

# Developments related to the work of the International Transport Forum

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International Transport Forum

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UNECE

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# International Transport Forum

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- ▶ An **Intergovernmental Organisation** with 57 Member countries focussing on transport
  - ▶ A **think tank** for global transport policy issues
  - ▶ An **annual summit** of Ministers and stakeholders

## Outputs

- ▶ Decisions and **Key Messages** from Transport Ministers, policy recommendations
- ▶ Research **reports, publications, data, Round Tables**, conferences...
- ▶ **Multilateral Quota** of transport Licences (ECMT)

new website: [www.itf-oecd.org](http://www.itf-oecd.org)



## Mission

“Our goal is to help **shape the transport policy agenda on a global level**, and ensure that it contributes to economic growth, environmental protection, social inclusion and the preservation of human life and well-being.”



## Annual Summit

- Ministerial Meeting and Declaration from Ministers
- Ministers' Roundtables
- Panel discussions with Ministers, industry, research, civil society
- Bilaterals and networking
- Exhibition
- 1100 participants from 70 countries (2016)





# **GOVERNANCE OF TRANSPORT**

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**31 MAY - 2 JUNE**


**LEIPZIG, GERMANY**



# EXPLORE THE TRENDS SHAPING TRANSPORT REGULATION

Transport governance shapes decisions from local cycle paths to global trade routes. But what exactly does good governance of transport involve in today's complex political and economic environment?

Through the lens of governance, the Summit will examine four specific aspects: infrastructure investment, global connectivity, regulation for innovation, and urban access and mobility





# CONNECTIVITY FOR A GLOBAL ECONOMY

Well-developed global transport networks facilitate trade flows and foster individual mobility. Better transport links open up new markets for businesses.

They promote economic and social development by offering better access to employment, education, health services and opportunities that change lives.



# INFRASTRUCTURE

## FOR TOMORROW'S MOBILITY NEEDS



Reliable transport services require good infrastructure. But investing in ports, bridges or tunnels is expensive and fraught with risks that need to be managed.

As governments struggle with budget limitations, it becomes ever more important to clarify and enhance opportunities for private investors and develop sustainable financing models.





# REGULATION FOR INNOVATION

New technologies and business models create enormous opportunities. They could reduce pollution and congestion and make transport more user-friendly.

Yet they also create challenges. Regulation require adjusting existing regulatory frameworks to accommodate the dynamic of the digital economy while protecting consumers and the environment.



# URBAN ACCESS FOR BETTER MOBILITY



City-dwellers take more than 10.5 billion trips every day. In urban areas, crowded streets and subways pose a daily challenge for users, while city officials struggle with divided responsibilities for the network.

Defining urban transport as a provider of access, not mobility, offers a path out of traffic gridlock. A good transport governance framework is the first step to embark on it.

# Think Tank

- Evidence-based research and analysis
- Data and statistics
- Identification of best-practice policies
- Covering all transport modes and multiple issues
  - safety and security, access, environment, financing, regulation, tech innovation...
- ITF resources freely available on [www.itf-oecd.org](http://www.itf-oecd.org)



## Some of our work on Logistics

### Logistics Development Strategies and Performance Measurement



Logistics performance is a strong determinant of national income and policy-makers are interested in logistics performance indicators because of the potential for improved transport services to promote economic development. This report examines how careful use of indicators can drive improvement, making recommendations for public sector organisations developing logistics performance indicators

Roundtable Report, 2016

**5%**

WEF estimate of the increase in world GDP if all countries reached reasonable customs performance and hinterland transport infrastructure quality levels

### Capacity to Grow: Transport Infrastructure Needs for Future Trade Growth



This report examines what increased global trade means for the world's transport infrastructure. Growing, more complex international freight flows will change capacity requirements and reshape the global transport networks over coming decades.

