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**IMPORTANT FEATURES OF THE SERVICE SECTOR AND
TRADE IN SERVICES IN TRANSITION ECONOMIES**

TRANSPORT SERVICES*

Note by the secretariat

1. The development of modern transport and related infrastructure is critical for the development of international trade and the international mobility of production factors. Transport services are horizontal: they service all sectors of the economy at various stages of production, distribution and consumption. From a geographical perspective, effective transportation contributes to levelling out regional imbalances both within countries and at the European level. This transport function is particularly important in view of the integration prospects in Europe and intensified exchanges between the European Union (EU) and the Central and Eastern European Countries (CEEC).
2. In statistical terms, transport services include activities related to providing passenger or freight transport by rail, pipeline, road, water or air. Different types of transport vary considerably in terms of factor intensities. Rail and pipeline transport for example, are highly capital-intensive, whereas road transport is not. At the same time, rail transport and road transport are labour-intensive, whereas in the pipeline sector the labour costs are marginal.

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Growth

3. While data for the share of the transport sector in GDP are not available separately from those for the communication sector these two sectors taken together have maintained an important position in the economies of CEEC and Commonwealth of Independent States (CIS) countries during the transition to a market economy. In the 1990s, in central and eastern Europe, the share of the transport and communication sector in GDP (value added of all sectors) at current prices increased in the Czech Republic, Hungary, Slovenia and Lithuania, remained stable in Poland and Estonia, and dropped in Latvia and Slovakia (see table 1).

4. Over the same period, the growth trend was more pronounced in Southeast Europe and the CIS. In the former region, the share of transport and communication tended to grow in Bulgaria, Bosnia and Herzegovina and the former Yugoslav Republic of Macedonia, while in Albania, Croatia and Romania it remained stable. Within the CIS, over the same period, this share increased in Azerbaijan, Belarus, Georgia, Kazakhstan, Republic of Moldova, Turkmenistan, Ukraine and Uzbekistan. In Armenia, Kyrgyzstan and the Russian Federation the percentage of transport and communications in GDP was rather stable, while in Tajikistan it fell. In Azerbaijan, Belarus, Georgia, Kazakhstan, and Ukraine the growth of transport and communications was particularly dynamic, their percentage in GDP having grown by around two thirds since 1991.

5. At the end of the 1990s, the share of transport and communication in GDP was particularly high in Estonia, Latvia, Georgia, Kazakhstan and Belarus where it amounted to 12 – 15 per cent. In the majority of transition economies it ranged between 8 and 11 per cent and was particularly low in Albania, Kyrgyzstan and Tajikistan (2 – 5 per cent).

**Table 1: Share of transport and communication sectors in GDP
in European transition economies, per cent**
(current prices)

