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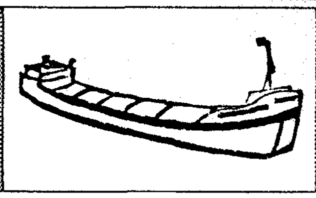
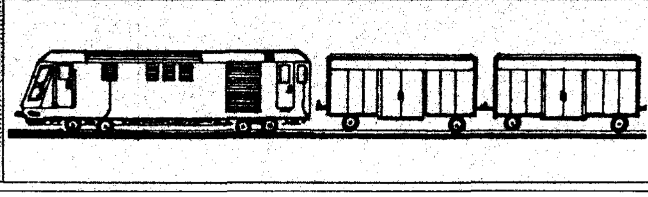
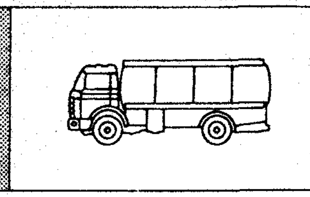

OBSERVATION OF THE TRANSPORT MARKETS

MARKET DEVELOPMENTS

10

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PRESENTATION OF THE REPORT

The EUROPA TRANSPORT publications, which report the results of the Observation of the Transport Market System, were restructured in 1982. Under the umbrella title of EUROPA TRANSPORT, the following three reports are published:

- Analysis and Forecasts
- Annual Report
- Market Developments

The contents of this report (Market Developments), which is published quarterly, has been extended to cover the following subjects:

- recent developments in the goods transport market between Member States by road, rail, inland waterway and combined transport;
- the results of quarterly opinion surveys carried out among international road hauliers;
- the results of six-monthly cost surveys carried out among international road hauliers;
- the results of quarterly price surveys carried out among international road hauliers;
- the results of quarterly opinion surveys among inland waterway operators on two international networks, i.e. the Rhine and the North/South (North/South being inland waterway flows between the Netherlands, Belgium and France, but excluding traffic via the Rhine);
- the results of six-monthly cost surveys carried out among international inland waterway carriers;
- the results of quarterly price indices for international rail movements.

The surveys are undertaken by various organisations in the Member States; the list of these organisations is given in Annex 1.

SECTION 1

GENERAL SUMMARY

International transport activity by road and inland waterway improves slightly ; rail still decreasing.

General trends in activity

The total tonnage moved for all three modes in the second quarter 1983 was up 0.7% on the same quarter of the previous year. This is the first positive result since the first quarter of 1982.

In the first half year 1982 total transport activity measured in tonnes moved decreased by 0.5% compared to the first half 1982. By mode the developments were as follows:

	Q2 83/Q2 82	first half 83/first half 82
Road	+3.5%	+3.5%
Rail	-9.4%	-13.8%
Inland waterway	+1.6%	+0.5%

Results of the transport inquiry survey indicate that during the third quarter 1983 - apart from the normal seasonal decline (summer holidays) - the slightly positive trend for road and inland waterways continued.

Forecast for the fourth quarter 1983 indicates a seasonal upturn and a slightly rising trend for these two modes. Inland waterways transporters expect to benefit from temporary low waterlevels on the Rhine.

Indications on rail transport activity during the third quarter 1983 shows a decrease of about 4% on the same period of last year, which was in itself at an all time low, down nearly 22% on Q3 1981.
However, container traffic increased by 11% during the third quarter 1983 compared with the same quarter last year. For the whole of 1983 a 6% increase on 1982 is expected for this type of traffic. Piggyback transport developments are also positive.

Price developments

In this issue, price indices are published for transports by road and rail.

Average road prices in national currency rose by 4.9% during the third quarter for Belgian and Luxembourg hauliers, German hauliers are almost static, while for Dutch hauliers their was a small fall.

Rail price indicators show a 2% increase Q3 over Q2 for the relation France to Belgium, 0.6% from France to Italy, 0.3% from France to Germany and a stable average price level from Italy to France.

If a comparison is made between the second quarter 1983 and the same quarter last year the following price increases in national currency could be noted:

France to Italy	: 19.8%
Italy to France	: 13.5%
France to Belgium	: 10.9%
Germany to France	: 5.5%
France to Germany	: 4.7%

Cost developments

For the first time this issue containers cost indices for inland waterways. Seperate indices are published by market, by shiptype and by flag, as well as indices of cost elements such as fuel, wages and capital costs. Cost indices for road are also incorporated in the report.

Cost indices by nationality of the transporter in national currency on 1.7.1983 (1.1.1982=100) show the following results.

	Road	Inland waterway
Belgium	111.2	105.3
France	121.1	111.7
Germany	102.5	102.7
Netherland	100.8	100.3

For all these countries except for French road transporters fuel cost are below the level of 1.1.1982.