Corporate Partnership Board, 2016

**1.5**

The rate at which developing countries will grow, as compared to developed countries by 2050

### Establishing Mexico's Regulatory Agency for Rail Transport



To assist in building the regulatory capacity needed, the ITF and the Ministry of Transport and Communications organized a consultation for Mexican regulators with the key rail regulatory institutions in Canada and the United States of America to review the practice of regulation and resources allocated to it in these jurisdictions. The report summarises the findings of the consultation

Case-Specific Policy Analysis, 2016

**50%**

Increase in rail tonne-km since transferring to private operators in 1998

### Logistics Observatory for Chile



This report was prepared to help the Ministry of Transport and Telecommunications of Chile in developing a statistical centre for freight transport. It identifies the role of the logistics observatory, its Key Performance Indicators and a potential implementation plan. Strong governance and leadership, combined with good technical capability from a core team and stable, long-term funding are critical for the success of the observatory.

Case-Specific Policy Analysis, 2016

**160  
trillion**

The expected maritime transport (tonne-km) by 2030

## Some of our work on Logistics

### Transport Outlook 2017



The ITF Transport Outlook provides an overview of recent trends and near-term prospects for the transport sector at a global level, as well as long-term prospects for transport demand to 2050. It presents alternative policy scenarios for long-term trends in transport demand and CO2 emissions from all transport modes, freight and passenger. A focus on accessibility in cities highlights the role of policies for sustainable transport.

Transport Outlook, 2017

### Logistics Strategy and Performance Measurement: Mexico's National Observatory for Transport and Logistics



Mexico has an effective transport and logistics sector that has provided the backbone for growth in the economy. Marshalling this evidence will be the objective for the National Observatory for Transport and Logistics currently being established. This report was prepared to help set the priorities for its initial phase of development.

Case-Specific Policy Analysis, 2015

### The Impact of Mega-Ships



Container ships have grown incessantly over recent decades. The economies of scale have decreased transport costs and facilitated global trade. But bigger ship sizes and the speed of their introduction has consequences for the rest of the transport chain.

Case-Specific Policy Analysis, 2015

### Drivers of Logistics Performance: A Case Study of Turkey



This report discusses the importance of logistics performance and assesses this performance in the context of national competitiveness, following the composition of The World Bank's Logistics Performance Index.

Corporate Partnership Board, 2015

### Port Investment and Container Shipping Markets



Large-scale port projects have irreversible effects on the local economy and community. This report examines the issues to be considered before the decision for costly expansions with long-life spans. The report benefits from a case study of port expansion in Chile.

Roundtable Report, 2015

### Discussion Papers

Port Hinterland Connectivity  
Discussion Paper, 30 April 2015

The World Bank's Logistics Performance Index (LPI) and Drivers of Logistics Performance  
Discussion Paper, 1 February 2015

Performance Measurement in Freight Transport  
Discussion Paper, 1 February 2015

Performance Measurement for Intermodal Corridors  
Discussion Paper, 1 February 2015

Supply Chain Performance Measurement in Latin America  
Discussion Paper, 1 February 2015

International Freight and Related CO2 Emissions by 2050: A New Modelling Tool  
Discussion Paper, 1 December 2014

# Some of our work on investment/Planning

## Quantifying the Socio-economic Benefits of Transport



Socio-economic cost-benefit analysis (CBA) provides a quantitative measure of the extent to which, over its lifetime, a project or initiative will bring the community benefits that exceed its costs of construction and operation. This report describes efforts to improve the quality of transport CBA and its applicability to decision making.

Roundtable Report, 2017

**15-60%**

Estimated increase in travel-time benefits of Dutch road projects from improved reliability

## Airport Demand Forecasting for Long-Term Planning



This report reviews the state of the art in forecasting airport demand. It focuses on demand risk, passenger behaviour and uncertainty, discussing how to make effective use of analysis in planning decisions. Demand forecasts are central to the case for investment.

Roundtable Report, 2016

Markets that have been de-regulated have seen rapid growth as prices fell and new, low-cost business models emerged.

## Port Investment and Container Shipping Markets



Large-scale port projects have irreversible effects on the local economy and community. This report examines the issues to be considered before the decision for costly expansions with long-life spans. The report benefits from a case study of port expansion in Chile.

Roundtable Report, 2015

**13 000**

Capacity (in number of TEU containers) of largest ships passing the expanded Panama Canal, up from 5 000

## Valuing Convenience in Public Transport



Convenience shapes users' transport experience. Yet for public transport it is not always clearly defined and not often measured. This report reviews operational definitions, the willingness of users to pay and the use of indicators to improve convenience of public transport.

