



# HIGHLIGHTS AND CONCLUSIONS



## BLACK SEA RING HIGHWAY CARAVAN

Road Transport Drives Progress From Belgrade to Istanbul

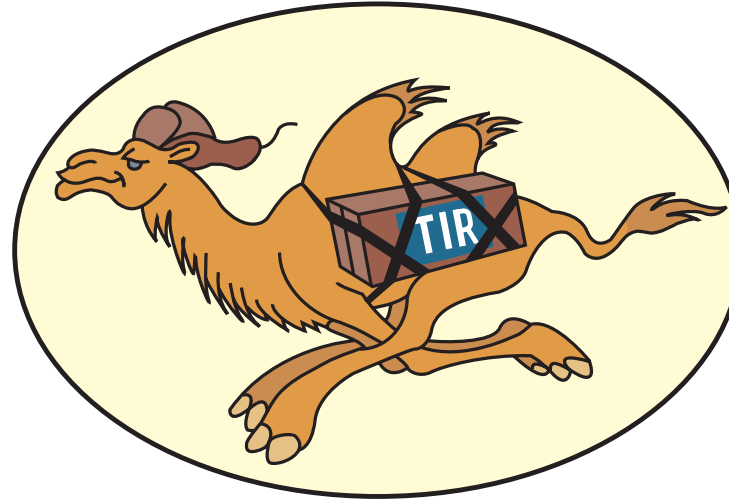


## КАРАВАН ЧЕРНОМОРСКОЙ КОЛЬЦЕВОЙ АВТОМАГИСТРАЛИ

Автомобильный транспорт везет прогресс от Белграда до Стамбула



# Partners





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# Messages



Reliable and sustainable transport services are key to the success of economic progress, prosperity and therefore friendly relations between the countries anywhere in the world including the BSEC region.

It is, therefore, not a coincidence that the BSEC Organisation gives priority to transport issues and tries to build its strategies in a true spirit of public-private partnership.

The BSEC MoU on Facilitation of Road Transport of Goods entered into force on 20 July 2006. This MoU will be the backbone of our future efforts to reduce the non-physical barriers across 12 countries of the BSEC Organization and to harmonise legislation and charges as well as to gradually integrate the BSEC road transport market.

The BSEC MoU on Coordinated Development of the Black Sea Ring Highway is complementary to further facilitate movement of goods and people around the Black Sea basin. It is a basic example for how things will move in the BSEC region in the years ahead: we will concentrate on projects that change the lives of the BSEC people.

As important as these two memoranda, the BSEC MoU on Motorways of the Black Sea will provide guidance to public and private partners in the BSEC region to increase efficiency and quality of the transport services by making use of the Black Sea that links everyone.

We also decided to organise the Black Sea Ring Highway Caravan. It was very difficult to organise it but we did it together with the IRU and BSEC-URTA.

The Caravan promoted the future Ring Highway to our people, identified actual physical conditions of the road infrastructure and examined the non-physical barriers to road transport. All this was done to offer a brighter future for our future generations.

I was very happy to see that the Caravan did not only draw the attention of the BSEC people but the whole international community. There was Caravan news everywhere from Australia to India, from the United Arab Emirates to Ireland.

I also learnt a lot about the substantial role of road transport in our daily lives, and the problems it suffers between our borders.

For the first time in my life, I drove a 17-tonne truck by myself for a few kilometers at the Romania-Moldova border. I joined the Caravan in a truck for nearly 600 kilometers and lived wonderful moments with 12 heroic drivers, who were communicating with each other amazingly well through a mixture of words in German, Russian, Turkish and sign language.

Indeed, we have much to learn from these drivers when tackling the political problems that prevail in our region. This is what our founding fathers wanted from us and that is what we are doing.

On the road ahead, I am sure that a brighter future awaits us and we will get there thanks to a true spirit of public-private partnership, that was created with the Black Sea Ring Highway Caravan.

**Amb. LEONIDAS CHRYSANTHOPOULOS**



The liberalisation of economies, associated with the globalisation of markets, has created a new economy based on the free movement of people, goods, capital, knowledge, technologies and services. These important changes affect not only many rules and legislations, but also the functioning and organisation of public institutions and private businesses.

This force of change is due in part to the economic revolution engendered by the massive, meteoric growth of new players on the market, and to the technological revolution in information technology. It notably affects the services, logistics and transport sectors.

According to available statistics, between 1950 and 2004 the value of world trade rose from 375 billion to 8,200 billion dollars, that is 22-fold or by 5.9% per year during this period.

The BSEC region, composed of 21 Member States from the Adriatic to the Caspian sea, enjoyed an average annual trade growth of more than 31% between 2003 and 2006 compared to the world average of 19%.

This fantastic performance of the BSEC economies, which is at least 50 % higher than the world performance, heavily depends on the new opportunities due to the globalisation of markets and the excellent geo-strategic location of the region among Europe, Asia and the Middle East regions.

Road transport in a liberalised and globalised economy has become an efficient and irreplaceable production tool. As such, any penalty imposed on road transport is an even bigger penalty on trade and the economy as a whole. Thanks to its flexibility and the quality of service offered, road transport, which is accessible to everyone everywhere, remains the best placed

to take on the challenges of sustainable development while at the same time contributing to global economic development.

It is with this common understanding that the IRU has worked together with the BSEC Organisation since many years, to eliminate physical and non-physical barriers to road transport in a true public-private partnership.

Our imminent public-private objectives include gradual liberalisation of the BSEC road transport market by creating a regional quota system similar in nature to the ECMT licences and simplification of visa procedures for professional drivers through a reliable BSEC driver database compatible with the Schengen system.

Thanks to this excellent public-private partnership spirit, the IRU, together with its regional family BSEC-URTA, was honoured to organise the Black Sea Ring Highway Caravan under the patronage of the BSEC Secretary General H.E. Ambassador Leonidas Chrysanthopoulos. The Caravan has been a true experience for our public partners to understand and evaluate better the current physical and non-physical barriers around the Black Sea basin.

What is exciting is that it also marked, historically, the beginning of our long road ahead together with the BSEC Organisation towards a common better future.

MARTIN MARMY



## Messages



## Messages

# IRU



BSEC-URTA, a proud member of the BSEC family as a Sectoral Dialogue Partner, has always been a reliable partner for the BSEC Member States to identify the common problems of the road transport industry and to find agreed solutions to these common problems on the multilateral cooperation level of the BSEC Organisation.

During more than five years since the birth of BSEC-URTA, we have gained important experience to collect regional data about trade and road transport performance in the BSEC region. We have carried out surveys among transport operators, drivers and ro-ro operators.

We have stayed open to cooperation with all public and private partners and followed closely all the developments and activities of other international organisations, which affect our industry with their decisions or activities.

All these experiences and working practices are systematically filtered by the competent BSEC-URTA organs that make sure that our proposals, strategies and work are always driven by a regional private sector consensus behind.

We had achievements in the past, for sure. But we have had big disappointments sometimes, too.

Adoption by the BSEC Member States of the BSEC-URTA time-table with respect to implementation of the BSEC MoU on Facilitation of Road Transport of Goods and the opening to signature of the BSEC Agreement on Simplification of Visa Procedures for Professional Lorry Drivers are some of the major developments in the recent past that give all of us fresh hopes.

In this context, being part of and taking a major role in organising the Black Sea Ring Highway Caravan under the patronage of the BSEC Secretary General H.E. Ambassador Leonidas Chrysanthopoulos has been a historic milestone for the BSEC-URTA, which enabled us to display the excellent level of our solidarity to our public and private partners and also paved the way to a new era in the BSEC Organisation, where, hopefully, our common problems will be still at the political focus of the BSEC Governments for the next few years more.

