Container Conv., 1972				X	X	X		X		X	X	
27	Customs Treatment Pallets, 1960				X				X		X	X	X
28	Harm. Front. Contr. Goods, 1982		X	X	X	X	X		X	X	X		X
29	Dang. Goods by Road-ADR, 1957	X		X	X		X	X	X	X	X		X
30	Protocol to ADR, 1993				X		X		X	X			
31	Perishable Foodstuffs (ATP) 1970	X		X	X	X	X		X	X	X		
	TRANSPORT AGREEMENTS AND CONVENTIONS	8	3	10	26	14	27	6	26	21	26	14	12

Table 8.) Participation of BSEC Member States in UNECE transport agreements and conventions.

* Newly ratified agreements

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