Country	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
<i>Central and Eastern European Countries</i>										
Albania	3.3	3.3	3.0	3.1	3.4	3.5	3.3	2.7	3.0	3.3
Bosnia and Herzegovina	6.8	...	...	...	...	6.1	6.4	6.6	8.9	10.3
Bulgaria	...	6.2	6.5	6.7	6.9	6.2	7.5	7.6	8.2	8.7
Croatia	8.3	9.1	6.1	5.8	8.2	9.6	8.8	8.7	8.4	8.6
Czech Republic	3.8	4.1	6.2	8.6	8.4	8.1	7.7	8.2	8.4	9.7
Hungary	...	9.1	9.4	8.8	8.5	9.0	9.2	9.7	9.9	10.2
Poland	...	...	6.4	6.6	7.4	6.6	6.5	6.5	6.4	6.6
Romania	6.1	7.0	8.3	10.4	9.1	8.1	9.4	9.7	9.7	...
Slovakia	...	...	23.9	8.4	8.9	8.6	8.7	8.4	10.9	11.1
Slovenia	8.6	7.9	7.3	7.8	7.5	7.7	7.6	8.0	8.2	8.2
The FYR of Macedonia	7.1	7.1	7.8	7.0	5.9	7.0	6.8	6.9	7.2	8.2
Yugoslavia	...	...	...	...	...	...	...	8.6	9.7	...
<i>Baltic countries</i>										
Estonia	...	...	14.1	12.4	11.6	10.5	10.8	12.2	13.8	14.5
Latvia	10.9	7.4	17.7	23.1	20.5	16.0	17.0	16.8	16.7	15.3
Lithuania	7.7	8.2	9.5	9.8	10.1	9.4	9.5	9.6	9.6	11.5
<i>Commonwealth of Independent States</i>										
Armenia	7.9	5.4	7.8	5.8	4.18	4.4	6.3	8.0	7.4	7.8
Azerbaijan *	8.9	6.5	5.5	7.9	11.9	18.4	11.2	11.3	12.4	15.3
Belarus	6.6	5.2	8.3	12.0	12.2	13.1	12.3	12.1	11.2	12.9
Georgia	7.4	7.3	4.2	3.8	5.2	9.0	5.7	8.0	11.4	12.9
Kazakhstan	9.3	7.3	7.4	9.9	11.4	11.1	11.8	12.2	14.6	12.7
Kyrgyzstan	5.7	3.9	3.0	4.0	4.7	4.8	4.9	4.5	4.9	5.2
Republic of Moldova	...	5.6	5.2	4.3	6.4	5.7	6.1	7.2	8.2	8.7
Russia	10.0	7.5	7.4	8.6	9.9	11.9	12.3	12.2	11.2	10.2
Tajikistan	6.8	3.8	4.4	1.4	2.7	1.5	1.8	3.2	4.5	2.1
Turkmenistan	...	...	3.4	5.2	4.8	5.1	5.9	10.8	8.0	...
Ukraine	7.6	6.2	7.9	10.9	8.5	13.1	14.6	14.3	14.4	14.1
Uzbekistan	5.9	4.0	5.1	5.9	6.1	8.1	7.7	7.4	7.9	8.0
<i>Selected West European Countries</i>										
Austria	7.2	7.4	7.6	7.6	7.5	7.0	6.9	6.8	6.8	6.6
Belgium	...	...	...	...	...	6.6	6.4	6.4	6.4	6.3
Denmark	6.9	6.8	7.0	6.8	6.8	6.8	6.9	7.0	7.2	7.0
France	...	...	...	...	...	...	...	...	...	...
Germany	...	5.5	5.4	5.4	5.3	5.4	5.2	5.3	5.4	5.2
Italy	6.7	6.7	6.7	7.2	7.1	6.9	6.9	6.7	6.9	6.8

* Note: transport, communication, roads

Note: Transport and communication include: activities related to providing passenger and freight transport, whether scheduled or not, by rail, pipeline, road, water or air; supporting activities such as terminal and parking facilities, cargo handling, storage, etc.; postal activities and telecommunication; renting of transport equipment with driver or operator.

Source: UN ECE Statistical DataBase and Eurostat

2. Structure

6. During the period of transition, the transport sector in the central and eastern European countries has gone through dramatic changes. New developments relate to the geographical direction of traffic flows, the types of transported goods, the traffic composition, the shift of traffic between modes and the emergence of dynamic private ownership in the transport sector.¹

7. During the 1990s, the direction of traffic from and to transition economies changed considerably: trade between the central and eastern Europe and the former Soviet Union has decreased, while commercial exchanges of transition economies with developed market economies have significantly increased. Consequently, transport routes leading westwards have gained in importance at the expense of those going eastward. The predominant trend now is towards exporting low value added products to the European Union and importing higher value-added goods into central and eastern Europe and further east. From this perspective, central Europe is increasingly acting as a transit region for European inland transport.²

8. The centralized planning system that prevailed in the region for decades gave priority to basic industries and rail transport mode. Land freight transport in the region was dominated by bulk rail freight traffic consisting of low value-added goods (such as coal, metal ores, metal products and construction materials) hauled over long distances.³ In central Europe the transport volume per unit of GDP was about five times that of western Europe (1.8 against 0.36 tonnes - kilometres/ECU).⁴

9. Under central planning, air transport played an important role only in the Soviet Union, where it amounted to about half of all commercial passenger traffic. In central Europe, cargo and passengers hauled by air were equivalent to only 10 per cent of rail traffic, while in western European countries this proportion was substantively higher (e.g. as much as about 80 per cent in France).

10. During the transition, the heavy bulk cargo typical of the CMEA transport system has been substituted by general cargo consisting mainly of high value consumer and investment goods. In some countries, road transport has proved to be better equipped to meet the increase in high value products than rail transport and has developed at an outstanding speed (see table 2).

¹ See LIJEWSKI, T., (1996), The impact of political changes on transport in Central and Eastern Europe, in "Transport Reviews", Vol.16, No.1, p. 37-53.

² See CHATELUS, G., (1993), Les Transports en Europe Centrale – Inadéquation de l'offre face a une demande restructurée, INRETS, Arcueil.

