UNITED NATIONS
ECONOMIC COMMISSION FOR EUROPE
Inland Committee

SIMPLIFIED QUESTIONNAIRE ON TRANSPORT SITUATION IN 2006 / BELGIUM

1. TRAFFIC TRENDS

Short qualitative comments on the evolution of traffic volumes / prospects / trends.

1.1. Passenger traffic in general

As **car ownership** remains among the highest in the world (+-5 Mio cars for 10,5 Mio inhabitants), congestion - still mild by international comparison - is getting worse around the cities.

The sale of motorized two-wheeled vehicles is up and the cycling culture keeps going strong in the northern part of the country, while there is a growing interest in Brussels and Wallonia.

1.2. Public transport

However, due to attempts at a more sustainable mobility of the authorities and more client oriented policies of the companies, all modes of domestic public transport are growing steadily:

- Continual growth in the number of rail passengers, as in other forms of public transport, due to government efforts at a modal shift for commuters and a more attractive commercial attitude of the rail road company NMBS/SNCB. Between 2000 and 2006 the number of train passengers on domestic connections grew by 34%: from 139,9 to 187,5 million. In 2006 the *total* number of rail passengers grew by 6,3% and climbed to a record number 204 Mio, of which 189 Mio were transported within Belgium and 15 Mio in international traffic (mostly Thalys: and Eurostar:3.9 million passengers, up 4,8%).
- Record numbers of passengers were also registered for the Brussels metro, bus and tramway-operator MIVB/STIB: between 1996 and 2006 the Brussels public transport company saw the number of its passenger soar from 161,8 million to 269,4 million, up 67 %. The same goes for the regional bus and tramway-operator De Lijn in Flanders: between 1996 en 2006 the number of passengers doubled from 214,9 million to 463 Mio; the pace of growth was still 3% in 2006. For the Walloon public transport operator TEC the growth over the past decade was substantial (+47% between 2000 and 2006), but more modest than in the 2 other regions.

1.3. Air passenger transport

Passenger traffic in Brussels Airport continues to grow after a serious dip in 2001-2002 when the national air carrier Sabena went out of business and in the wake of 9/11 attacks. An annual 17 million passengers transited through Brussels in 2006 (+530.000) and figures are further on the rise, but are not expected to reach the number of passengers of 2000 soon (over 20 Mio). Of this total 6 Mio (up 8%) made use of the services of the new national carrier SN Brussels Airlines and its merger partner Virgin Express, who adopted the name Brussels Airlines as of March 2007.
As of 2007 Brussels Airport started to offer new European destinations such as Vienna, Budapest, Prague and new oversees destinations such as Philadelphia, Detroit and Mumbay.

Furthermore, thanks to permanent upgrading, excellent scores for punctuality, safety standards and quality of service, the activity on the regional airports of Charleroi (2,2 Mio passengers, up 16%), Liège (330.000 passengers, up 7%) is equally expanding in 2006. Traffic growth in regional airports like Ostend-Bruges and Antwerp lags somewhat behind; promising niches are explored however.

1.4. Freight transport in general

Due to the geographical situation of the country - at the heart of major European markets - and its expertise in transport and logistics, goods transport in Belgium is expanding at a steady rate in all modes. Overall traffic volumes are up in 2006 and - given the growth in the world economy (e.g. in China, Brazil, India) - volumes are expected to continue to grow.

Containerisation of freight continues at a steady pace, resulting in impressive traffic growth in the seaports of Antwerp and Zeebrugge.

Growth in inland transport demand remains primarily attracted towards road haulage (+-75%): because of the advantages it still offers in terms of flexibility, reliability and price it is favoured over railroad (+-11%) and inland navigation(+-14%). Goods transport over railroad and inland waterways is steadily expanding however.

1.5. Road freight transport

Despite efforts made towards a more sustainable modal split, road haulage is expected to continue to grow faster than the other modes. For Belgium this trend means an enormous expansion of road transport expected by 2015.This is mainly but not exclusively due to:

- The choice of Belgium as European Distribution Centre for the logistics of a great number of multinationals (already over 450 EDC's in 2006) on the grounds of the exceptional location, road network and logistics-know how of the country;
- The fast expansion of the port of Antwerp, a main gateway to the richest European markets for (container) goods coming from overseas;
- Fierce competition from Eastern European countries causes a delocalisation of the truck fleet and a turnaround of part of Belgian transport businesses towards logistics management.