I think that one would not be wrong to call this new era the BSEC Transport Era.

It is now the time for harder work and we rely on the BSEC and the IRU that we will build a better future together.

VLADIMIR FLOREA



# About the Organisers

Under the Patronage of

Organisers



Leonidas Chrysanthopoulos  
Secretary General



Martin Marmy  
Secretary General



Vladimir Florea  
President



## Participating Associations



Albania



Armenia



Azerbaijan



Bulgaria



Georgia



Greece



Moldova



Romania



Romania



Serbia



Serbia



Russia



Turkey



Turkey



Ukraine



# About the Organisers

## Black Sea Economic Cooperation Organisation BSEC

The Black Sea Economic Cooperation (BSEC) Organisation is a regional economic cooperation organisation bringing together 12 countries contiguous to the Black Sea area. The original step to integrate the Black Sea area to the world economy, to enhance cooperation among its members and to convert this area into one of peace, stability and prosperity, was the Istanbul Summit Declaration and the Bosphorus Statement adopted on 25 June 1995 in Turkey by the Heads of State and Government of 11 countries in the region (Albania, Armenia, Azerbaijan, Bulgaria, Georgia, Moldova, Romania, Russia, Turkey and Ukraine), which gave birth to the BSEC organisation.

Having completed its establishment and consolidation stages in the past, today the BSEC organisation undertakes a new era of result-oriented programs and projects.

This important initiative has also drawn the attention of many other countries. Today 13 countries and 3 institutions have gained observer status to the organisation. With the accession of Serbia in April 2004, the Organisation's Member States increased to 12.

The areas of cooperation of 12 Member States cover mainly trade and economic development, banking, energy, transport, communications, agriculture, tourism and combating organized crime, terrorism and illegal immigration.

## Related Bodies and Affiliated Centres

- Parliamentary Assembly of the Black Sea Economic Cooperation (**PABSEC**)
- BSEC Business Council (**BSEC BC**)
- Black Sea Trade and Development Bank (**BSTDB**)
- International Center for Black Sea Studies (**ICBSS**)
- BSEC Coordination Center for the Exchange of Statistical Data and Economic Information

## Sectoral Dialogue Partners

- Black & Azov Seas Ports Association (**BASPA**)
- Black Sea International Shipowners Association (**BINSA**)
- Black Sea Region Association of Shipbuilders and Shiprepairers (**BRASS**)
- Union of Road Transport Association in the Black Sea Economic Cooperation Region (**BSEC-URTA**)
- International Network for SMEs (**INSME**)
- Regional Commonwealth in the Field of Communication (**RCC**)



## Member States

- Republic of Albania
- Republic of Armenia
- Republic of Azerbaijan
- Republic of Bulgaria
- Georgia
- Hellenic Republic
- Republic of Moldova
- Romania
- Russian Federation
- Republic of Serbia
- Republic of Turkey
- Ukraine

## Observers

- Republic of Austria
- Republic of Belarus
- Republic of Croatia
- Czech Republic
- Arab Republic of Egypt
- Republic of France
- Federal Republic of Germany
- State of Israel
- Republic of Italy
- Republic of Poland
- Slovak Republic
- Republic of Tunisia
- United States of America
- International Black Sea Club
- Energy Charter Secretariat
- Black Sea Commission





## International Road Transport Union

### IRU

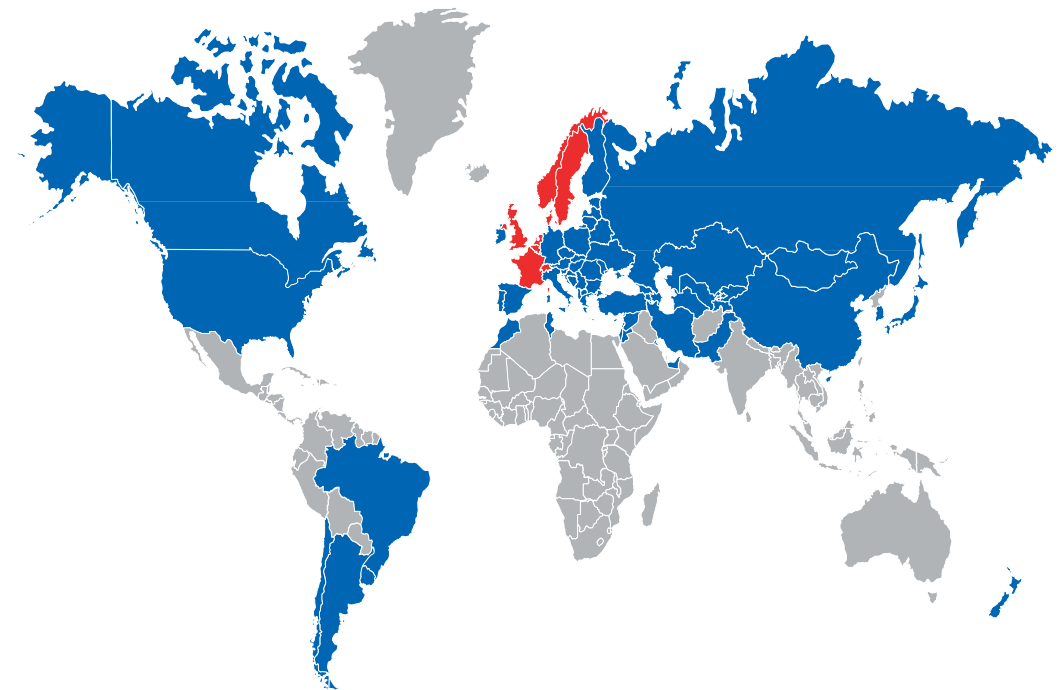
The International Road Transport Union (IRU), founded in Geneva on 23 March 1948, is the international organisation which upholds the interests of the road transport industry worldwide. Via its network of 180 national Member Associations in 70 countries across all five continents, it represents the operators of buses, coaches, taxis and trucks, from large fleets to individual owner-operators.

The IRU, which has a truly global vision, also acts effectively at a national and even local level through its national Members and its slogan: “Working together for a better future”.

The IRU's mission is to facilitate road transport worldwide and, through its training arm – the IRU Academy – to use training to promote professional competence in the sector and to improve the quality of services it offers. It defends customers' freedom of choice between transport modes and the equal regulatory treatment of all modes. It works, with its Members, to ensure the harmonious development of road transport and to improve its image. It represents the interests of the road transport industry to public authorities, private bodies and the media. It promotes cooperation and complementarity with other modes of transport.

The IRU's Constitution obliges it to work towards the twin goals of **Sustainable Development** and **Facilitation** of road transport. These two priority issues form the basic components of its working programme.

## The IRU World Map



Created 1948  
8 Founder Countries

2007  
180 Members  
in 70 Countries

# About the Organisers

## BSEC-URTA Organisation

### COMMON SOLUTIONS TO COMMON PROBLEMS

BSEC-URTA (Union of Road Transport Associations in the Black Sea Economic Cooperation Region) was founded by Associations of International Road Transporters in 11 BSEC member countries from Albania, Armenia, Azerbaijan, Bulgaria, Georgia, Greece, Moldova, Romania, Russia, Turkey and Ukraine, in Antalya, Turkey on 24 October 2001. The official inauguration of the Union was organized during the BSEC Business Council's First International Transport Forum in the same city on 25 October 2001.