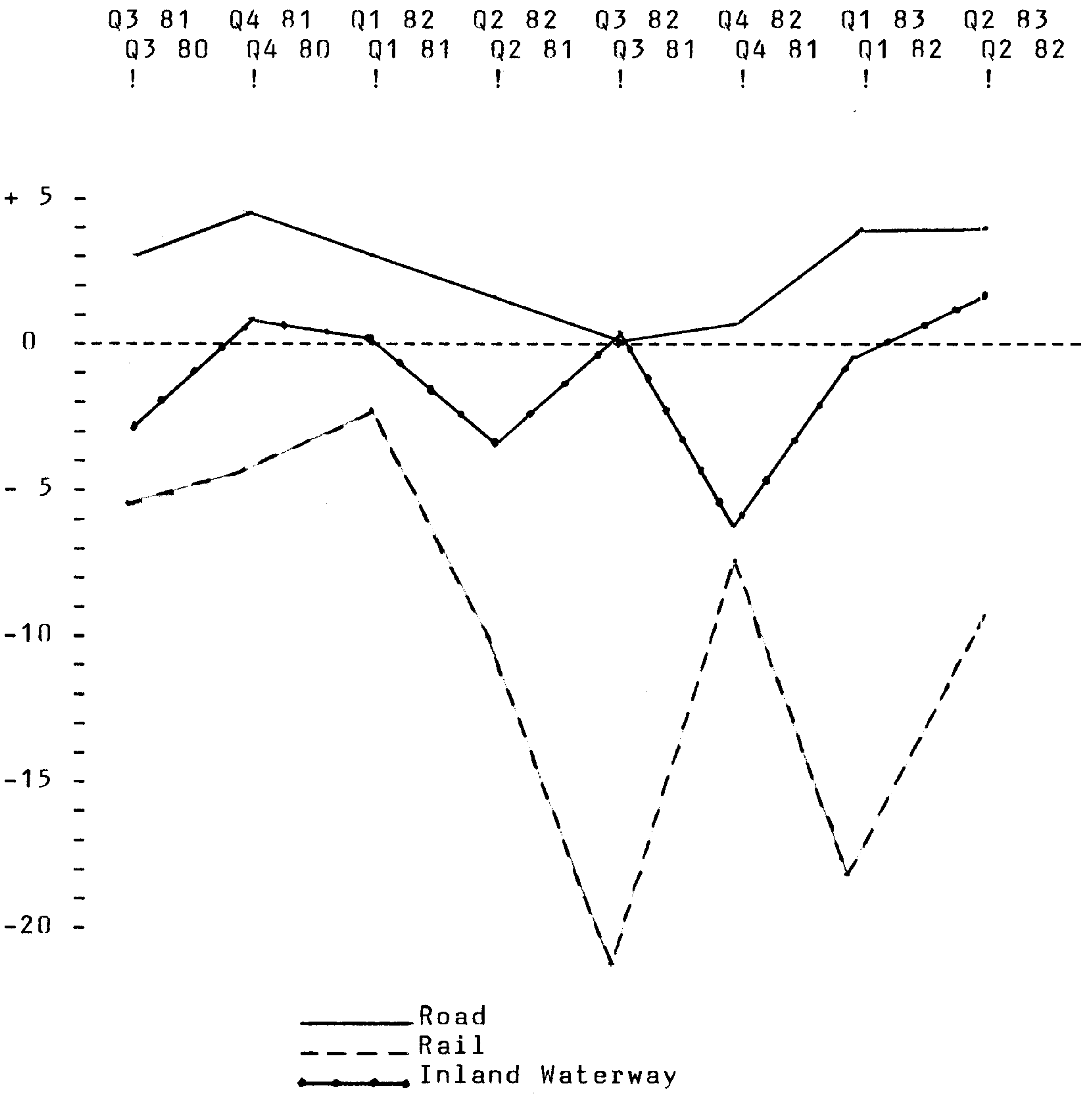
SECTION 2

GENERAL MARKET ASSESSMENT

2.1. Recent trends

The total tonnage moved for all three modes in the second quarter of 1983 was up 0.7% on the same quarter of the previous year. This is the first positive result since the first quarter of 1982. Road registered the same improvement shown in the first quarter of 1983, rail improved somewhat on the previous quarter but was still strongly negative, while inland waterways continued to improve returning the best figure recorded since this series of reports began in 1981.

Figure 2.1.



2.1.1. The trends for individual modes are shown in table 2.1.

Table 2.1.: Growth rates by mode of transport (percentage change of a particular quarter on the corresponding quarter of the previous year).

Year / Mode	Q3 81 / Q3 80	Q4 81 / Q4 80	Q1 82 / Q1 81	Q2 82 / Q2 81	Q3 82 / Q3 81	Q4 82 / Q4 81	Q1 83 / Q1 82	Q2 83 / Q2 82
Road	+2.0	+4.2	+2.9	+1.3	0.0	+0.4	+3.6	+3.6
Rail	-5.7	-4.6	-2.7	-10.2	-21.9	-7.8	-18.3	-9.4
I.W.	-3.0	+0.8	+0.1	-3.9	+0.1	-6.7	-0.5	+1.6
Total	-1.6	+1.2	+0.6	-3.0	-3.1	-4.1	-1.7	+0.7

2.1.2. Modal split

In the second quarter of 1983, road and inland waterways again increased their respective shares at the expense of rail.

Table 2.2. International EUR-7 (1) in million tonnes (2)

Mode	Q2 83	Q2 82	% Change	Modal share
Road	42.3	40.9	+3.6	41.0
Rail	14.3	15.7	-9.4	13.8
I.W.	46.7	46.0	+1.6	45.2
Total	103.3	102.6	+0.7	100

2.2. Modes

2.2.1. Road

Road maintained its improvement in the second quarter of 1983, 3.6% up on the same quarter of last year, the same percentage registered in the first quarter of 1983. This was despite negative figures on some of the relations with high tonnage movements, e.g. France to Germany, Belgium/Luxembourg to France, Germany to the Netherlands.

(1) EUR-7 refers to Germany, France, Italy, the Netherlands, Denmark and the Belgium/Luxembourg Economic Union.

(2) Because of the strong seasonality of traffic, its evolution is monitored by comparing the results of a quarter with the corresponding quarter of the previous year.

2.2.2. Rail

In the second quarter of 1983, rail improved significantly on the figures for the first quarter, but was still nearly 10% down on the second quarter of 1982. The tonnage moved from France to Germany was down over 26% of the amount registered in the second quarter of 1982 while, in contrast, the Netherlands to Germany relation was up over 32% for the same period.

2.2.3. Inland Waterways

This mode has shown, in the second quarter of 1983, the greatest improvement since this series of reports began. The most important relation, Netherlands to Germany, was up 1% on the second quarter of 1982, but the second biggest relation, Germany to the Netherlands, was down nearly 8%. This was also the largest drop of all the inland waterway relations.

2.3. United Kingdom, Ireland and Greece

2.3.1. United Kingdom

Road goods vehicle units carried on Ro/Ro ferries to mainland Europe during the second quarter of 1983 amounted to 191,500, 9% higher than the second quarter of 1982 and 3% up on the previous quarter. Powered vehicles accounted for 49% of the total, down on both the previous quarter (51%) and the second quarter of 1982 (51%). Nearly 53% of the powered vehicles were UK registered.

2.3.2. Ireland

The Irish freight market continues to have problems of cash-flow, depressed demand, rising costs and haulage prices which are generally considered inadequate. In the meat market the share of export traffic dropped to its lowest level for at least two years, while dry goods traffic share of exports has risen to its highest level in this period.
A significant increase in meat exports to France, Germany and non-EEC countries is expected, as well as in general imports from France and Italy.

2.3.3. Greece

For the second quarter of 1983, imports were some 15% up on the corresponding quarter of the previous year, principally from Germany and Belgium. Exports also increased significantly, 35% up on the second quarter of 1982. The main produce exported was fruit and vegetable. Germany alone accounted for 8% of this 35% increase in total road exports.