Roundtable Report, 2014

**6%**

Additional value of public transport project investment including measurable benefits of reduced crowding

## Some of our work on investment/Planning

### The Economics of Investment in High-Speed Rail



This report examines the key factors that drive the costs of high-speed rail investment and reviews the economic benefits delivered by high-speed rail services on the basis of experience in countries that have developed large high-speed rail networks.

Roundtable Report, 2014

### Better Regulation of Public-Private Partnerships for Transport Infrastructure



The report examines the nature of risks and uncertainty associated with different types of PPP project and the practical consequences of transferring risks to private partners. It assesses the fiscal impact of PPPs and discusses budget procedures and accounting rules to limit the public liabilities they can create.

Roundtable Report, 2013

### Ex-post Assessment of Transport Investments and Policy Interventions



This publication examines the role ex-post project evaluation can play in enhancing decision making for future transport investments. Ex-post analysis can make investment more accurate in validating the inputs to the evaluation and it can also help improve the method of evaluation itself.

Roundtable Report, forthcoming

### Assessing Regulatory Changes in the Transport Sector



A number of techniques can be employed to carry out regulatory impact assessments (RIA), such as cost-benefit analysis, cost-effectiveness analysis and multi-criteria analysis. While OECD countries are increasingly adopting some of these methodologies, challenges remain in ensuring that RIA is an effective tool for policy making.

Roundtable Report, forthcoming

### Integrated Transport Development Experience in Global City Clusters



This Roundtable investigated international experience and lessons learned from integrated transport development in large-scale urban regions and city clusters and discussed how these may be relevant, or not, to the Chinese and other emerging economy contexts.

Roundtable Report, forthcoming

### Public Transport Market Organisation and Innovation



This ITF Working Group currently reviews how different models of urban public transport market tendering and organisation deal with challenges such as jurisdictional coordination, powerful incumbent operators, new mobility options and evolving travel patterns.

Research Report, forthcoming

### Discussion Papers

National Issues in the USA in Economic Development, Mobility, and Income Inequality

Discussion Paper, 13 October 2016

Balancing Financial Sustainability and Affordability in Public Transport

Discussion Paper, 13 October 2016

Deregulation, Franchising, Outsourcing and Corporatisation in Local Public Transport