In 2006 Medjunarodni Transport in Serbia, Ingosstrakh in Russia and The National Union of Road Hauliers in Romania joined the BSEC-URTA Family as Observers.

The BSEC-URTA has the vision: "Common solutions for common problems!"

Enjoying the BSEC Sectoral Dialogue Partner status since its foundation, the BSEC-URTA shares the goals of the BSEC Organisation, which aims to transform the Black Sea region, through multilateral cooperation, into a region of peace, freedom, stability and prosperity. Therefore, the BSEC-URTA works to provide a private sector contribution to this inter-governmental cooperation process underway around the Black Sea basin which dates back to 1992.

Within this framework the BSEC-URTA has seven strategic objectives with respect to (a) **facilitation** of road transport, (b) contribute to the **IRU-BSEC interaction**, (c) promote **good examples**, (d) **develop** joint **projects** and produce professional information through researches, (e) **lobby** for its common interests and **promote** road transport, (f) work to develop **combined transportation** and (g) **professional training**.

To reach these objectives, the BSEC-URTA works in cooperation with the IRU so that its global experiences and know-how can contribute to BSEC activities.



## A BSEC Initiative

The Black Sea Ring Highway Caravan is the first concrete example of the new face of the project-oriented BSEC Organisation. This project came into being as an initiative of the BSEC Secretary General Ambassador Leonidas Chrysanthopoulos with the full support of the IRU and BSEC-URTA.

## An Exemplary Public-Private Partnership Project

The Black Sea Ring Highway Caravan project also drew the attention of the international community much beyond the BSEC boundaries. Caravan news was diffused in numerous countries stretching between Australia, India, Ireland, the United Arab Emirates, etc. The Caravan film was requested by personalities from far away countries including Myanmar and Thailand to be shown at various local and regional transport and logistics conferences.

The Caravan highlights and scientific conclusions were reported to the meetings of many international organisations including regional commissions of the United Nations that work together for developing inter-regional transport linkages between Asia, Europe and the Middle East.

## Mission

### The Caravan had the mission:

- To promote the future Black Sea Ring Highway to the BSEC people;
- To examine the existing road infrastructure along the agreed Black Sea Ring Highway route, as possible;
- To collect transport-related data about the non-physical barriers to road transport such as border waiting times, customs procedures and controls, road user charges and driver visa requirements, etc.



# About the Caravan



## Black Sea Ring Highway Draft Map

According to the BSEC MoU on Coordinated Development of BSRH its length will be approximately 7,000 km.  
 The main route and its connections may include the following cities:  
 Istanbul (Turkey), Samsun (Turkey), Trabzon (Turkey), Batumi (Georgia), Poti (Georgia), Yerevan (Armenia), Baku (Azerbaijan), Novorossiysk (Russia), Rostov-on-Don (Russia), Taganrog (Russia), Marioupol (Ukraine), Melitopol (Ukraine), Odessa (Ukraine), Chisinau (Moldova), Bucharest (Romania), Constantza (Romania), Haskovo (Bulgaria), Sofia (Bulgaria), Nish (Serbia), Belgrade (Serbia), Tirana (Albania), Edirne (Turkey), Komotini (Greece), Alexandroupolis (Greece), Istanbul (Turkey).  
 The BSRH Steering Committee will elaborate the main route and its connections at a later stage.

# About the Caravan



The Caravan drove a total length of 8,500 km, along the planned route of the future Black Sea Ring Highway.



## Black Sea Ring Highway Caravan Route

## About the Caravan

## Itinerary

Where		When
Country	City	
Serbia	Belgrade	19.04.2007
Albania	Durres	22.04.2007
Greece	Thessaloniki	23.04.2007
Bulgaria	Plovdiv	25.04.2007
Romania	Bucharest	27.04.2007
Moldova	Chisinau	28.04.2007
Ukraine	Odessa	02.05.2007
Russia	Volgograd	08.05.2007
Russia	Astrakhan	10.05.2007
Russia	Makhachkala	11.05.2007
Azerbaijan	Baku	13.05.2007
Armenia	Yerevan	17.05.2007
Georgia	Tbilisi	19.05.2007
Turkey	Trabzon	23.05.2007
Turkey	Samsun	25.05.2007
Turkey	Istanbul	28.05.2007



  Nedim Haxia



  Vyacheslav Melkumian



  Elsan Tofiq Tagiev





  Todor Zlatkov Kocev



  Merab Genguiri



  Theocharis Iordanidis



  Petru Rabdau



  Dumitru Stoian





  Vladimir Girin



  Cedomir Cmokrak



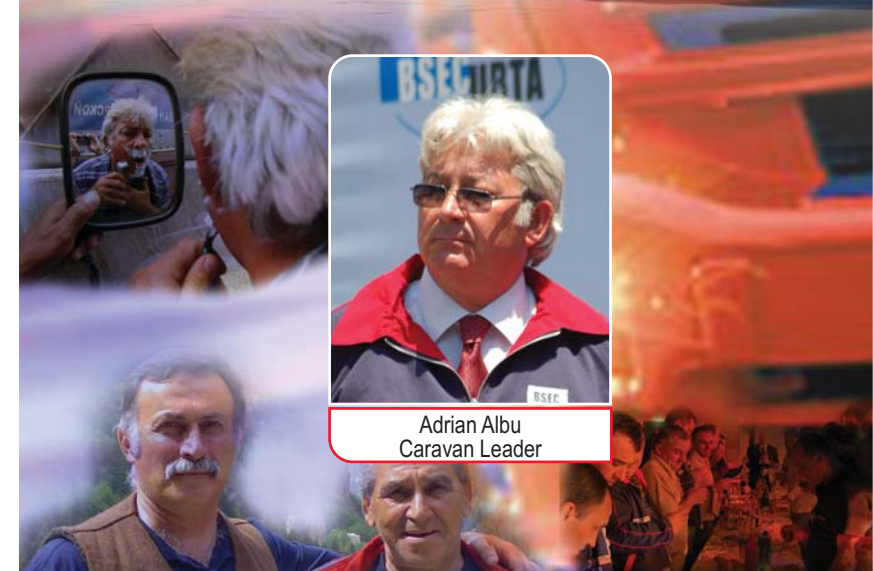
  Özcan Çankaya



  Ivaniv Taras



## About the Caravan



 Adrian Albu  
Caravan Leader



## The Team



Deran Erdem  
Cameraman

# About the Caravan

## Caravan Online

The Caravan was equipped with an online vehicle tracking device, which collected important data about waiting times at borders and movement of the Caravan in the territories of the BSEC Member States.

Visitors were able to track the actual and previous location of the Caravan on the official Caravan web site.