1.6. Rail freight transport

After still mitigated results in rail cargo in 2005 (+1,6%), turnover grew by 6,6% in 2006 to 61,6 Mio tonnes. Calculated in tonnes-kilometres the expansion of rail cargo is even more promising: traffic climbed from 8,11 to 8,56 billion tonnes-kilometres, generating a financial turnover of 385,5 Mio euro (+15,5 %). So at last efforts to increase the part of railroad transport in the modal split paid off in 2006 and profitability of operations improved.

In 2006, further public and private initiatives were taken, mainly in the field of international rail cargo. The liberalisation of the domestic market as of the 1st of January 2007 is not expected to have much more impact on traffic volumes than the ongoing trend.

1.7. Intermodal transport

It remains rather marginal, though the trend is positive;

- Rail: for the years 2005 to 2007 financial aid has been organized by the authorities for railroad stretches intended for intermodal rail cargo initiatives. In 2005 this resulted in a consolidation of existing traffic.
- Air**:** the interface air cargo/inland transport remains monopolised by road haulage. However, a study is underway in the Walloon Region with operators of Aéroport de Paris on the feasibility of HST/Freight-feedering.

1.8. Inland navigation

With a modal share of 14% inland navigation is significant in Belgium.

- Inland navigation was again characterized by steady growth in 2006: e.g. traffic volumes were up 10,4 % in the port of Ghent.
- Thanks to infrastructure works by regional governments and new industrial opportunities, stimulated a.o. by European incentives such as the Marco Polo and Naïades-programmes, further growth is expected.
- The inland ports of Liège and Brussels (4,2 Mio tonnes, up 40%) flourish as they are gradually turned into multi-modal hubs.
- The new estuary traffic of river-sea going vessels at the port of Zeebrugge is expected to give a further boost to inland navigation in 2007.

1.9. Maritime

Generally speaking, there is steady growth, also of short sea shipping (SSS).
Traffic growth in the port of Antwerp continues steadily, whereas the deepsea container port of Zeebrugge shows exceptional growth of turnover over 2006. After a decade of fast growth the port of Ghent seemed to struggle somewhat with its expansion in 2004, but was creative in finding solutions in 2005-2006, as well in inland navigation as in maritime traffic.
Where container transport is concerned, SSS is bound to become an ever more important feeder in international maritime traffic as ports are increasingly confronted with the gigantism of ships (up to 13.000 TEU!). For the ports in the Hamburg-Le Havre range the main challenges lie in providing adequate access through a better draught and optimal mobility, supply chain management and logistics in the hinterland.

- From January to June 2006 total turnover in the seaports of Antwerp, Zeebrugge, Ghent and Ostend was 118 Mio tonnes, of which SSS traffic accounted for +-60 Mio tonnes, up 6% compared to the same period of 2005 (56,5 Mio tonnes)[1]. Total traffic in 2005 amounted to 224,6.Mio tonnes, 50% of which was SSS.
- The port of Antwerp hit a new record in 2006 with a total turnover of 167,3 Mio tonnes, up 4%; Antwerp container traffic hit an all time high at 7 Mio TEU (up 500.000).
- At 24 Mio tonnes, maritime traffic was up 8% in the port of Ghent in 2006, while inland navigation grew with a record 10,4% here to 18,3Mio tonnes.
- The strongest growth of all Belgian ports - and of all ports in the Hamburg–Le Havre range for that matter - was realized by the deep seaport of Zeebrugge (+13,6%); by the end of 2006 total turnover stood at a record 39,3 Mio tonnes, compared to 34,59 Mio tonnes in 2005; container traffic grew by a record 16,5% to 1,64 Mio TEU.
- The port of Ostend is doing well again after a previous dip and hit the 8 Mio tonnes-mark in 2006.
- Furthermore, the Belgian fleet kept its capacity of 6 Mio tonnes (dwt) in 2006, up from 1,5 Mio tonnes in 2004.

[1] Source : SSS Vlaanderen

1.10. Air cargo

It had a steady growth in 2006.

- With 719.560 tonnes of goods in 2006 **(+2,4%)** Brussels Airport maintains itself among the top 5 of European airports for air cargo. The strong annual expansion of air cargo in Brussels is expected to slow down somewhat by 2008, when DHL will move the bulk of its night flights to Leipzig (Germany) as further expansion of night flights in Brussels is limited due to population density and sub-urbanisation;
- Furthermore, cargo activity on the regional airports of Liège-Bierset (406.525 tonnes of cargo in 2006, up 24%) and Ostend-Bruges evolved in different directions (a mere 100.000 tonnes compared to 108.000 tonnes in 2005, down 9%) due to local factors.