Discussion Paper, 19 September 2016

Competitive Tendering in Local and Regional Public Transport in the Netherlands

Discussion Paper, 18 September 2016

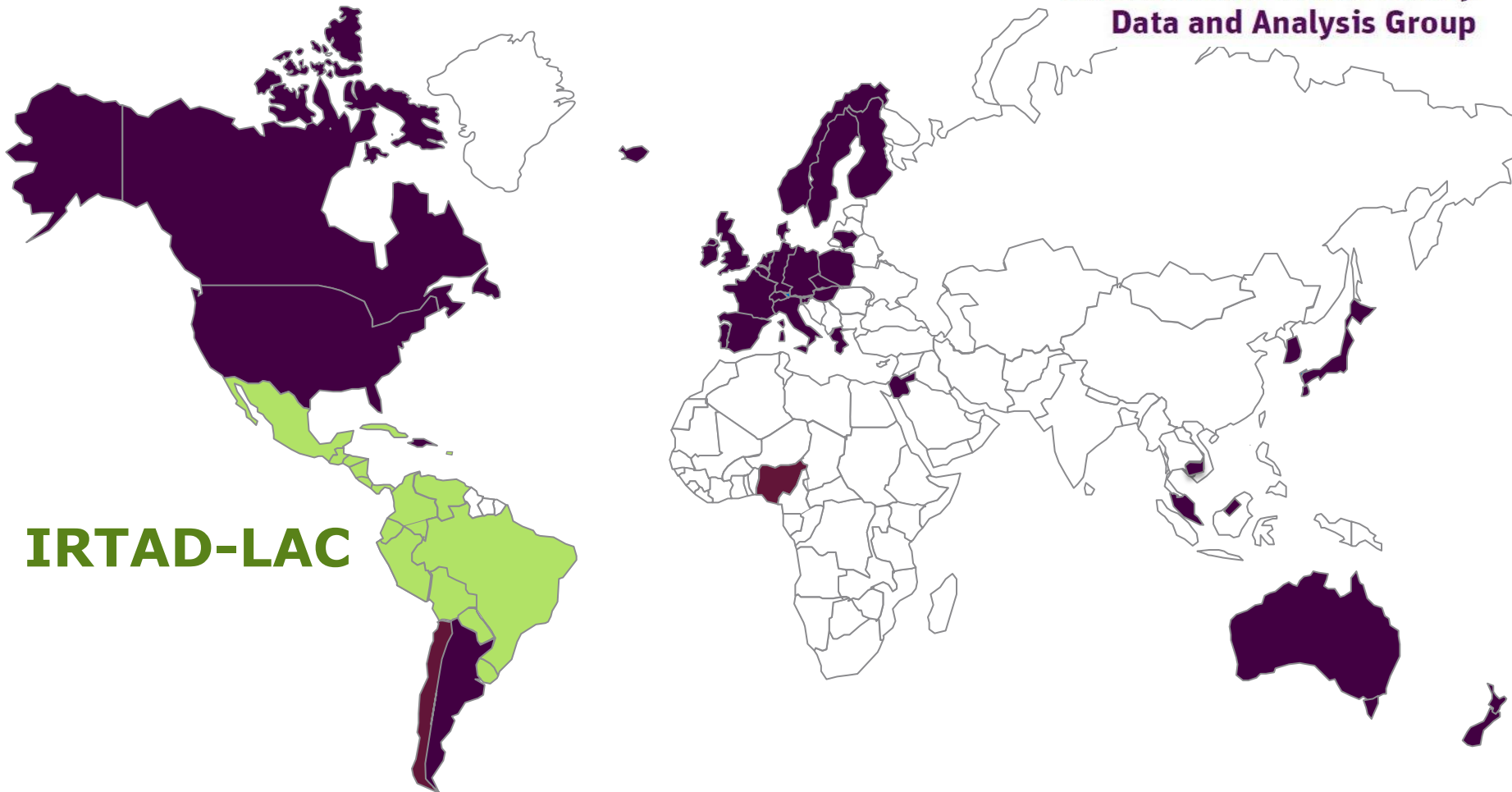
Private Sector Participation in Infrastructure: Can the Price of Risk Transfer be Efficient?

Discussion Paper, 26 February 2016

**IRTAD** 70 members or observers from 38 countries  
The database includes validated data from 32 countries



**International Traffic Safety  
Data and Analysis Group**



**IRTAD-LAC**





# **IRTAD: the International Traffic Safety Database and Analysis Group**

- Permanent working group
- Network of experts, representing key road safety stakeholders
- Mission
  - Networking for road safety professionals
  - World standard road safety database
  - Data analysis