Trip Report							
Company: Black Sea Ring Highway							
Fleet: The Caravan							
Time Span: 23/04/2007 00:00:00 - 31/05/2007 23:59:00							
Start Time	Start Address	Start Km.	Stop Time	Stop Address	Stop Km.	Duration	Distance Km.
<b>348TS08</b>							
23/04/2007 06:43:30	GR Bliisht Florina 2	1,537	23/04/2007 10:41:06	GR Thessaloniki Thessaloniki 26 Oktovriou	1,768	03:57:36	231
23/04/2007 16:50:39	GR Efkarpia Thessaloniki 16	1,768	23/04/2007 17:27:25	GR Nea Magnisia Thessaloniki E86/2	1,810	00:36:46	42
24/04/2007 08:32:31	GR Thessaloniki Thessaloniki 26 Oktovriou	1,810	24/04/2007 08:39:54	GR Thessaloniki Thessaloniki 26 Oktovriou	1,827	00:07:23	17
24/04/2007 12:59:05	GR Liti Thessaloniki E79/12	1,827	24/04/2007 14:34:51	GR Marikostino Serrra E79/63	1,959	01:35:46	132
24/04/2007 14:48:51	BG Marikostinovo Blagoevgrad E79/1	1,959	24/04/2007 15:06:07	BG Marikostinovo Blagoevgrad E79/1	1,960	00:17:16	1
24/04/2007 15:14:36	BG Marikostinovo Blagoevgrad E79/1	1,960	24/04/2007 17:30:58	BG Dragovo Pernik E79/EB71/L/6	2,117	02:16:22	157
24/04/2007 19:05:27	BG Bistrica Sofija E79/EB018,Okolodrasten Pat	2,117	24/04/2007 21:14:25	BG Plovdiv Plovdiv Vladi.vostok	2,280	02:08:58	163
25/04/2007 10:51:27	BG Plovdiv Plovdiv Vladi.vostok	2,280	25/04/2007 10:52:26	BG Plovdiv Plovdiv 6-Ti Septemvri	2,296	00:00:59	16
25/04/2007 17:44:00	BG Plovdiv Plovdiv 6-Ti Septemvri	2,296	25/04/2007 19:02:15	BG Malko Tranovo Stara Zagora E773/66	2,391	01:18:15	95
25/04/2007 19:26:36	BG Kalojanovec Stara Zagora E773/66	2,391	25/04/2007 21:04:55	BG Sipka Stara Zagora E85/5	2,476	01:38:19	85
25/04/2007 22:24:24	BG Etera Gabrovo E85/5	2,476	26/04/2007 00:07:03	RO Biala Buzau E85/2	2,597	01:42:39	121
26/04/2007 01:09:28	BG Bjela Ruzica E85/5	2,597	26/04/2007 02:36:57	RO Giurgiu Giurgiu E70/E85	2,663	01:27:29	66
26/04/2007 02:44:27	RO Giurgiu Giurgiu E70/E85	2,663	26/04/2007 03:19:09	RO Giurgiu Giurgiu E70/E85	2,664	00:34:42	1
26/04/2007 08:05:46	RO Giurgiu Giurgiu E70/E85	2,664	26/04/2007 08:15:48	RO Giurgiu Giurgiu E70/E85	2,664	00:10:02	0
26/04/2007 12:24:09	RO Fratesti Giurgiu E70/E85/5	2,664	26/04/2007 14:41:55	RO Chisina Bucuresti E81/A1,Bulevardul Iuliu Maniu	2,726	02:17:46	62
27/04/2007 16:54:37	RO Chisina Bucuresti E81/A1,Bulevardul Iuliu Maniu	2,726	27/04/2007 21:05:14	RO Maradeni Buzau E85/2	2,856	04:10:37	130
27/04/2007 21:05:15	RO Maradeni Buzau E85/2	2,856	27/04/2007 21:12:29	RO Maradeni Buzau E85/2	2,856	00:07:14	0
27/04/2007 22:14:38	RO Maradeni Buzau E85/2	2,856	28/04/2007 00:04:48	RO Murteni Galati E581/24	2,966	01:50:10	110
28/04/2007 00:04:50	RO Murteni Galati E581/24	2,966	28/04/2007 02:15:12	RO Husi Vaslui E581/24B	3,067	02:10:22	101

[www.BlackSeaCaravan.org](http://www.BlackSeaCaravan.org)



## About the Caravan



**Menno M. Menist**  
Managing Director



### Findings

During the entire journey, the Caravan Leader Adrian Albu was responsible for recording the actual situation in each country corresponding to a series of given parameters with respect to the existing infrastructure quality and standards, waiting times at borders, any related procedures, controls and charges at borders and within the territories of the BSEC Member States.

NEA transport research and training in the Netherlands, as one of the official Caravan Sponsors, carried out a scientific study based on these findings with a view to presenting a complete outlook of the existing infrastructure along the route of future Black Sea Ring Highway as well as calculating the economic cost of border waiting times and non-physical barriers to road transport in the BSEC region.

## About the Caravan

### **The Caravan... Just a Beginning!**

It is the common understanding of all public and private partners of the Black Sea Ring Highway Caravan that the successful completion of this historic Caravan represents only the beginning of their long term close cooperation. Implementation of the BSEC Memoranda on improvement of the infrastructure, facilitation of the procedures and development of combined transportation in the BSEC region as well as the signing and application of the BSEC Agreement on simplification of visas for professional lorry drivers and creation of a regional quota system similar in nature to the ECMT, are the first concrete targets ahead ...

# Trade and Transport in the BSEC Region



# Trade and Transport in the BSEC Region

## Pan European Transport Corridors



## Euro-Asian Transport Corridors



The BSEC Ministers of Transport in Thessaloniki on 28 January 2005 agreed that the development of transport axes connecting the Trans-European Transport Network with the Black Sea infrastructure transport network should be based on the Euro-Asian transport corridors and on the major routes adopted in the framework of the UNECE-UNESCAP Euro-Asian Transport Links Project as well as other international agreements and initiatives;

The development of the Black Sea Ring Highway will be a major step towards the creation of the Black Sea Ring Corridor.

# Trade and Transport in the BSEC Region

## Statistics

The BSEC region plays a major role in bridging the sub-regions of Europe, the Caucasus, Central Asia and the Middle East with far-reaching global transport vision, due to its pivotal location at the heart of historic crossroads.

With a round 400 million people spread onto a vast area, the BSEC annual foreign trade volume is nearly 1,000 billion USD with a big potential for increase as barriers disappear, very rich resources and make a splendid geography waiting to be discovered by world tourism. These opportunities and the new global economy that brings up a multi-regional interdependency make the transport sector the focus of all BSEC activities.

In this respect, the transport sector, particularly road transport, constitutes a strategic component of the BSEC integration process, on national, regional and international levels.

The capacity of the international road transport industry in the BSEC region is estimated to be nearly 142,000 trucks as at the end of 2005.

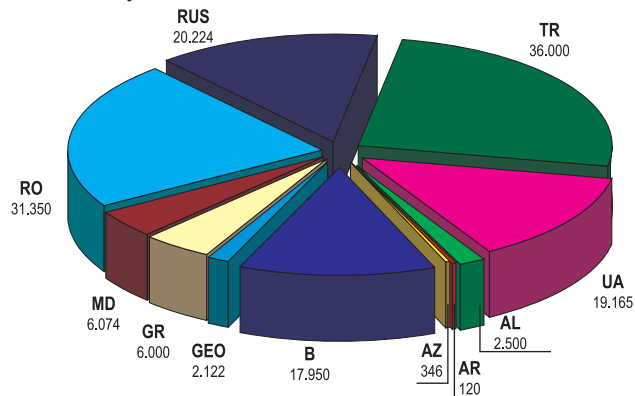


Fig. 1) Distribution capacity of the BSEC region international road transport industry among Member States (as reported by national associations).

	TOTAL	AL	AR	AZ	B	GEO	GR	MD	RO	RUS	TR	UA
#	141.851	2.500	120	346	17.950	2.122	6.000	6.074	31.350	20.224	36.000	19.165

Table 1) Number of trucks involved in international road transport in the BSEC region (as reported by national associations).

The total number of trips carried out by the BSEC fleet only was nearly 3 million in 2006. More than 52% of the total trips were to EU24 (EU countries excluding Bulgaria, Greece and Romania) while 1 out of every 4 trips was undertaken within the BSEC region.