SECTION 3

ROAD

3.1. Road Inquiry Survey

3.1.1. Summary of Activity Indicators (Figure 3.1., Tables 3.1. and 3.2.)

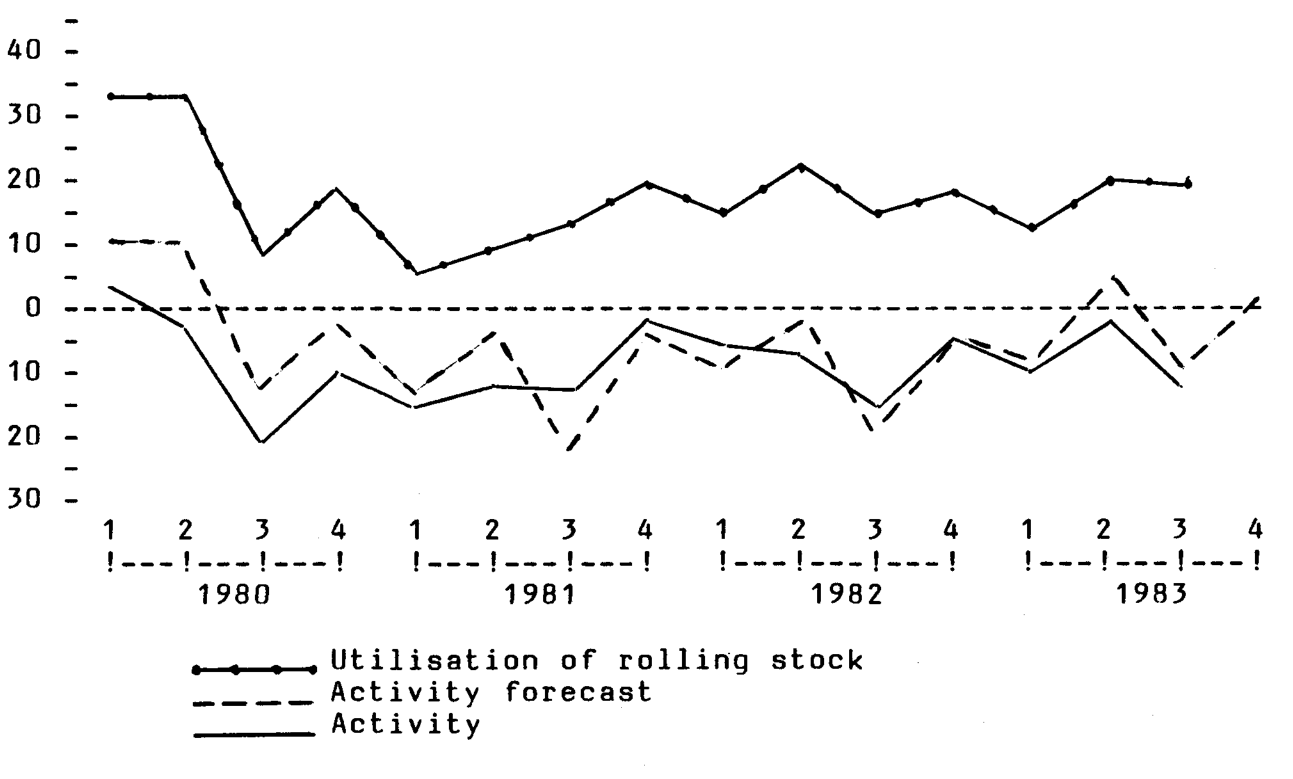
Road transport improves

The inquiry for the third quarter of 1983 indicates a decline in the level of activity on the previous quarter. This decline had been forecast in the previous report, n°9.

Indeed, the balance of opinion was at -10 for the activity forecast for the third quarter and must be compared with the balance of opinion of -13 for actual activity in this quarter.

Compared to the third quarter of 1982 there appears to be a marginal improvement.

Figure 3.1. Activity Indicator : Global balance of opinion (in percentage)



3.1.2. Activity : Decrease

For the third quarter of 1983, the balance of opinion (% difference between positive and negative replies) decreased by 11 points (from -2% to -13%) in comparison with the previous quarter.

3.1.3. Forecasts : Seasonal improvement

The forecasts for the fourth quarter show an improvement which is due to a large extent to seasonal factors.

However, since the balance of opinions is 3 points higher than for the corresponding quarter last year, one can believe that there is also a positive trend-movement in it.

Only in the case of France is a further weakening of the market expected. The balance of opinion is positive in all countries with the exception of France (-41%) and Italy (-3%).

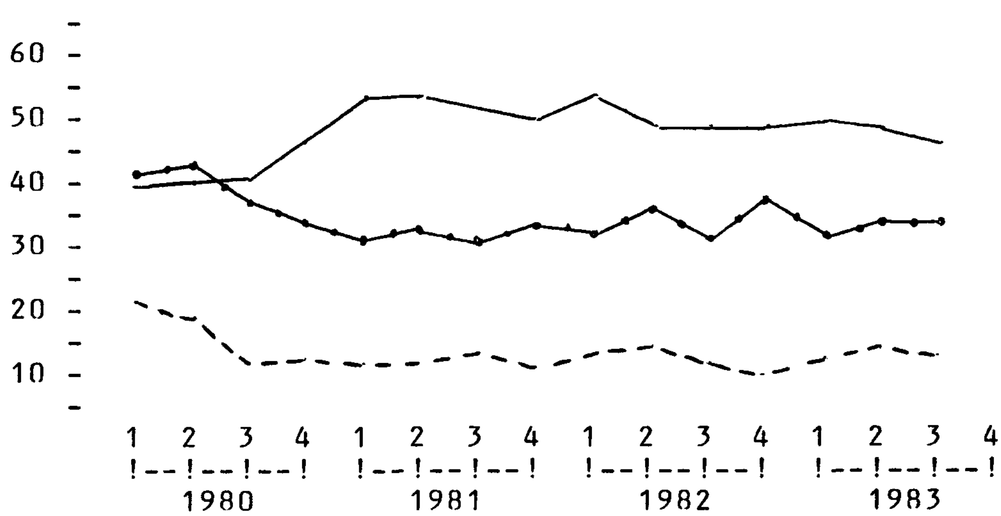
3.1.4. Utilisation of rolling stock

The overall balance of opinions remains at about 18-19%. However, the balance of opinion in some countries was much higher: the Netherlands (42%), Belgium (45%) and the UK (49%).

3.1.5. Summary of economic indicators (Figure 3.2., Tables 3.3., 3.4., and 3.5.)

All the economic indicators remain relatively stable in comparison to the previous quarter.

Figure 3.2.: Economic Indicators



——— percentage of firms indicating having had liquidity problems

—•—•— percentage of firms indicating having made investments

– – – – percentage of firms indicating having recruited drivers

3.1.6. Recruitment : Status quo

The percentage of firms having recruited drivers is 1 point lower than the previous quarter and now stands at 14%. In Ireland the recruitment level increased from 15 to 27%.

3.1.7. Cash-flow problems : Improvement

At 46% the percentage of firms facing cash-flow problems has declined in comparison to the last quarter. Compared to the third quarter last year the situation has improved by 3%.

In Greece (76%), Italy (68%), and France (59%) the cash-flow problems are severe.

3.1.8. Investments : Status quo

As was the case last quarter, 35% of the hauliers declared having made investments. In the UK (68%) and Denmark (51%) the majority of hauliers has invested.

Table 3.1.

ECT-0310 — INTERNATIONAL TRANSPORT BUSINESS ACTIVITY — 3rd quarter 1983 — Forecast: 4th quarter 1983

PAYS		1980				1981				1982				1983			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	+	20	18	15	16	20	18	19	20	22	19	18	23	23	24	21	16
	=	56	54	45	51	46	54	48	49	49	55	44	44	48	45	48	69
	-	24	28	40	33	34	28	33	31	29	26	38	33	29	31	31	15
	S	-4	-10	-25	-17	-14	-10	-14	-11	-7	-7	-20	-10	-6	-7	-10	1
FRANCE	+	30	22	18	14	16	14	16	21	18	15	14	15	14	15	11	7
	=	48	51	50	49	41	47	47	47	47	49	50	43	43	49	47	45
	-	22	27	32	37	43	39	37	32	35	36	36	42	43	36	42	48
	S	8	-5	-14	-23	-27	-25	-21	-11	-17	-21	-22	-27	-29	-21	-31	-41
ITALIA	+	20	25	16	14	15	15	17	18	15	16	14	15	14	15	17	22
	=	53	45	44	41	41	44	42	53	49	47	41	51	45	54	47	53
	-	27	30	40	45	44	41	41	29	36	37	45	34	41	31	36	25
	S	-7	-5	-24	-31	-29	-26	-24	-11	-21	-21	-31	-19	-27	-16	-19	-3
NEDERLAND	+	31	23	13	34	30	20	25	26	34	32	26	31	31	37	26	41
	=	39	55	44	45	41	65	49	52	43	45	41	50	44	44	38	47
	-	30	22	43	21	29	15	26	22	23	23	33	19	25	19	36	12
	S	1	1	-30	13	1	5	-1	4	11	9	-7	12	6	18	-10	29
BELGIQUE-BELGIE	+	29	27	19	25	25	28	22	31	28	31	23	30	27	28	21	25
	=	48	49	39	47	46	41	43	44	48	51	43	47	46	51	44	62
	-	23	24	42	28	29	31	35	25	24	18	34	23	27	21	35	13
	S	6	3	-23	-3	-4	-3	-13	6	4	13	-11	7		7	-14	12
LUXEMBOURG	+	24	21	13	27	25	27	12	26	28	26	21	25	21	35		
	=	60	66	44	43	46	49	51	61	48	50	51	47	52	49		
	-	16	13	43	30	29	24	37	13	24	24	28	28	27	16		
	S	8	8	-30	-3	-4	3	-25	13	4	2	-7	-3	-6	19		
UNITED KINGDOM	+			16	28	23	21	24	28	28	25	21	24	23	24	20	22
	=			42	46	49	53	56	59	59	56	63	64	61	63	63	71
	-			42	26	28	26	20	13	13	19	16	12	16	13	17	7
	S			-26	2	-5	-5	4	15	15	6	5	12	7	11	3	15
IRELAND	+		26	41	26	18	24	21	25	21	27	20	28	21	23	23	40
	=		29	35	46	30	47	39	40	48	39	38	37	47	50	60	54
	-		45	24	28	52	29	40	35	31	34	42	35	32	27	17	6
	S		-19	17	-2	-34	-5	-19	-10	-10	-7	-22	-7	-11	-4	6	34
DANMARK	+	34	27	19	26	24	20	21	24	25	26	17	27	26	19	19	24
	=	58	57	54	57	57	65	61	61	65	64	61	62	66	65	64	71
	-	8	16	27	17	19	15	18	15	10	10	22	11	8	16	17	5
	S	26	11	-8	9	5	5	3	9	15	16	-5	16	18	3	2	19
HELLAS	+								27	16	14	17	28	19	32	24	35
	=								47	45	31	34	36	39	39	43	43
	-								26	39	55	49	36	42	29	33	22
	S								1	-23	-41	-32	-8	-23	3	-9	13
E.E.C.	+	26	23	17	21	20	19	20	24	22	21	19	23	21	24	19	22
	=	51	51	45	48	44	50	47	50	50	50	46	49	48	50	49	57
	-	23	26	38	31	36	31	33	26	28	29	35	28	31	26	32	21
	S	3	-3	-21	-10	-16	-12	-13	-2	-6	-8	-16	-5	-10	-2	-13	1