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# IRTAD Outputs

- Annual report on road safety performance (2015 report includes detailed reports for 38 countries, including Observer countries)
  - Road safety databases:
    - IRTAD
    - IRTAD LAC (dedicated to Latin American Countries)
    - IRTAD for the cities (in development)
  - Research reports:
    - Serious injuries
    - Speed and crash risk
    - Road safety and economic development
    - Forecasting
    - Infrastructure road safety management
    - Methodologies to define alcohol related crashes
  - Annual meetings and permanent networking
  - Twinning projects with new countries
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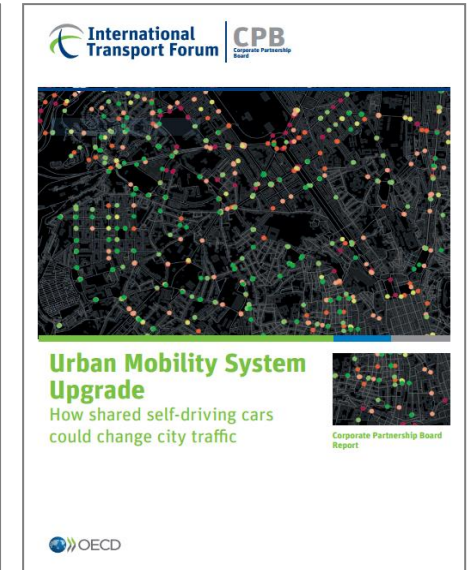
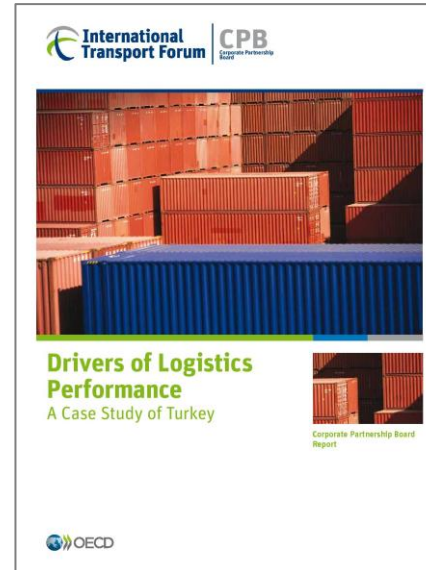
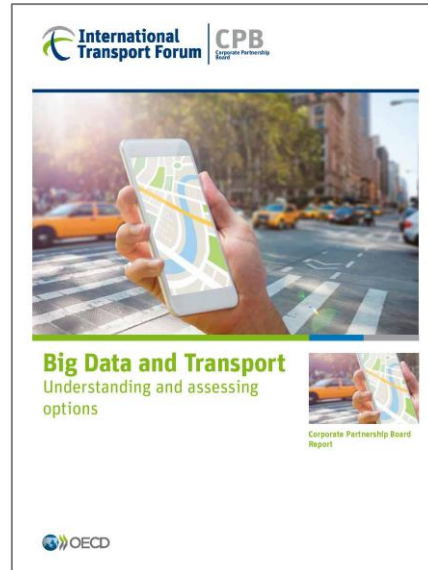
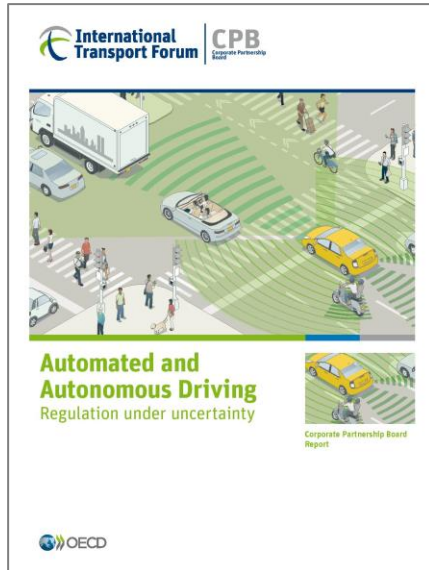
# Corporate Partnership Board

- Established in 2013 as the ITF's platform to enrich policy analysis and discussions with a corporate perspective
- Current Members (28)
- Set to grow to some 50 companies, from all modes of transport and associated sectors, with importance placed also on a balanced geographical representation

## Current CPB members (28)



# 2015 Corporate Partnership Board Reports





**Automated and Autonomous Driving:** Regulation under uncertainty


**Big Data and Transport:** Understanding and assessing options

**Drivers of Logistics Performance:** A case study of Turkey


**Urban Mobility System Upgrade:** How shared self-driving cars could change city traffic

# 2016 Corporate Partnership Board Reports


 





**Reducing Sulphur Emissions from Ships**  
The Impact of International Regulation



Corporate Partnership Board Report








**Capacity to Grow**  
Transport Infrastructure Needs for Future Trade Growth




Corporate Partnership Board Report




 






**Data-Driven Transport Policy**




Corporate Partnership Board Report




 



**App-Based Ride and Taxi Services**  
Principles for Regulation



Corporate Partnership Board Report



**Reducing Sulphur Emissions from Ships:** The Impact of International Regulation

**Capacity to Grow:** Transport Infrastructure Needs for Future Trade Growth

**Data-Driven Transport Policy**

**App-Based Ride and Taxi Services:** Principles for Regulation

## **2017 Corporate Partnership Board Reports**

- Project 1: Moving to Shared Urban Mobility: Managing Scale and Transition
- Project 2: New Mobility for an Ageing Society
- Project 3: New Approaches to Urban Access Mapping
- Project 4: Data-led Enforcement of Road Haulage

## ITF DECARBONISING TRANSPORT PROJECT

- An approach with two pillars: **Modelling** and **Dialogue**, in mutual support
  - A non prescriptive concept, help governments and other stakeholders in finding decarbonisation paths that are politically / economically feasible
    - Coordinated process involving **political, regulatory, managerial and technical competence**
    - **Leadership at international, national, regional and city level necessary** – operationally + politically
  - Facilitating **integration of UN SDGs** into transport and climate change actions
  - ▶ **Results produced at global, regional, national and city level**
    - 310 regions, all countries, 1600 cities
-