³ See GASPARD, M., (1991), Quels transports pour l'autre Europe?, Report prepared for the French Ministry of Public Infrastructure, Housing, Transport and Land Use, and the Commissariat Général au Plan, Paris; and DE WAELE, A., (1991), Consequences of Closer East-West Relations in Prospects for East-West European Transport, Proceedings of the ECMT International Seminar, Paris, December 1990, OECD, Paris, 1991.

⁴ See SUCHORZEWSKI, W. (1993), Infrastructure and Transport Renovation – Notably in the East-West Framework, Background Report for ECMT Round Table 95, Paris.

Table 2: Cargo transportation by road in selected transition economies
(tonnes – kilometres, millions)

Country	1990	1998	Indexes 1990=100
Albania	368.6	803	217.9
Bulgaria	9821	6278	63.9
Croatia	2603	2589.6	99.5
Czech Republic	...	33911	...
Hungary	15179.3	15987	105.3
Poland	40293	69542	172.6
Romania	28993	21750	75.0
Slovenia	4887	2900	59.3
The FYR Macedonia	2189	894	40.8
Estonia	2097	3791	180.8
Latvia	5853	4108	70.2
Lithuania	7336	5611	76.5
Armenia	...	213.4	...
Azerbaijan	3287	706	21.5
Belarus	...	3126	...
Kyrgyzstan	5226.9	1014.7	19.4
Moldova	6305	1018	16.2
Russia	68000	21000	30.9
Ukraine	79700	18300	22.96
Uzbekistan	...	1822.1	...

Source: UN ECE, (2000), Annual Bulletin of Transport Statistics for Europe and North America 2000, Vol. XLX, UN ECE, Geneva

11. At the same time, railways are restricting their operations, closing non-profitable lines, reducing the number of loading stations and giving up sidings, which provide little or no profit. Inland water transport, which mainly transports bulk cargo such as coal, ores, gravel and sand, has also suffered, but less so than the railways.

12. The rapid growth of road transport at the expense of rail transport in transition economies emulates the structural changes caused by the decline of heavy industries that occurred in the countries of western Europe in the 1970s and 1980s. However, in the mid-1990s these countries were still lagging behind their western European neighbours in terms of road transport weight: in 1995 freight transport by road accounted for 72.3 per cent of the total haulage in the European Union as compared with 41.5 per cent in central and eastern Europe.⁵

13. It should be noted that these market-driven changes in the transport infrastructure have certain negative economic and environmental implications. Motor vehicles require, on average, three times more energy to perform the same transport work as railways; they also require more workers and cause more

accidents. As roads become overcrowded, road vehicles tend to move at slower average speed using more fuel per kilometre. In terms of environmental protection, the excessive concentration of motor transport in the cities and on international motorways causes pollution and becomes a major factor in the deterioration of people's living conditions.

3. Privatization

14. During the years of transition, the transport sector has experienced massive transformations in ownership. This is particularly true if the road transport sector, being less capital intensive than rail, and having been largely privatized. The role of State-owned road transport enterprises in the central and eastern Europe has steadily decreased in terms of their number, production and turnover. Large State-owned public conglomerates have been restructured to form smaller specialized companies. At the same time, many new greenfield private enterprises have been created. Several formerly State-owned companies from transition economies, for example, Hungaro Camion in Hungary and Somat in Bulgaria, have re-equipped their vehicle parks and are now competing on international road transport markets.⁶

4. Trade in transport services

15. During the 1990s, several transition economies considerably increased their exports of transport services. This was the case, in particular, of Hungary, Poland and the Baltic States in central and eastern Europe, of Bulgaria and Romania in southeast Europe and of Belarus and Ukraine in the CIS region (see table 3).

16. During 1991 – 1997, in all the above countries (except Poland where the rates were lower) exports of transport services at current prices increased 3 to 4-fold. As a result, these countries have become or have reinforced their positions as net exporters of transport services.

17. In the second half of the 1990s, the positive balance in this kind of trade was particularly high in Belarus, Croatia, Czech Republic, Latvia, Poland, Slovakia and Ukraine.

18. The data available for some transition economies show that in the second half of the 1990s, exports and imports of transport services in those economies accounted for one to 4 per cent of GDP (see table 4). The weight of the respective exports and imports was the highest in Bulgaria and Slovakia, and the lowest in Russia and Hungary. During the second half of the past decade, the share of transport services trade in GDP tended to grow in Romania and Hungary, while in the other transition economies for which data are available it remained stable (Bulgaria, Russia) or tended to decline (e.g. the Czech Republic, Slovenia).

⁵ LIJEWSKI, T., *op. cit.*, p. 41.