	* 2006	Share
Total number of trips	3.044.743	100,00 %
Trips within BSEC	736.230	25,07 %
Trips to EU24	1.601.940	52,61 %
Trips to Rest of the World	679.573	22,32 %
BSEC/Total	25,07%	

Source:  
BSEC-URTA

(\*) Partial coverage of the BSEC region (AM, GR, SER not included.)

Table 2) Performance of the BSEC international road transport fleet in 2006.

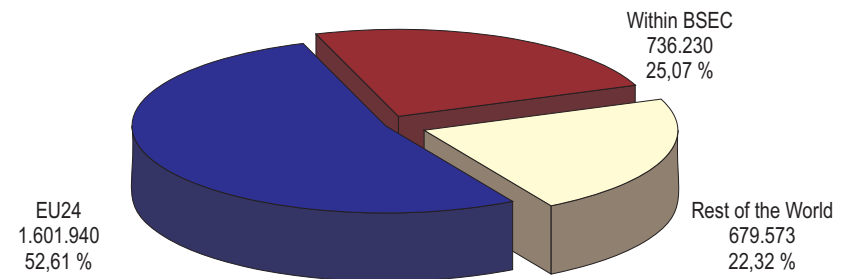


Fig. 2) International road transport trips by the BSEC hauliers in 2006.

Foreign trade of the BSEC countries displays a remarkable growth of 29% in 2004, 22% in 2005 and nearly 24% in 2006.

Another important indicator, which shows the dynamism of the BSEC region, is the foreign trade volume within the region itself. It is observed that the share of internal BSEC trade over the total BSEC trade also rose constantly from 15% in 2003 to 17% in 2006.

# Trade and Transport in the BSEC Region

	2003	2004	% change to	2005	% change to	2006	Change %
Internal Foreign Trade (*)	77,15	107,94	39,91 %	135,71	25,72 %	169,94	25,23 %
Total Foreign Trade (*)	511,67	659,94	28,98 %	805,63	22,08 %	997,241	23,79 %
World Foreign Trade (**)	7682,34	9.123,51	18,76 %	10.393,00	13,91 %	12.062,00	16,06 %
Internal / Total	15,08 %	16,36 %		16,84 %		17,04 %	

Source: (\*) National statistics  
 (\*\*) WTO, International Trade Statistics Database (goods only)

Table 3) BSEC Foreign Trade Performance between 2003 and 2006.

(in billion USD)

## BSEC Foreign Trade

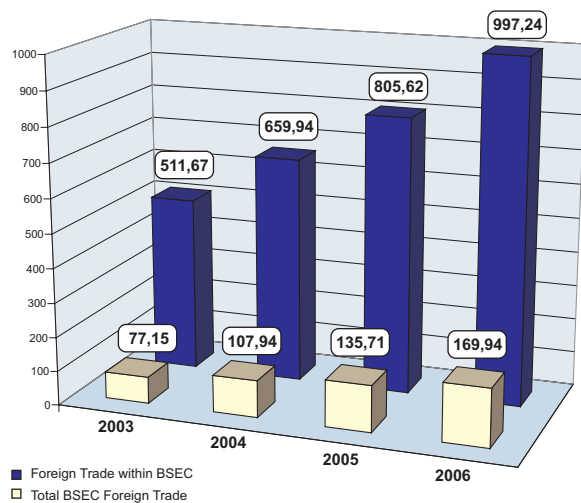


Fig. 3) BSEC Foreign Trade Performance between 2003 and 2006 (in billion USD).

Figure 3 also indicates the rapid growth in the BSEC region and its increasing weight in the world economy as a whole.

## BSEC Internal and Total Foreign Trade vs World Trade in 2006

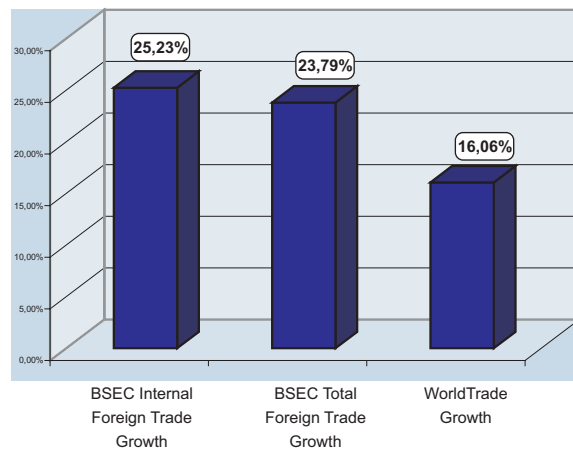


Fig. 4) Comparison of BSEC foreign trade growth with the world trade growth in 2006.

Figure 4 highlights the strength and dynamism of the BSEC trade growth in comparison with the world trade growth. It is noteworthy that the growth of trade between BSEC countries is even higher than the general performance of the BSEC region.

# Trade and Transport in the BSEC Region

## Facilitation

Fully aware of the fact that no economic cooperation process can be successful without efficient transport, particularly without road transport services, the BSEC Organisation has given utmost priority to the facilitation of road transport and development of combined transportation for many years. 2006 and 2007, however, have been the golden years towards turning these objectives into practice and concrete achievements.

### BSEC MoU on Coordinated Development of the Black Sea Ring Highway

BSEC Ministers of Foreign Affairs marked the beginning of a new era for the BSEC people by putting their signature on the MoU on Coordinated Development of the Black Sea Ring Highway in Belgrade on 19 April 2007.

The Black Sea Ring Highway Caravan was also an outcome of this historic development that led to such a successful public-private partnership project.

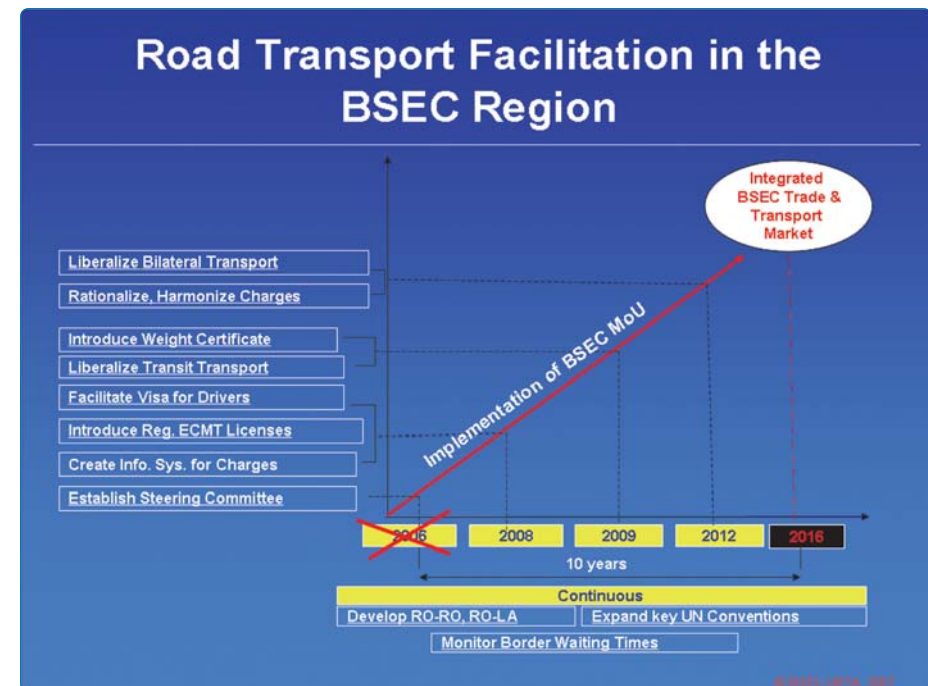
The Steering Committee of this MoU will hold its first meeting as soon as possible in 2007 and a technical secretariat will be established, which will be the driving force behind the realisation of this Highway together with the Black Sea Trade and Development Bank.