2. OBSTACLES TO THE DEVELOPMENT OF TRANSPORT

2.1. General obstacles

- The intricacy of the Belgian political system, with a split up of responsibilities between the EU, the federal and the regional governments;
- Some lack of coherence between policies in the field of transport & mobility, environment and fiscal policy;
- Obligations under the Kyoto Agreement and other environmental challenges;
- The unfinished liberalisation of transport at the European level, preventing an evaluation of the real strength of the underlying market trends and thus of a reorientation of policies in the field of transport and logistics;
- Moreover, the problems of calculating and internalising external costs asks for solutions on EU-level so that a new modal split can underpin real multi-modality.
- Due to its small scale and central location, Belgium depends upon EU-decision making and EU-budgets where the huge European infrastructure projects (TEN's) are concerned; however, this is also in some respects an *opportunity* for a small open economy;
- Road congestion, especially around Antwerp and Brussels, though mild in comparison with neighbouring countries;
- The exiguity of the territory combined to the high density of the population and decades of sub-urbanization limits the growth of night flights at the air ports and creates scarcity of land for further development of massive transport infrastructure;

2.2. Road transport

Fierce competition from Eastern European countries increasingly leads to delocalisation of the truck fleet and /or transport business, especially in long distance haulage. Problems of "shortage of wheels and truckers" lie at the basis of the turnaround of part of Belgian transport businesses towards logistics management.

A problematic evolution is the growth in recent years of heavy transit traffic on toll free Belgian roads, mainly trucks to the Chunnel and the ferries in Calais (Fr.) as links from the northern European ports to the UK are shifting from unaccompanied traffic to accompanied traffic now that large haulage companies are hiring dozens of cheap drivers from Eastern European countries (after a growth of +150% between 2000 and 2003, this traffic grew by another average 10% between 2003 and 2006 and is still going strong). This trend clearly goes against EU-promotion of the "Motorways of the Sea".

2.3. Railroad

- Due to previous investment deficit and given the density of the Belgian railroad network, there are a few bottlenecks in the passenger traffic to and from Brussels and in the freight transport to and from the ports.
- The reliability of rail cargo systems and the traceability of goods remains the main challenge for combined rail/road haulage transport systems. This reliability depends on all operators in these mainly international supply chains.

- Within Belgium the priority of passenger traffic over freight regularly gives rise to problems due to shortage of tracks on some crossings and also due to lack of dedicated traction capacity for freight.
- Another obstacle to be overcome is the lack of interoperability of personnel and infrastructure in international rail traffic.
- Finally there is some tension with The Netherlands over the Iron Rhine-railroad linking the port of Antwerp to Germany.

2.4. Inland navigation

The pace of growth is hampered by severe competition and the low profitability poses a threat to the renewal of the fleet.

2.5. Maritime

- The EU-habitat directive and tensions with The Netherlands over the river Scheldt used to complicate the expansion of the port of Antwerp, but solutions are under way;
- Due to traffic growth there is increased risk for port congestion as hinterland connections begin to reach their maximum capacities;
- Speaking in terms of competitiveness, SSS still suffers from administrative burdens when compared to road traffic, slowing down the pace and/or reducing the smoothness of SSS traffic flow;
- Maritime and inland containers are still based on different standards, impairing their interoperability.

2.6. Air transport

Sub-urbanization hinders further expansion of night flights at Brussels Airport.

3. BEST PRACTICES IN TRANSPORT REGULATION AND INFRASTRUCTURE

3.1. Option for sustainable mobility

In principle, authorities at all levels are in favour: EU, Belgium, Regions, local authorities**.**

3.2. Regulatory framework. Regulations influencing modal split

- In order to combat congestion on the road during peak hours, the federal government offers free public transport to civil servants and subsidizes part of the public transport fares for commuting workers in the private sector. Due to this initiative a fair percentage of workers have already switched to train, bus, tramway or metro.
- Authorities at all levels also stimulate the new cycling culture: on a daily basis Belgian households make over an million cycling trips, mainly trips to school, work or shopping.
- In the same context of clearing the roads of excess commuter traffic, some timid forms of fiscal advantages are offered to employers and employees alike.

3.2.1. EU-rules on the liberalisation of the use of railroad infrastructure

The progressive access for new operators favourably influences the rail traffic offer, but national authorities fear cherry-picking amongst the more profitable operations and lines.