# PARTNERS



# ECMT Multilateral Quota System


- ▶ Introduced on **1 January 1974** by the ECMT Council of Ministers

## Objectives:

- ▶ Gradual liberalisation of road freight transport
- ▶ Rationalisation of the use of vehicles, reduce empty running
- ▶ Harmonisation of the terms of competition
- ▶ Use of environmentally friendly and safe vehicles (1991)

## Member countries participating in the quota system:

Albania, Armenia, Austria, Azerbaijan, Belarus, Belgium, Bosnia-Herzegovina, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, FYROM, Georgia, Germany, Greece, Hungary, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russian Federation, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine and United Kingdom.



## ECMT Multilateral Quota System

- ▶ **Multilateral character:** the possibility of using the licence for runs between Member countries
- ▶ **ECMT Licence:** a permit valid for a specific period of time for an unlimited number of journeys between Member countries (*subject to a certain limitation from 2005*)
- ▶ **Quota:** the number of licences made available to an ECMT Member country. The quota is determined by the Council of Ministers/ ITF Group on Road Transport
- ▶ **Size :** Estimated **5 to 9 %** of total international road freight in Europe

# ECMT Multilateral Quota System

## Key Documents

- ▶ **Guide** on the use of the ECMT Multilateral Quota, 2014 (English/French/Russian)
- ▶ **Quality Charter** for International Road Haulage Operations under the ECMT Multilateral Quota System - adopted by Transport Ministers in May 2015.
- ▶ **Resolutions and recommendations** adopted by Ministers

<http://www.itf-oecd.org/multilateral-quota-0>



# Development of the Quota

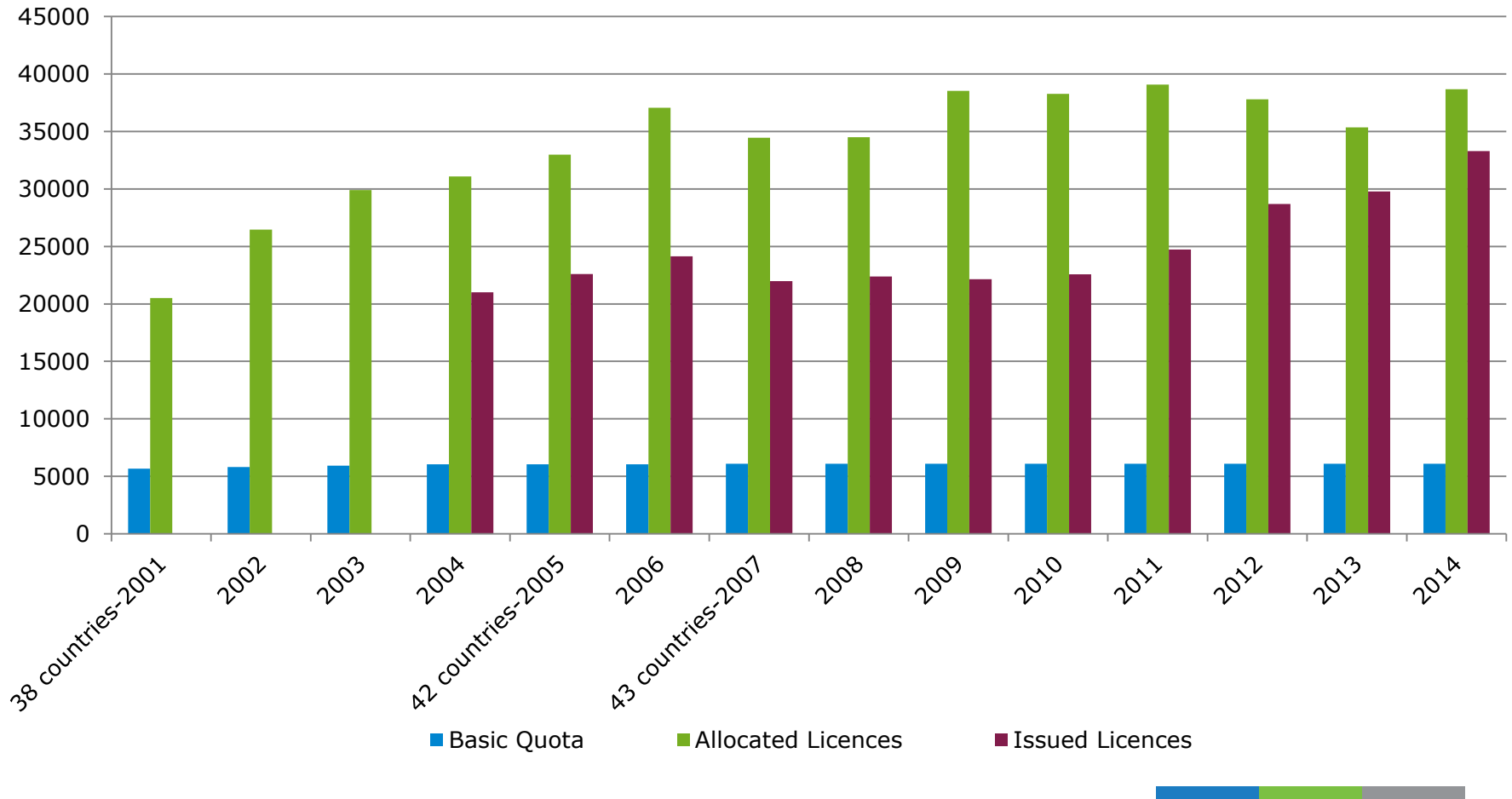
## Membership :