KEY:
+ : Percentage of firms indicating an increase in traffic
= : Percentage of firms indicating traffic stable
- : Percentage of firms indicating a decrease in traffic
S : Balance (difference between + and -)

Table 3.2.

ECT-0320 — **UTILIZATION OF ROLLING STOCK** — 3rd quarter 1983

PAYS		1980				1981				1982				1983			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	+	39	33	27	30	26	28	21	29	33	28	20	19	27	31	27	
	=	45	53	47	52	50	53	52	47	49	51	51	54	51	51	51	
	-	16	14	26	18	24	19	27	24	18	21	29	27	22	18	22	
FRANCE	+	28	49	37	43	36	37	44	46	29	42	27	30	22	29	27	
	=	54	29	32	23	20	27	25	25	35	24	40	41	41	37	43	
	-	18	22	31	34	44	36	31	29	36	34	33	29	37	34	30	
ITALIA	+	27	27	22	20	14	14	18	17	15	14	17	12	11	14	22	
	=	55	52	56	47	48	55	59	62	64	62	52	64	54	69	57	
	-	18	21	22	33	38	31	23	21	21	24	31	24	35	17	21	
NEDERLAND	+	59	56	30	44	49	46	47	53	51	60	38	41	42	63	51	
	=	34	39	39	37	32	42	36	37	37	35	40	45	46	30	40	
	-	7	5	31	19	19	12	17	10	12	5	22	14	12	7	9	
BELGIQUE-BELGIE	+	51	52	31	32	28	33	31	41	41	56	39	45	48	57	54	
	=	36	37	41	47	48	46	51	45	43	34	42	41	40	33	37	
	-	13	11	28	21	24	21	18	14	16	10	19	14	12	10	9	
LUXEMBOURG	+	59	58	45	40	29	37	29	28	19	21	14	37	38	39		
	=	39	36	45	58	57	56	57	65	74	68	72	50	53	58		
	-	2	6	10	2	14	7	14	7	7	11	14	13	9	3		
UNITED KINGDOM	+			44	50	42	45	48	68	65	62	58	69	60	69	61	
	=			26	27	33	34	36	25	26	22	23	24	30	20	27	
	-			30	23	25	21	16	7	9	16	19	7	10	11	12	
IRELAND	+		38	57	63	28	30	31	36	34	30	30	46	37	49	43	
	=		47	33	22	40	40	38	36	37	40	47	41	39	30	41	
	-		15	10	15	32	30	31	28	29	30	23	13	24	21	16	
DANMARK	+	64	55	33	49	42	39	41	46	49	47	43	54	55	44	46	
	=	33	39	50	43	45	47	47	40	43	47	44	41	37	43	43	
	-	3	6	17	8	13	14	12	14	8	6	13	5	8	13	11	
HELLAS	+								23	17	14	8	27	17	15	25	
	=								56	54	29	31	39	41	50	41	
	-								21	29	57	61	34	42	35	34	
E.E.C.	+	44	45	32	39	33	33	34	39	35	41	30	36	34	38	37	
	=	44	42	43	40	39	43	44	41	44	39	44	45	43	43	44	
	-	12	13	25	21	28	24	22	20	21	20	26	19	23	19	19	

KEY:
+ : Percentage of firms indicating a very good and/or good utilization
= : Percentage of firms indicating a normal utilization
- : Percentage of firms indicating a bad utilization

Table 3.3.

ECT-0330

RECRUITMENT OF DRIVERS

3rd quarter 1983

Percentage of firms indicating having recruited drivers

PAYS	1980				1981				1982				1983			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	13	7	4	3	5	3	4	2	5	5	3	2	6	5	8	
FRANCE	8	6	4	3	4	3	4	4	5	3	4	4	6	3	3	
ITALIA	32	32	27	26	22	29	28	22	21	24	18	16	17	25	19	
NEDERLAND	36	32	16	19	15	19	14	11	18	19	19	8	15	25	18	
BELGIQUE-BELGIE	26	19	12	17	17	18	19	10	21	26	19	15	18	22	21	
LUXEMBOURG	50	42	34	21	35	30	14	27	21	31	28	27	42	35		
UNITED KINGDOM			4	17	12	10	19	25	21	19	20	21	18	26	25	
IRELAND		23	14	19	24	12	12	24	17	15	10	19	21	15	27	
DANMARK	21	19	14	13	12	8	17	7	14	20	6	11	10	13	15	
HELLAS								40	36	24	25	20	29	28	25	
E.E.C.	21	19	12	13	12	12	14	11	14	15	12	10	13	15	14	

Table 3.4.

ECT-0340

LIQUIDITY PROBLEMS

3rd quaiter 1983

Percentage of firms indicating having had liquidity problems

PAYS	1980				1981				1982				1983			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	29	29	32	34	43	44	39	42	40	39	40	62	31	26	29	
FRANCE	52	54	53	61	67	66	64	61	64	60	60	57	64	65	59	
ITALIA	49	57	53	64	65	72	70	70	72	76	69	70	76	76	68	
NEDERLAND	20	16	23	17	19	16	18	15	18	12	11	10	13	6	7	
BELGIQUE-BELGIE	26	25	27	29	27	39	28	32	32	27	26	31	27	26	21	
LUXEMBOURG	26	20	34	21	63	15	43	27	57	38	40	42	27	16		
UNITED KINGDOM			54	58	64	57	57	51	56	49	53	50	49	44	42	
IRELAND		85	57	62	79	59	53	51	58	58	50	59	59	55	42	
DANMARK	14	14	24	19	26	23	31	29	32	21	32	18	20	19	17	
HELLAS								63	54	76	79	69	72	68	76	
E.E.C.	39	40	41	46	53	53	51	50	53	49	49	49	50	49	46	

Table 3.5.