### BSEC MoU on Facilitation of Road Transport of Goods

After its signing in March 2002, the BSEC MoU on Facilitation of Road Transport of Goods finally entered into force on 20 July 2006. The BSEC Permanent International Secretariat received the support of all BSEC Member States to implement this MoU as soon as possible.

The Steering Committee of this MoU held its first meeting in Istanbul on 21-22 March 2007. The Steering Committee adopted its Rules of Procedure and an implementation timetable, which was originally proposed by BSEC-URTA.

The implementation timetable targets harmonisation of charges, simplification of visas for professional drivers, expansion of transport-related UNECE conventions and multilateral agreements as well as the elimination of transit quotas by 2009 and bilateral quotas by 2012. The ultimate target is full liberalisation and integration of the BSEC road transport market by 2016.



## Trade and Transport in the BSEC Region

### **BSEC MoU on Motorways of the Black Sea**

In parallel with similar EU efforts and programmes, BSEC is also working for development of combined transportation in the Black Sea region. These efforts are being carried out in coordination with and having the support of the road transport industry, which is seen as the key for success.

In this context, the BSEC Foreign Ministers were welcomed by all stakeholders when signing the MoU on Motorways of the Black Sea in Belgrade on 19 April 2007.

### **BSEC Agreement on Simplification of Visa Procedures for Professional Lorry Drivers**

Another historic decision made by the BSEC Foreign Ministers in Belgrade on 19 April 2007 was the finalisation of the BSEC Agreement on Simplification of Visa Procedures for Professional Lorry Drivers. This Agreement is now open to signature of interested BSEC Member States and represents a big step forward for acknowledgement of the right of professional drivers to obtain long-term multiple entry visas through simplified procedures.

The private partners of the BSEC Organisation, the IRU and BSEC-URTA, fully encourage the BSEC Member States to sign this historic agreement as soon as possible and they remain at the disposal of the BSEC Organisation to contribute to the creation and management of a regional professional driver database compatible with the European Schengen visa system.



# Scientific Conclusions of the Caravan

## Methodology

The NEA Transport Research and Training Centre has made an assessment of the economic costs related to physical and non-physical barriers within goods road transport of goods in the Black Sea area on the basis of the experiences of the Black Sea Ring Highway Caravan.

The barriers identified in the assessment include border delays caused by congestion and administrative procedures, transport permits needed to carry out goods transport by road in the region and visa requirements for drivers.

The costs related to border delays include operational costs (vehicles and personnel), standard business costs (inventory, depreciation, production) as well as business opportunity costs. The costs related to the bilateral transport permit systems in the region include the costs of transport permits as well as administrative costs of companies. The costs related to visas include the costs of the visa and administrative costs for companies.

The findings of the Black Sea Ring Highway Caravan were the main source of information for the assessment, complemented by BSEC-URTA statistics, related transport studies and IRU information on waiting times at borders.

# Scientific Conclusions of the Caravan

## Economic Cost of Border Delays for Road Goods Transport

Direct costs for goods transport related to border delays are higher transport costs, in terms of time-related vehicle and personnel costs. Indirect costs related to border delays consist of opportunities to reorganise the distribution and logistics processes. These opportunities, especially in the fields of depot structures and inventory size, are now lost, due to longer and maybe even more important, unreliable transport times. Earlier studies<sup>1</sup> show that on average, total (direct and indirect) costs of barriers within road transport are about twice the direct costs.

On the basis of earlier studies on operational costs of European hauliers<sup>2</sup> the average operational costs of waiting times for hauliers active in the region is estimated at €23.5 per hour. Given the more than 2 million trips within the region in 2006, the total waiting time at borders in the region is estimated at more than 4.4 million hours. The following table shows the results:



Direct costs of waiting time at borders in the BSEC region	<b>€ 104 million</b>
Total costs (direct + indirect) of waiting time at borders in the BSEC region	<b>€ 208 million</b>

1- Economic Cost of Barriers to Road Transport, Hague Consulting Group, 1998

2- Cost comparison and cost developments in the European road haulage sector, NEA Transport research and training, 2007

# Scientific Conclusions of the Caravan

## Economic Costs of Transport Permits

There are complex systems of transport permits required to make trips in the Black Sea region based on the results of bilateral negotiations between the countries involved. Many countries request trip permits from foreign hauliers, varying from bilateral permits to transit permits and third country permits, in some cases valid for one trip, in other cases valid for a certain period of time.

These permits have to be purchased by hauliers, with prices ranging from €5 up to €100. The direct costs associated with the permit systems include the costs of purchasing the permits and the related administrative costs. Indirect costs include the costs for the lack of permits in some countries which may lead to a situation in which certain transports are not carried out. The indirect costs have not been calculated.

Based on the number of trips made in the region in 2006, the average price of transport permits, and an estimated 10% for administrative costs, the direct costs related to transport trip permits can be estimated at:

Direct costs of transport trip permits	<b>€ 11 million</b>
--	---------------------



# Scientific Conclusions of the Caravan

## Economic Cost of Visa Requirements and Procedures

In addition to the complex transport permit systems in the Black Sea region, there are also complex visa systems for truck drivers. Requirements for obtaining visas vary greatly per country, as do the procedures and especially the amount of time needed to acquire a visa, type of visa and visa costs.

Direct costs related to the visa systems include the costs of the visa themselves and the related administrative costs. Indirect costs include costs associated with delays in obtaining a visa and often complex procedures which in many cases interfere directly with the execution of transports. Indirect costs have not been calculated.



Direct costs of visas for drivers	<b>€ 10 million</b>
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# Scientific Conclusions of the Caravan