3.2.2. Regulations influencing road security

In conformity with EU-policy, the traffic code and transport regulations were made more stringent and police/camera controls intensified in order to further reduce the number of casualties on the Belgian roads. This policy proves successful as the number of people killed in road traffic has dropped significantly between 2000 (+-1500) and 2006 (+-1000).The rate at which the number of accidents and casualties comes down is slowing however.

3.3.Upgrading of infrastructure & filling in of missing links

3.3.1. Road infrastructure

In general, road infrastructure remains among the best in the world.
The Flemish Region plans to fill in a number of missing links, especially in the hinterland of the ports of Antwerp and Zeebrugge.
In 2006 the Walloon region launched a pilot project whereby fast bus services could make use of adapted stretches of the emergency lane on the highway to Brussels; an evaluation of this project is expected in the near future. A similar project in the Antwerp region by the Flemish Region has been continued.

3.3.2. Road pricing

In December 2005 the regional governments - who are responsible for infrastructure policy - took the option to make an end by 2009 to the toll free use of Belgian's highways; the reasons are both environmental (internalisation of costs) and financial (40% of truck traffic is international transit);

3.3.3. Railroad

- The density of the Belgian railway network remains amongst the highest in the world; still the firm option has been taken to upgrade the main rail connections that are part of the Trans-European Network and to fill in some missing links.
- Moreover the decision by Infrabel – responsible for rail infrastructure - to put in place the ETCS for the main railroad network is expected to heighten the capacity and the safety of rail traffic from 2012 onward; work has already started on the HST-lines.
- Amongst the new railroad infrastructure taken into service in 2005-2006 there is, on the one hand, the “Diabolo-railroad link” to Brussels Airport and “the bypass of Leuven”, seriously reducing travelling time for train passengers coming from the eastern part of the country to Brussels and beyond; on the other hand, the correspondance to Luxembourg has been improved by the reopening of the Virton-Athus-Arlon crossing.
- In 2006 works at the suburban railroad around Brussels continued; this so-called GEN-project is mainly intended at commuters and should alleviate congestion of motorised traffic in the Brussels area;
- The recent option by the Regions to promote and expand plant sites with a rail siding ought to contribute to the growth of railroad cargo and multi-modal transport as multimodal hubs are being created around the ports and some main logistic centres.
- In order to speed up the construction of the 18 km long missing railroad link “Liefkenshoektunnel” to new multi-modal container terminals in the port of Antwerp, the Flemish government made the necessary budgetary reservations in 2006 so that the work can start. Realisation is planned for 2011 instead of 2015 in view of the expected exponential growth of container traffic in the hinterland of the port.
- Rail tariffs: in 2006 new agreements between the authorities and the rail road operators have led to simplifications and common ticketing with other forms of public transport like the Brussels underground and regional bus and tramway companies; existing special tariffs have been extended to new social and age groups.

3.3.4. Inland navigation

- More emphasis on safety and renewal of the fleet; inland navigation also profits from huge investments by the regional governments in quays along waterbound industrial sites;
- Development of standards for river-sea going vessels: in order to decongest road traffic around maritime ports and to link them to inland waterways use is made of river-sea going vessels for estuary traffic.
- TEN’s: EU-decision to upgrade the main canal connecting the Belgian and French inland waterways and firm option to fill in some missing links (Canal Seine-Nord) as part of the Trans-European Network.

3.3.5. Maritime

Belgian ports are being better integrated with the road and rail networks and, as such, are a prime examples of multi-modality; missing links are being built through public-private cooperation.
The ports fully play their role as main SSS-hubs in the EU-project “Motorways of the Sea”.

3.3.6. Air transport

Brussels Airport and other more local airports, like Charleroi, Liège and Ostend-Bruges, are being turned into multi-modal hubs, both for passengers and high value cargo. In 2006 permanent upgrading of infrastructure, safety and service levels in all Belgian airports was intensified further.

3.4. Technological progress

Being a small open economy and transit country, Belgium hopes for progress in the GALILEO-satellite navigation programme of the EU as a key instrument for the development of an intelligent, safe and efficient transport system in Europe;
The country also favours the speeding-up of the introduction of advanced telematics in the transport sector, both for reasons of road safety and traffic management.

3.5. Information needs

Belgium favours adequate, reliable, swift, and homogenous international statistics on transport and mobility and expects initiatives at EU-level.