ECT-0350

INVESTMENT — 3rd quarter 1983

Percentage of firms indicating having made investments

PAYS	1980				1981				1982				1983			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
DEUTSCHLAND	42	45	35	34	32	28	32	30	27	35	30	34	34	44	39	
FRANCE	39	39	35	30	31	30	27	34	34	35	31	42	29	29	29	
ITALIA	33	39	35	34	26	29	26	27	26	25	21	20	18	24	25	
NEDERLAND	52	41	41	40	38	44	36	47	46	42	43	46	41	47	44	
BELGIQUE-BELGIE	39	38	35	34	30	36	30	29	30	39	32	38	42	40	42	
LUXEMBOURG	50	42	32	26	17	22	21	33	26	29	28	47	38	20		
UNITED KINGDOM			48	57	30	52	50	49	53	63	61	67	49	67	68	
IRELAND		33	38	46	28	27	30	29	25	22	27	19	31	24	44	
DANMARK	57	70	43	32	35	39	44	40	43	45	35	42	43	51	51	
HELLAS								46	33	42	24	29	42	34	34	
E.E.C.	41	42	36	34	31	33	31	34	33	36	32	38	33	35	35	

3.2. Cost Indices

3.2.1. Coverage

Six-monthly surveys are now being conducted on costs in Germany, France the Netherlands, Belgium /Luxembourg, UK and Denmark. Results have not yet been received from Italy, Ireland and Greece. UK results have been received, but as yet, not the cost structures. The German and the Dutch surveys give a breakdown of the cost factors by geographical relations. In the near future, it is expected that Belgian and French surveys will also give this breakdown.

3.2.2. Methodology

Indices for fuel are shown separately (tables 3.6. and 3.7.; and figure 3.3.), as allowance is made for the differences in cost of fuel estimated to be bought in each Member State. The indices for the other cost factors are based on the costs in the country of the hauliers. 1st January 1982 is used as the base point, and the indices are expressed in national currency and in ECU. Total costs are given in Tables 3.8. and 3.9. as well as in figures 3.4. and 3.5.

3.2.3. Overall costs developments : First half of 1983

Total cost continued increasing remarkably in national currency for France (7.3%) and slightly for Germany (0.1%) and Belgium (0.2%) while a decrease of 1.6% and 1.9% is noted for the Netherlands and Denmark respectively.
In ECU an increase varying between 0.9% and 1.5% for Belgium/Luxembourg, Germany and France while a decrease of approximately 2.5% is noted in the Netherlands and Denmark.
The German and Dutch surveys give a breakdown of the total costs by geographical relations. In the German survey, in national currency, a decrease between 0.1% and 0.7% is noted except for Italy where there is an increase of 0.8%.
In the Dutch survey, in national currency, there was a decrease for all Member States varying between 1.0% (France) and 2.3% (Italy).

3.2.4. Fuel cost developments : First half of 1983

For the first half of 1983, fuel costs in national currency fell by about 8% in Germany, the Netherlands, Denmark and marginally in the United Kingdom. They increased by 1.3% in Belgium while in France a small increase of 0.4% was noted.
In ECU, there was a decrease for Germany, France, Denmark and the Netherlands, a slight increase of 0.2% for Belgium/Luxembourg and a rather remarkable one of 5.5% for the United Kingdom.

Table 3.6. : Fuel cost in national currency

		1.1.78	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83
Germany	(DM)	57,6	57,5	74,1	86,5	93,6	100,0	96,8	99,1	91,4
France	(FF)	46,9	53,1	66,5	86,2	95,1	100,0	108,2	117,2	117,6
Netherland	(HFL)	55,4	57,0	77,0	86,0	94,4	100,0	99,0	99,4	91,9
B/L	(BFR)	45,5	47,7	66,9	78,9	90,0	100,0	102,2	105,4	106,7
U.K.	(UKL)	49,8	49,8	70,7	82,6	102,4	100,0	102,4	111,5	110,7
Denmark	(DKR)				78,1	95,8	100,0	100,0	118,0	108,2

Table 3.7. : Fuel cost in ECU

	1.1.78	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83
Germany	54,3	56,0	72,7	81,9	90,7	100,0	100,2	105,5	98,3
France	50,3	57,2	70,9	89,8	98,6	100,0	102,3	111,8	106,8
Netherland	53,4	56,3	75,1	82,3	90,1	100,0	101,7	105,3	96,7
B/L	47,1	50,1	68,9	79,1	90,7	100,0	94,4	97,3	97,5
U.K.	44,4	41,5	62,7	87,4	105,0	100,0	104,8	103,3	108,8
Denmark				78,5	98,6	100,0	97,7	116,6	105,7

Table 3.8. : Total cost indices in national currency

		1.1.78	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83
Germany	(DM)	75,8	79,6	86,3	94,6	98,8	100,0	102,3	102,4	102,5
France	(FF)	56,9	63,3	73,0	86,3	94,8	100,0	108,5	113,8	121,1
Netherland	(HFL)	75,2	77,9	86,6	92,5	96,4	100,0	101,1	102,5	100,8
B/L	(BFR)	67,7	71,6	79,6	88,8	93,6	100,0	105,6	109,0	111,2
U.K.	(UKL)									
Denmark	(DKR)				88,3	95,1	100,0	102,5	111,6	110,3

Table 3.9.: Total cost indices in ECU

	1.1.78	1.1.79	1.1.80	1.1.81	1.7.81	1.1.82	1.7.82	1.1.83	1.7.83
Germany	71,4	77,5	84,7	89,6	95,8	100,0	105,9	109,0	110,2
France	61,2	68,3	77,8	89,8	98,2	100,0	102,6	108,5	110,0
Netherland	72,4	77,1	84,5	88,3	92,1	100,0	103,8	108,6	106,1
B/L	70,0	75,2	82,0	89,1	94,3	100,0	97,5	100,7	101,6
U.K.									
Denmark				88,8	96,1	100,0	100,1	110,2	107,8

3.3. Price Surveys

3.3.1. Coverage

Price surveys are now being carried out in Germany, France, Italy, the Netherlands, Belgium and Luxembourg. The analysis relates to movements between these Member States up to the second quarter of 1983. The relationships of Italian hauliers to all Member States are only up to the fourth quarter of 1982, while those for the French hauliers are only up to the first quarter of 1983.

3.3.2. Methodology

The base point for the price indices results has been chosen as the first quarter of 1982; this facilitates the analysis as certain series either started or changed methodology late 1981 or beginning of 1982. In the calculations, the weighting factors used are tonne-kilometres relating to 1980.
Care must be taken in comparing the French results before the end of 1981, because of the change of series.

3.3.3. Overall results by nationality of haulier

Average prices (measured in national currencies) for Belgium/Luxembourg hauliers rose by 4.9%, while for Dutch hauliers there was a very small fall. In the case of German hauliers average prices rose very slightly.
These average price indices (in national currencies) together with those in a common currency (in ECU) are shown in Figure 3.6.

3.3.4. Price developments by relation

Figure 3.7. shows the development of the average prices (in ECU) of German, French, Dutch and Belgium/Luxembourg hauliers on the relations between these Member States while Figure 3.8. shows similar average prices of Italian hauliers and partner country.

German hauliers

Average prices (in ECU) on every relations have increased by just over 1% since the first quarter of 1983. In national currency there was a small increase of 0.4% .

French hauliers

Data for the second quarter of 1983 were received late. Analysis of results will be incorporated in the following report.

Italian hauliers

Due to technical reasons, analysis of results for first and second quarter will be incorporated in the following report.