- ▶ Number of member countries in 1974 - **18**
- ▶ Number of member countries in 2001 - **38**
- ▶ Number of member countries in 2007 and since - **43**

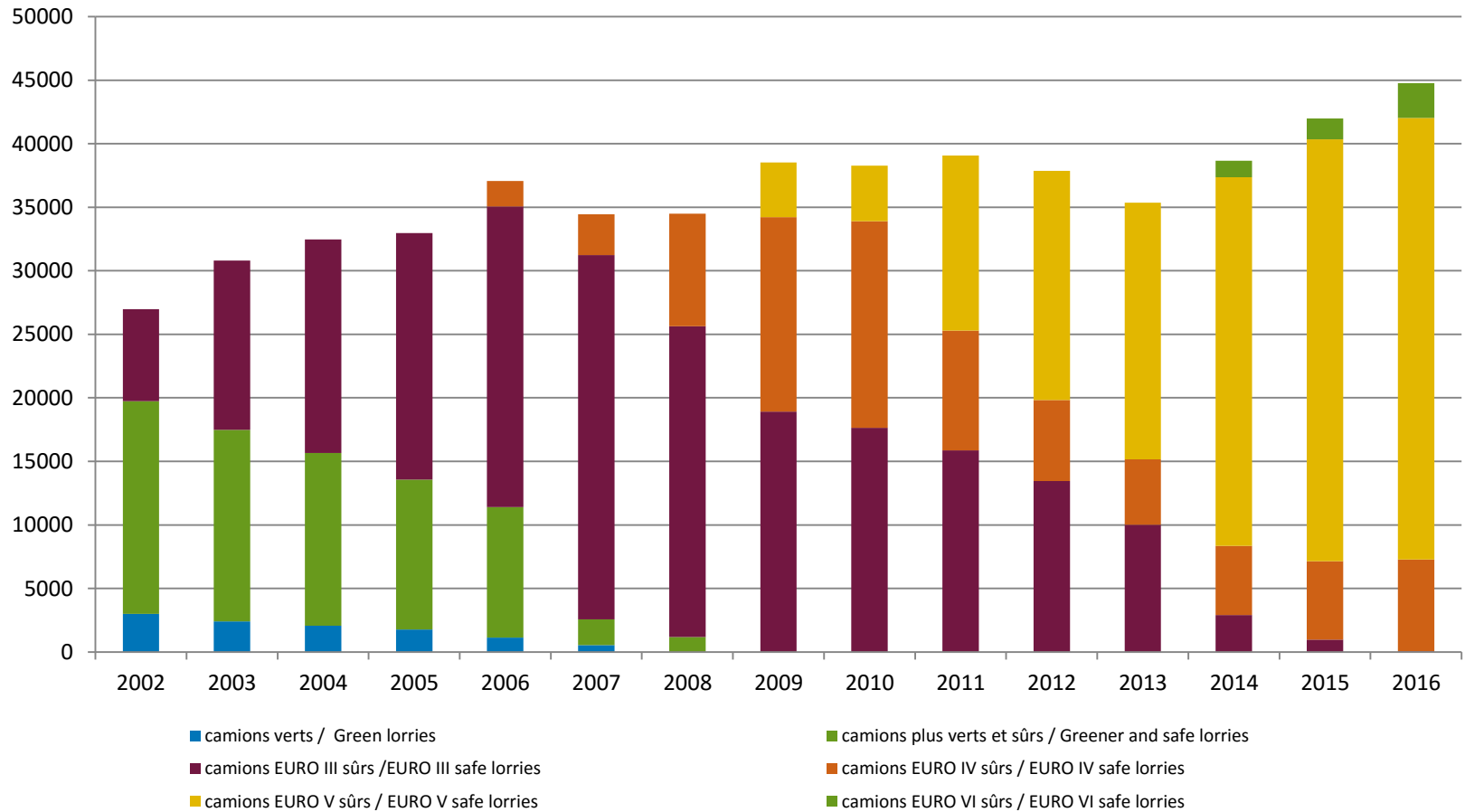
## Fleet quality :