⁶ COQUET, B., Le CACHEUX, J., (1996), «Les privatisations dans la perspective de l'intégration européenne», in «Revue économique», Vol. 47, No 6, nov 1996, p. 1333-1350.

Table 3: Exports and imports of transport services in selected transition economies
(USD, millions)

Country	Exports (Credit)							Imports (Debit)						
	1991	1992	1993	1994	1995	1996	1997	1991	1992	1993	1994	1995	1996	1997
Albania	2	3	9	12	18	30	12	5	38	51	47	60	82	55
Bulgaria	199	508	432	376	494	439	449	213	510	505	466	531	486	500
Croatia	...	...	696	665	707	732	665	...	...	355	348	400	416	399
Czech Rep.	...	...	1241	1244	1463	1334	1317	...	...	733	855	800	700	630
Hungary	49	17	66	51	446	418	502	128	121	161	210	370	316	426
Poland	1970	1993	2052	2438	3041	2752	3112	1525	1452	1340	1364	1768	1690	1590
Romania	223	136	291	381	471	572	486	374	377	341	403	604	692	664
Slovakia	...	...	460	539	616	643	740	...	...	289	162	307	394	342
Slovenia	...	276	446	487	505	481	465	...	439	390	418	435	405	365
Estonia	...	150	223	337	374	441	658	...	94	124	185	222	267	340
Latvia	...	275	425	600	659	706	716	...	99	130	136	153	173	201
Lithuania	...	...	165	208	287	358	443	...	...	1612	197	292	299	360
Armenia	...	...	...	4	14	36	51	...	...	36	32	43	92	92
Belarus	...	...	100	184	302	478	496	...	...	43	75	99	154	133
Kazakhstan	...	...	...	...	352	432	495	...	...	...	...	265	357	391
Kyrgyzstan	...	...	2	14	16	7	9	...	...	38	27	52	103	91
Rep. of Moldova	...	...	...	10	43	63	60	...	...	...	51	111	93	103
Russia	...	...	...	3832	3740	3409	3539	...	...	...	2964	3252	2489	3080
Ukraine	...	...	...	1894	2152	4033	4029	...	...	...	244	454	424	476

Source: IMF, Balance of Payments Statistics Yearbook 1998

Table 4: Exports and imports of transport services as percentage of GDP in selected transition economies

Country	1993		1994		1995		1996		1997		1998	
	Export	Import	Export	Import	Export	Import	Export	Import	Export	Import	Export	Import
Bulgaria	4.0	4.7	3.9	4.8	3.8	4.1	4.4	4.9	4.4	5.0	3.7	4.2
Czech Rep.	3.6	2.1	3.1	2.1	2.8	1.5	2.3	1.2	2.5	1.2	2.4	1.1
Hungary	0.2	0.4	0.1	0.5	1.0	0.8	0.9	0.7	1.1	0.9	1.4	1.0
Poland	2.4	1.6	2.6	1.5	2.4	1.4	1.9	1.2	2.2	1.1	...	...
Romania	1.1	1.3	1.3	1.3	1.3	1.7	1.6	2.0	1.7	1.6	1.3	1.7
Russia	...	...	1.4	1.1	1.1	1.0	0.8	0.6	0.8	0.7	1.1	0.9
Slovakia	3.8	2.4	3.9	1.2	3.5	1.8	3.4	2.1	3.8	1.8	3.8	2.2
Slovenia	3.5	3.1	3.4	2.9	2.7	2.3	2.6	2.1	2.6	2.0	2.8	2.1

Source: International Monetary Fund, Balance of Payments statistics, 1995 – 1999.

4. State of infrastructure and challenges

19. The inadequate transport infrastructure inherited from the old central planning system requires enormous investment and continues to impede the development of modern transport services in transition economies. The transitional recession has contributed to a continuous decline in productive capital in the transport sector.⁷

20. The **rail transport** network in many transition economies is relatively dense and enjoys respectable electrification rates, particularly along the major national and international routes. At the same time, its equipment and operational characteristics are inferior to those of western Europe. With few exceptions, railway lines in the region have been designed for low train speed (up to a 100-120 km/h maximum) and are often routed through cities, which makes them both difficult and expensive to modernize. During the period of transition, rail networks have suffered drastic cuts in resources allocated for maintenance; now these allocations do not exceed one fifth of the western European average. As much as 25 per cent of the lines are estimated to be in unsatisfactory technical condition, while the shortage of spare parts and lack of maintenance explain the shortage of operational rolling stock.⁸

21. A general feature of the **road infrastructure** in transition economies is the low density of the motorway network, relatively high traffic densities being confined to certain specific locations within countries. This being said, in central Europe the road network is, overall, in better shape than its counterparts in countries of the former Soviet Union, where the road density is particularly low.