Dutch hauliers

Average prices (in ECU) in relation with Germany and France show small decline 1.3% and 0.6% respectively, while to Italy there was a slight increase of 0.2%. Overall, average prices have decreased by 0.9% but in national currency there was an insignificant decrease of 0.01%. Data for the relation with Belgium/ Luxembourg has not yet been received.

Belgium/Luxembourg hauliers

In the second quarter of 1983 the average prices (in ECU) to Germany decreased by 2.5%, while to France, the Netherlands and to Italy they increased considerably by 4.7%, 6.5% and 11.5% respectively. Overall prices (in ECU) rose by 3.8% (but decreased in national currency by 4.9%).

Figure 3.6: EFFECTS OF CHANGES IN EXCHANGE RATES

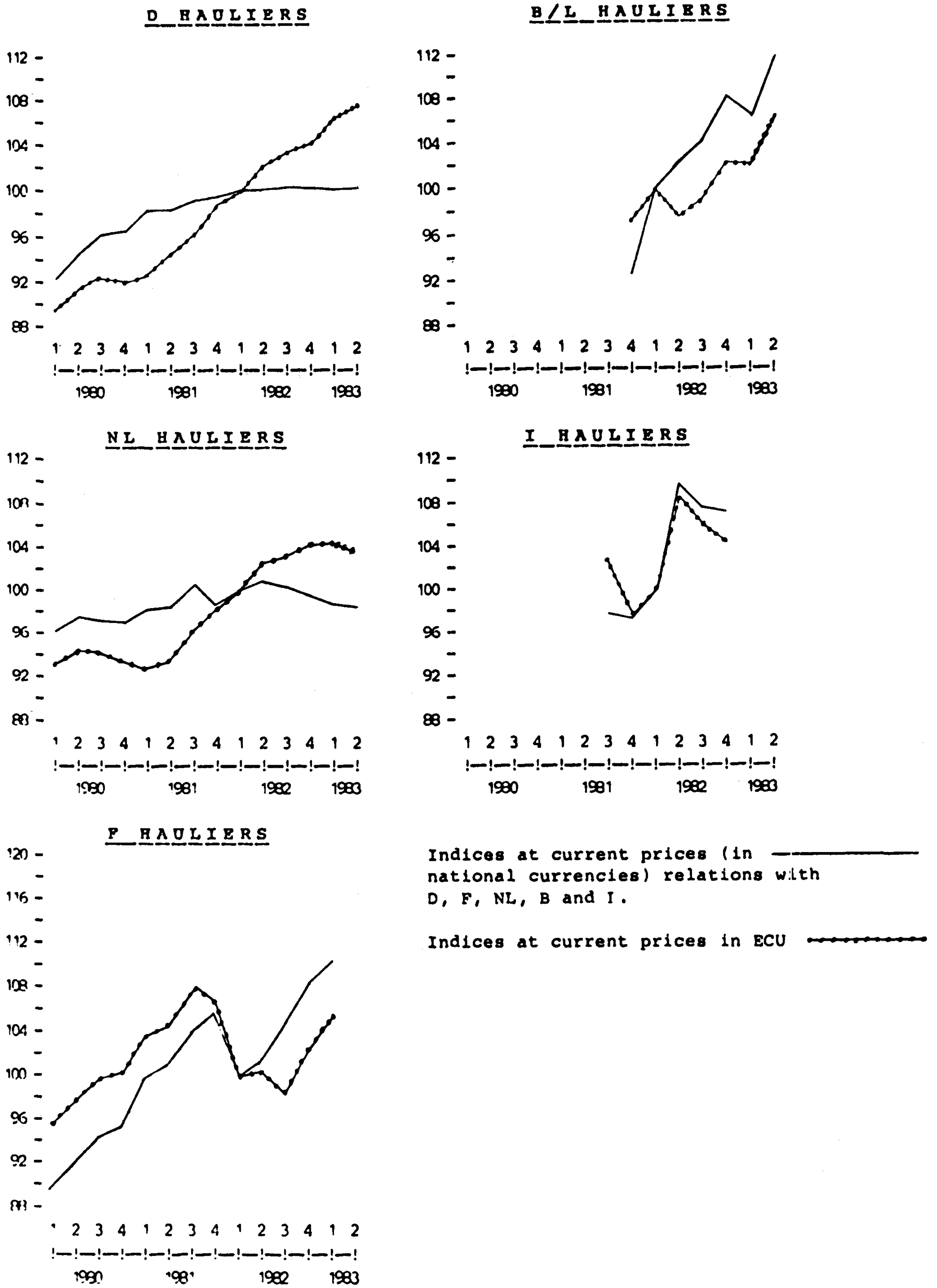


Figure 3.7: PRICE DEVELOPMENT IN RELATIONS BETWEEN D, F, NL, B(L)