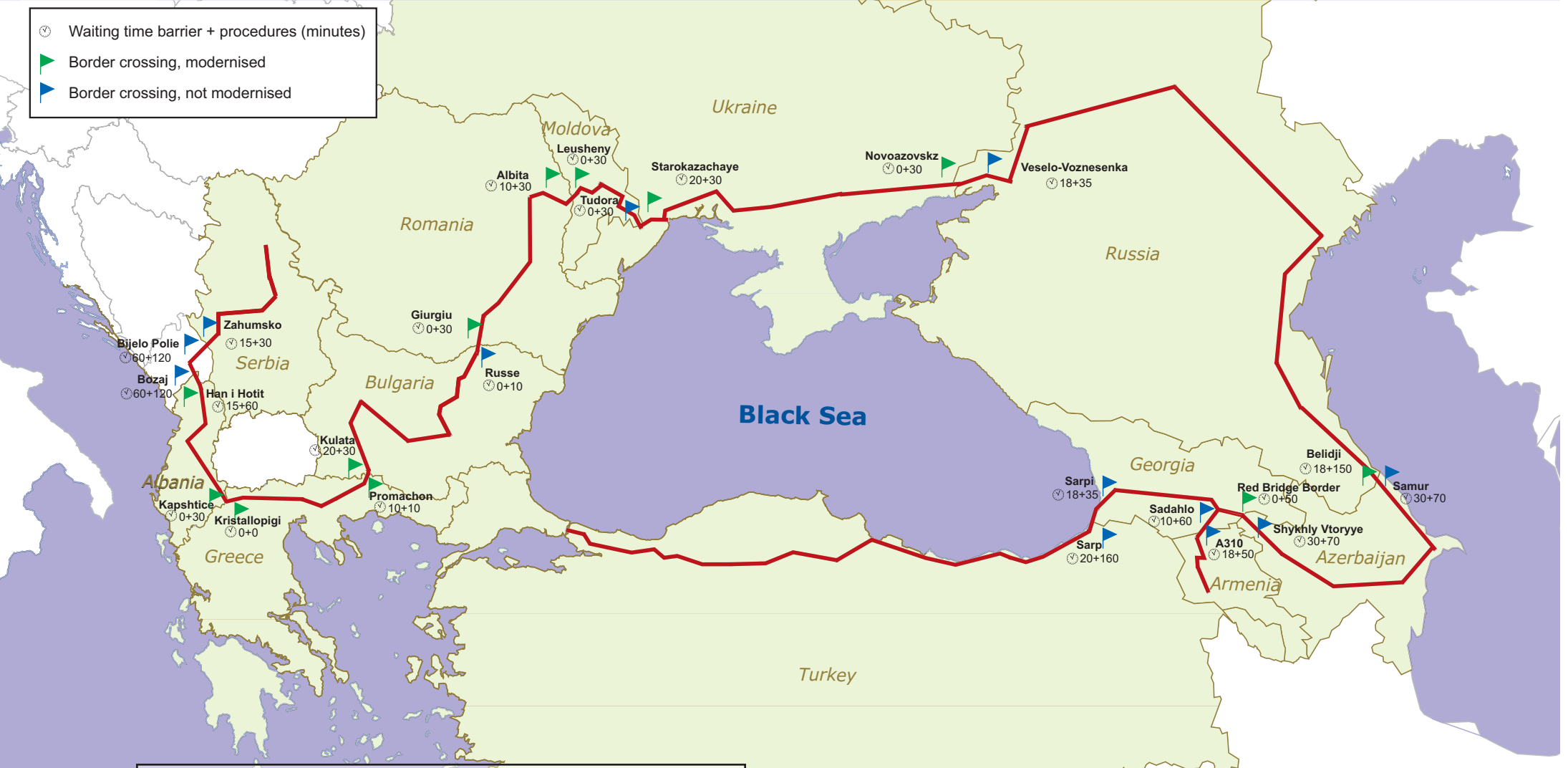
## Principal Conclusions

Barriers in the form of border delays, visa requirements and procedures and the current bilateral transport permit systems account for a sizeable component of freight expenditure. Summarising for the Black Sea area, NEA transport research and training estimated the annual costs of these barriers within the BSEC region to the international road transport and therefore to the BSEC economy as a whole, at:

Total costs (direct + indirect) of waiting time at borders in the BSEC region	<b>€ 208 million</b>
Direct costs of transport trip permits	<b>€ 11 million</b>
Direct costs of visa for drivers	<b>€ 10 million</b>
<b>TOTAL COST OF BORDER DELAYS IN THE BSEC REGION</b>	<b>€ 229 million</b>




- ⌚ Waiting time barrier + procedures (minutes)
- ▶ Border crossing, modernised
- ▶ Border crossing, not modernised



**Waiting time at borders (congestion and custom procedures for each side of border), and qualification of border crossing facilities (modernised, not modernised).**

The map shows the waiting time at each side of the border broken down into congestion and customs procedures. The longest waiting times were noted in the east of the Black Sea region. The map also shows whether or not a border crossing point has been modernised or not.

Source: NEA



## Scientific Conclusions of the Caravan

# Number of lanes on the existing Black Sea Highway Caravan Route

**Roads - number of lanes**

- 4 lanes
- 2 lanes (4 lanes under construction)
- 2 lanes
- no information

**Stops along the route**

- Border crossing
- Stop



- 1- Zahumsko - Bijelo Polje
- 2- Bozaj - Han i Hotit
- 3- Kapshtice - Kristallopigi
- 4- Promachon - Kulata
- 5- Russe - Giurgiu
- 6- Albita - Leusheny
- 7- Tudora - Starokazachaye
- 8- Novoazovskz - Veselo-Voznesenka
- 9- Belidji - Samur
- 10- Shykhly Vtoryye - Red Bridge
- 11- Sadahlo - A310
- 12- Sarpi - Sarp

The map shows the number of lanes on the Black Sea Highway Ring route taken by the Caravan. Much of the Highway Ring consists of 2 lane roads although some parts are currently being upgraded to 4 lanes.

Source: NEA



## Scientific Conclusions of the Caravan

# Farewell Ceremony



BLACK SEA RING HIGHWAY CARAVAN





En route...



BLACK SEA RING HIGHWAY CARAVAN



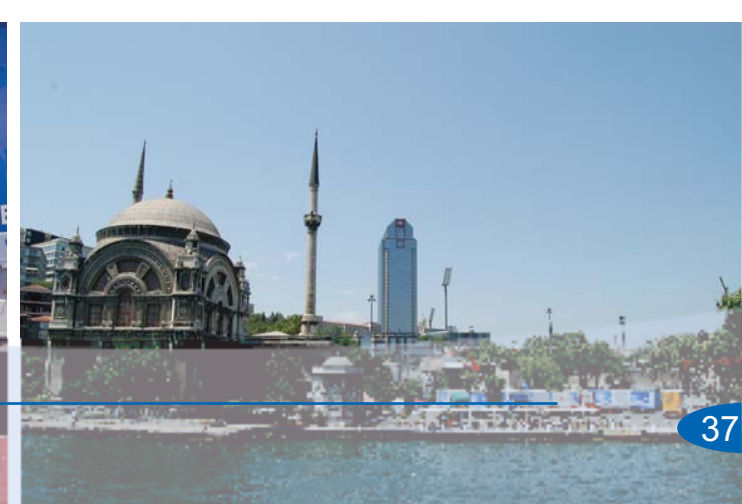
HIGHLIGHTS AND CONCLUSIONS

En route...



BLACK SEA RING HIGHWAY CARAVAN

# Arrival Ceremony





08:12

# Caravan on TV

**HABER KEI TOPLANTISI**  
GÜL: "AB İLE ORTAK ÇALIŞMALARLA HIZ VERMELİYİZ"



**TIR KERVANI İSTANBUL'DA**  
39 GÜNDE 905 KM KAT EDEREK 12 ÜLKE GEZDİLER



## KARADENİZ RİNG OTODOLU

BELGRAD ROSTOV  
BUDAPESTE  
MAKEDONYA İSTANBUL BAKU  
**TIR KERVANI YOLA ÇIKIYOR**  
KARADENİZ RİNG OTODOLU KERVANI PROJESİ  
KEİ ÜYESİ 12 ÜLKEYİ DOLAŞACAK  
NTV  
08:10