22. In central and eastern Europe, roads are of varying quality but comparable in density with the EU network. The total length of the road network in the six countries of this region is 704,170 km, of which 206,280 km (or 29%) represent highways.⁹

23. Owing to chronic under-investment during the period of transition, the bulk of the existing road network in the countries of central and eastern Europe in its present state cannot cope with strong traffic growth. A survey on highways rehabilitation and maintenance, conducted by the World Bank, has discovered that 82 per cent of the existing road network in the region required substantial renovation,

⁷ European Conference of Ministers of Transport, XIIIth International Symposium on Theory and Practice in Transport Economics, Transport: New Problems, New Solutions, Luxembourg, May 1995.

⁸ See the reports of the European Conference of Ministers of Transport, XIIIth International Symposium on Theory and Practice in Transport Economics, Transport: New Problems, New Solutions, Luxembourg, May 1995; and in THOUVENIN, C., (1992), L'évolution des chemins de fer tchécoslovaques et hongrois, INRETS-DEST, Editions Paradigme, Caen.

⁹ See CHATELUS, G., POINCELET, M., REYNAUD.C., "Economic and Social change: Central and Eastern European Countries, in the European Conference of Ministers of Transport, XIII International Symposium on Theory and Practice in Transport Economics, Transport: New Problems, New Solutions, Luxembourg, May 1995, pp. 103-160.

reconstruction, rehabilitation and/or resurfacing; and very rapid action was required on 41 per cent of the network.¹⁰

24. The situation is even worse in the former Soviet Union, where the motorway network is virtually non-existent, highways serve only the main urban areas, and most of the roads in rural areas are not paved and are highly sensitive to weather conditions.

25. The lack of resources to maintain and modernise the existing transport infrastructure in conjunction with the continuous growth in road freight transport flows can dramatically increase the wear and tear and trigger a rapid deterioration in roads, bridges and other infrastructures. Therefore the rehabilitation and maintenance of road networks in order to avoid substantial additional costs in the medium- to long term, as well as the development of combined transport lines, becomes a priority.

26. Combined transport requires not only specific infrastructure – gantries, transfer terminals, special facilities – but also an efficient logistical organization, which is only embryonic in many countries of the region. The design of an operational model that could compete with road haulage is an important challenge for policy makers, especially in the countries of eastern, central and southern Europe

27. The challenges faced by **civil aviation** in transition economies are similar to those of the transport sector as a whole. Basic airport modernization, especially in southeast Europe and the CIS is required in order to increase traffic safety and security. At the same time, air traffic control (ATC) systems need to be urgently improved in order to enable the growing number of international flights, including those transiting through the region.

28. In broader terms, recent research has shown that improvements in essential transport services is a complex endeavour requiring :

- the modernization of equipment and operating systems;
- introduction of modern information and communication technologies (computer systems, data transmission, new models of operation and traffic management etc.);
- bringing in of effective management tools, decentralization of management in particular;
- simplification of frontier formalities, facilitating transfer and transit.¹¹

29. The assistance from international organizations, such as the UN/ECE can be constructive in reforming transport systems of transition economies. The UN/ECE conventions and agreements on trunk

¹⁰ See European Conference of Ministers of Transport, Transport Infrastructure in central and eastern European Countries, 1995, Paris, p. 105.

¹¹ See conclusions of the European Conference of Ministers of Transport, Transport Infrastructure in Central and Eastern European Countries, 1995, Paris; SUCHORZEWSKI, W. (1993); ATKINS, W. S., (1992); REYNAUD, C., and POINCELET, M., (1992); and COWI Consult (1991).

lines of communication, international railway lines, international combined transport lines, the carriage of dangerous goods and safety and environmental standards are particularly relevant in this context.

30. To summarize, during the 1990s and still today the transport sector has maintained its important position in the economies of central and eastern Europe and the CIS. At the same time, during the period of transition it has undergone dramatic structural changes. These include the redirection of export traffic flows in favour of western Europe at the expense of former Soviet Republics, the increasing role of high value goods as opposed to bulk low value cargos, and the outstanding growth of road transport to the detriment of railroads. The extensive but often inefficient transport infrastructure inherited from the central planning system, further damaged by a decade of under-investment, continues to impede the development of modern transport services in transition economies. International investment coupled with drawing on the world's best practice in the transport sector are required to face the daunting challenge of this sector's modernization.

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