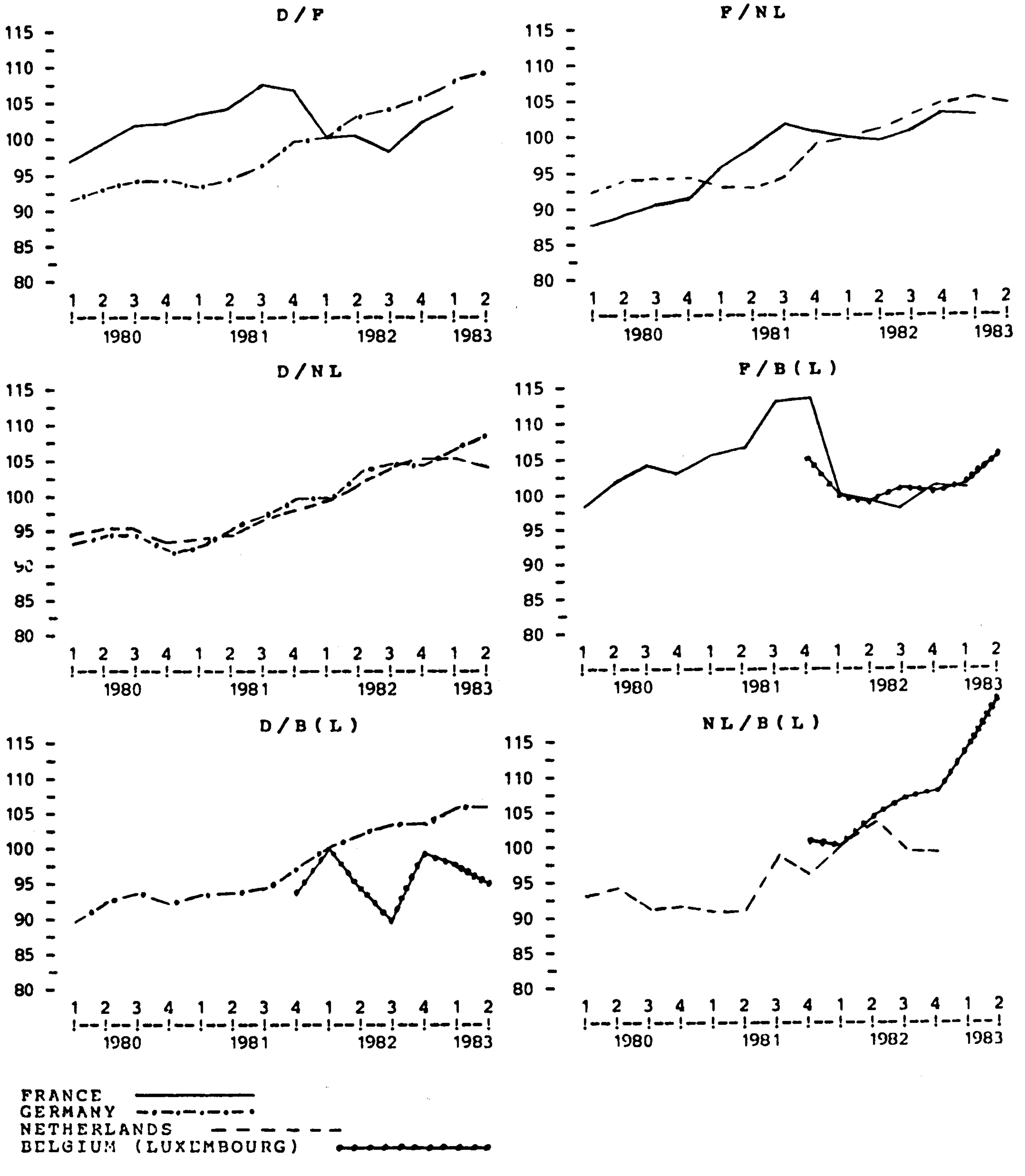
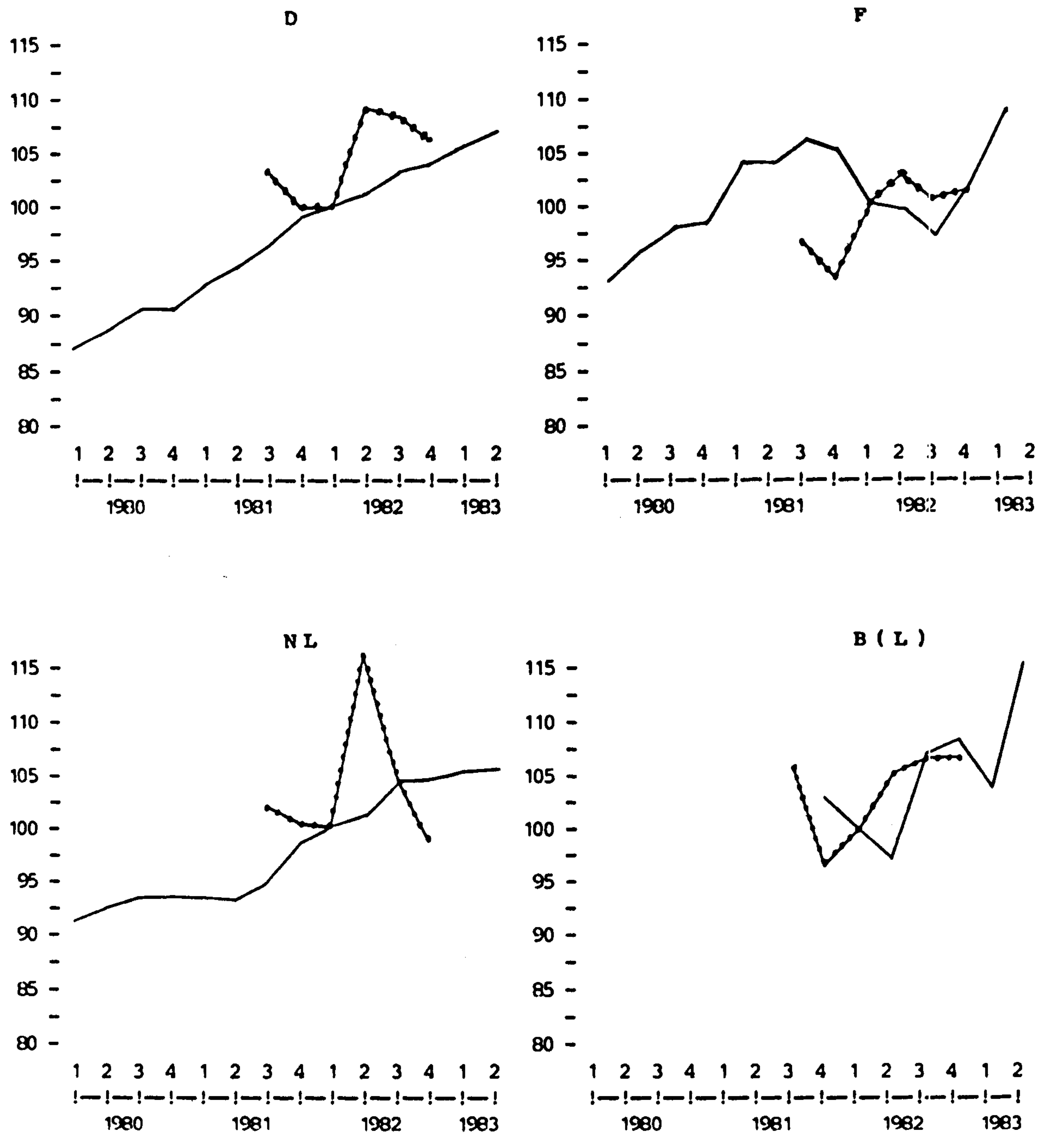


Figure 3.8: PRICE DEVELOPMENT IN RELATIONS WITH ITALY



Italian hauliers
Partner country hauliers

SECTION 4

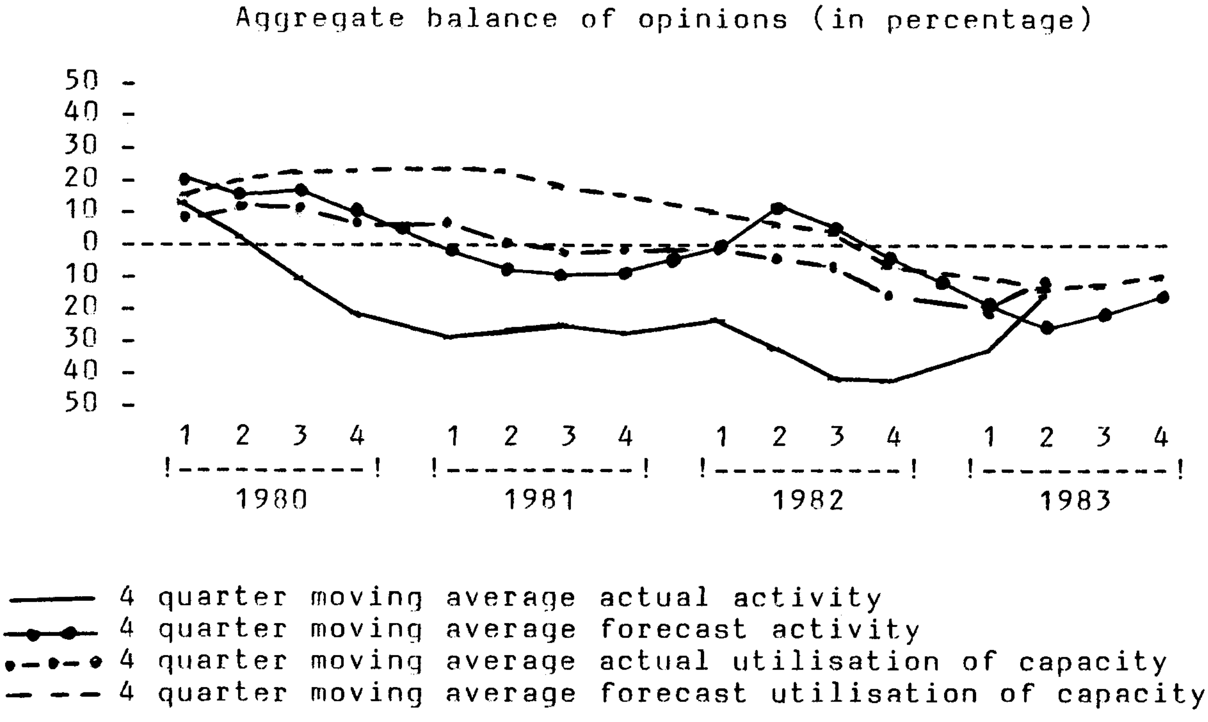
WATERWAY SURVEYS

4.1. Rhine traffic

4.1.1. Activity

In the opinion of shippers surveyed, the level of activity for the second quarter 1983 is much better than that of the second quarter 1982. Consequently, the moving average (calculated on the balance of opinion for the last four quarters) shows an increase in activity in comparison with the previous quarter (figure 4.1.).