**LEONIDAS HRISANTOPOLUS**  
SECRETAR GENERAL OCEMN



**ГЕОРГИ САНДРОВИЧ**  
ДИРЕКТОР НА СЪЮЗНО-ИЗТОЧНО-ЕВРОПЕЙСКИ  
ОТНОШЕНИЯ



**Εμμανουέλα Αγγούρακη**  
ΕΠΙΘΕΛΙΑ  
**ΟΔΟΠΟΡΙΚΟ ΣΕ ΒΑΛΚΑΝΙΑ - ΕΥΞΕΙΝΟ ΠΟΝΤΟ**



**IRINA VELJKOVIĆ**

DRAGAN KAMČIĆ İZABRAN ZA PREDSEDNİKA KOŠAR



**ΕΥ. ΣΤΥΛΙΑΝΙΔΗΣ**  
ΥΠΟΥΡΓΟΣ ΕΞΩΤΕΡΙΚΩΝ  
**ΟΔΟΠΟΡΙΚΟ ΣΕ ΒΑΛΚΑΝΙΑ - ΕΥΞΕΙΝΟ ΠΟΝΤΟ**



**VASILE URSU**  
MINISTRUL TRANSPORTURILOR SI GOSPODĂRIEI  
DRUMURILOR



**ΓΙΩΡΓΟΣ ΑΝΕΣΤΙΔΗΣ**  
Ελληνας Οδηγός



**KARADENİZ ÇEVRE OTODOLU**  
39 GÜNDE 905 KM KAT EDEREK 12 ÜLKE GEZDİLER



**TIR KERVANI İSTANBUL'DA**  
39 GÜNDE 905 KM KAT EDEREK 12 ÜLKE GEZDİLER



**KARADENİZ TIR KERVANI**  
12 ÜLKE DEN TÜRLER KARADENİZİN ÇEVRESİNİ DOLAŞIYOR



Novi evra za članice: Leonidas Hrizantopoulos, Sergej Lavrov, Vuk Drašković i Abdulah Gul



ender za izgradnju dela... lora 10 od Leskovca do... donske granice mogao... de raspisan već na leto... de sa sufinansir... kat, spremna je da... deo svoje pomoći od... na evra koji su već u... di u Beogradu - rekao... e zamenik ministra... ranih poslova Grčke... pidis Stilianidis.



# Caravan in the Press

## Belgrad'dan Istanbul'a 7500 km

Karadeniz Ekonomik İşbirliği Dışişleri Bakanları tarafından 19 Nisan 2007 tarihinde Belgrad'da düzenlenen resmi bir törenle uğurlanan KEİ Karadeniz Çevre Otoyolu Tır Kervanı, geçtiği güzergah boyunca KEİ halklarına gelecekte inşa edilecek olan Çevre Otoyolu'nu duyurdu. Kervan, KEİ bölge ülkeleri için taşımacılığın yaşadığı sorunların karşılanması için...

### Gradi se autoput oko Crnog mora



Ministri zemalja članica BSEC-a 19. aprila potpisali memorandum o saradnji...

razvoju regiona i čine Organizaciju za crnomorsku ekonomsku saradnju (BSEC) levantnom za njene građane je Hrizantopoulos.

Srbija je juče i zvanično dobila mandat predsedavajućeg Otokom, a Vuk Drašković je najavio da će predstojeći samit BSEC u junu 2007. u Istanbulu biti ujedno i prvi ministarski sastanak u okviru ministarskih sastanaka u Palati federacije...

### od juče predsedava Turska



U okviru ministarskih sastanaka u Palati federacije u Beogradu je juče održan 16. sastanak ministara inostranih poslova...

### Evro blizu...



### Marko: Čestitka našim firmama

Marko je izjavio da je zadovoljan uspehom naših firmi u inostranstvu...

### Pvks hote...

Pvks hotele su se pripremili za predstojeći turistički sezona...

## ТЪЛГАРСКИ ТРАНСПОРТЕН ВЕСТНИК

София, година XIV, брой 17 (555) 3 май 2007, цена 1 лв.

### Международният автомобилен керван спря в Пловдив



На 25 април 2007 г. 13-ият международен автомобилен керван...

### KEI Kervani, 40 gün sonra yurda döndü

İstanbul - DÜNYA Karadeniz Ekonomik İşbirliği Örgütü (KEİ) Karadeniz Çevre Otoyolu TIR Kervanı, 19 Nisan'da Belgrad'da başlatıldığı yollukculuğuna dün İstanbul'da sonlandı.

## Karadeniz Otoyolu TIR'ları İstanbul'da

KARADENİZ Çevre Otoyolu'nun halklarına anlatmak amacıyla 10 gün süreyle Belgrad'dan yola çıkan Karadeniz Ekonomik İşbirliği Örgütü (KEİ) Karadeniz Çevre Otoyolu TIR Kervanı, İstanbul'da 19 Nisan'da sonlandı.

Novinari... izveštavanje je s... federacije za... truko otežani... kada je Savet... obezbeđena me... ta, niti prevod n...



Belgrad, 19. aprila 2007. godine. Ministri zemalja članica BSEC-a...

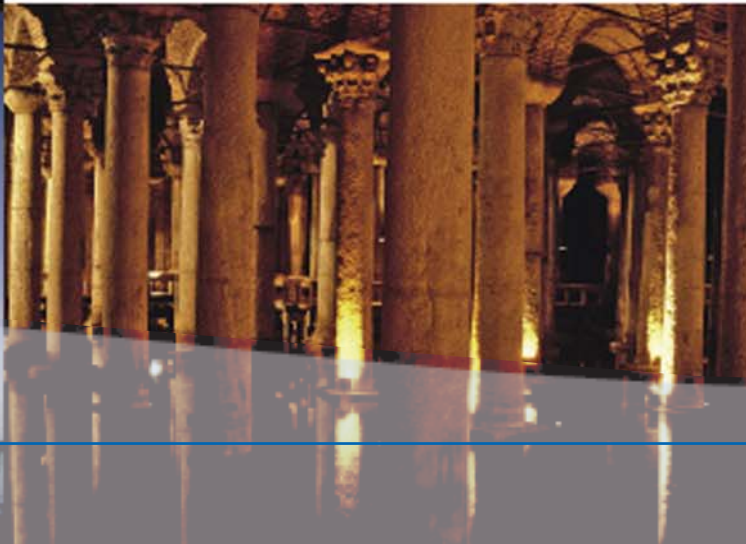
# 31<sup>st</sup> IRU World Congress

Road Transport, Driving Peace and Prosperity!

Istanbul, 15-16 May 2008







HIGHLIGHTS AND CONCLUSIONS

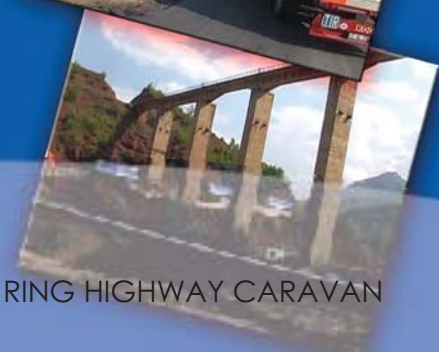
# BLACK SEA RING HIGHWAY CARAVAN

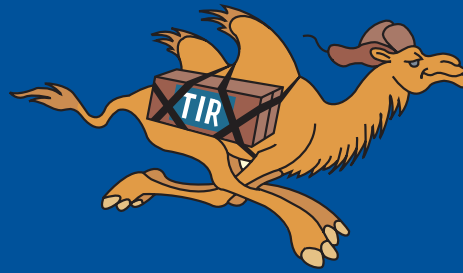
Road Transport Drives Progress From Belgrade to Istanbul



## КАРАВАН ЧЕРНОМОРСКОЙ КОЛЬЦЕВОЙ АВТОМАГИСТРАЛИ

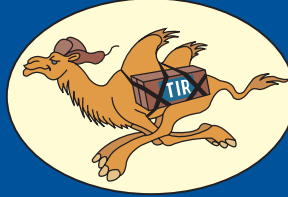
Автомобильный транспорт везет прогресс от Белграда до Стамбула





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Black Sea Ring Highway Caravan - 2007

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