- ▶ Introduction of "**Green**" (EURO I) lorries - 1991→1993
  - ▶ Introduction of "**Greener and Safe**" (EURO II) lorries - 1995 →1997
  - ▶ Introduction of "**EURO III safe**" lorries - 2000→2002
  - ▶ Introduction of "**EURO IV safe**" lorries - 2005→2007
  - ▶ Introduction of "**EURO V safe**" lorries - 2007→2009
  - ▶ Introduction of "**EURO VI safe**" lorries - 2012→2014
- 

## Trends in ECMT Licences, 2001-2014



## Breakdown of Licences by Lorry Categories, 2002-2016



## Development of the Quota: other factors

- ▶ Establishment of the Community's Single Market and European Economic Area – **1993**
- ▶ Liberalisation of the EU internal market for road haulage – **1998**
- ▶ Enlargement process in the European Union – **2004/2007**





# Role of the Quota in new realities: problems and challenges

## Road transport is crucial to economy :

- ▶ it carries most of the goods in Europe, its modal share is increasing worldwide

## But is under criticism for :

- ▶ environmental impact
- ▶ safety concerns
- ▶ lack of equity in social /employment conditions


## Global freight tonne-km to rise 2–4 times by 2050

- ▶ industry needs to meet the demand, for this :
  - ▶ it should address the above concerns and create a positive image
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## Role of the Quota in new realities: problems and challenges

- ▶ Multilateral Quota has always been a symbol of high quality
- ▶ This should be maintained and developed further

### Next steps to address the challenges:

- ▶ Introduction of **EURO VI** safe lorries from 1 January 2014 and elimination of older categories  Environmental impact
- ▶ **Quality Charter** for International Road Haulage Operations under the ECMT Multilateral Quota System:




# Quality Charter

Equally high standards for all Member Countries participating in the System related to:

- **Conditions of Establishment**
- **Good reputation**
- **Financial Standing**
- **Professional competence / Driver training:**  
Role of the IRU Academy crucial; support by the Transport Ministries / National competent authorities required
- **Safety/ Employment conditions / Checks and penalties**  
- tachograph mandatory in the System (AETR Agreement)

The Quality Charter enters into force on 1 January 2016. The provisions set out in Chapters I to IV shall apply to all international road freight haulage operations carried out under the ECMT licences **from 1 January 2018.**



## Quality Charter

**The aim of the Quality Charter is** to achieve high quality road transport in Europe and to create more harmonised conditions for more open international road transport markets.

By completion of three years the Group on Road Transport shall:

- evaluate the **extent of the implementation of the Charter**
- evaluate the **extent of possible incitation mechanisms for the development of ECMT Quota**
- examine the **opportunity and procedures for removal of reservations and restrictions** based on the extent of implementation of the present Charter achieved by the Member countries.



# Thank you

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