Figure 4.1.: Rhine: Indicators of activity and Utilisation of Capacity (moving averages)



The upward tendency in the level of activity of the first quarter 1983 carried on in the second quarter, but the level of activity is still felt to be unsatisfactory. Consequently the specialised press reports a continued overcapacity. In the tanker sector however, the fleet was utilised at its maximum in June. For the first time since the end of 1981, the moving average of the actual utilisation of capacity shows an increase in the second quarter 1983 but its level is still considered to be below normal.

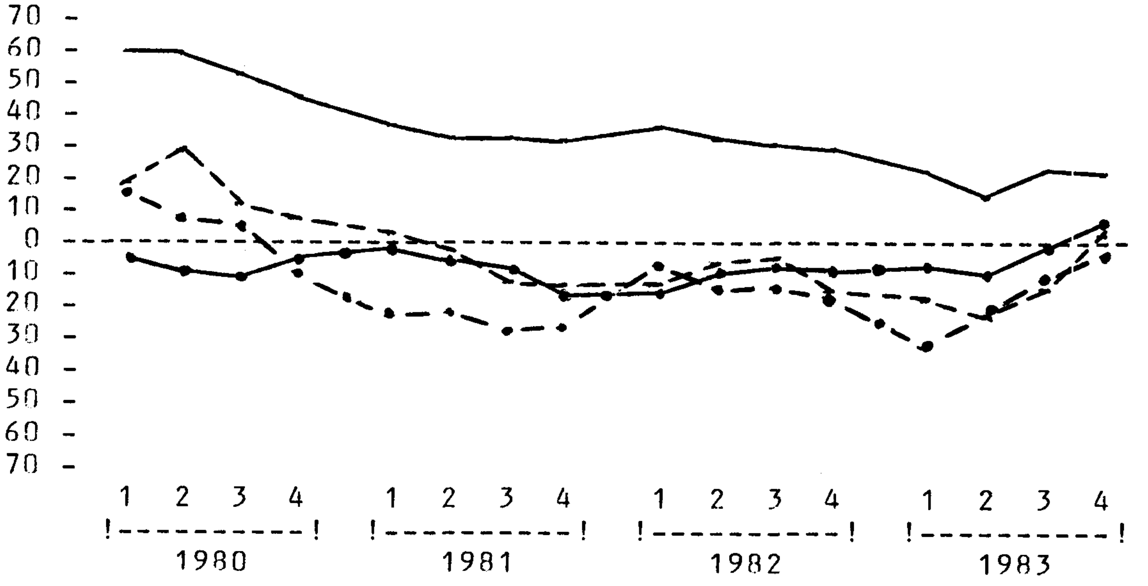
4.1.2. Forecasts

The expected upturn in the level of activity in the third quarter of 1983 is expected to continue in the fourth quarter of 1983 (see figure 4.1., moving average forecast). The activity indicates a continued recovery.

Forecasts on the utilisation of total capacity on the Rhine for the fourth quarter of 1983 show an upward trend. However the forecasts of the utilisation of total capacity for the third and fourth quarters of 1983 are less optimistic when compared to the same quarter of 1981 and 1982. It is clear that the normal seasonal upturn in demand was not expected to solve the present overcapacity problem, but due to the low water level on the Rhine in the fourth quarter, the overcapacity did in fact disappear.

Figure 4.2.: Rhine : Indicators of forecast for 4 important NST-groups (moving averages)

Aggregate balance of opinions (in percentage)



4 quarter moving average forecast activity
coal etc. (NST 2)
sand/gravel etc. (NST 6)
oil etc. (NST 3)
ore etc. (NST 4)

The moving average forecasts for the transport of different goods categories (figure 4.2) show that, in the opinion of the shippers questioned, the upward trend of the third quarter 1983 is carrying on in the fourth quarter of 1983. Except for coal, shippers seem to be less pessimistic than they were for the fourth quarter 1982.

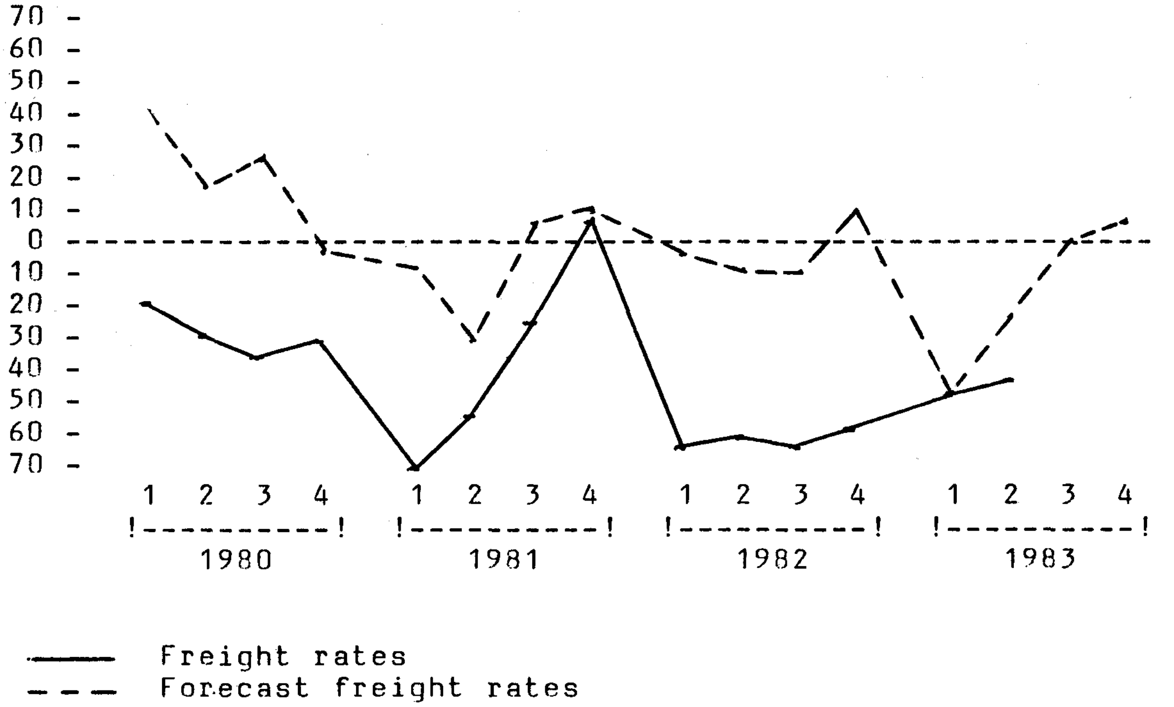
4.1.3. Freight rates

After a slight increase in rates in the fourth quarter 1982 and the first quarter 1983, shippers feel that the upward trend continued in the second quarter 1983, where rates were higher than in the same quarter of 1982 but still considered unsatisfactory.

The expected upward trend of the freight rates which started in the second quarter 1983 is continuing in the fourth quarter. Increase in traffic is expected as well for the last quarter of 1983. In spite of the optimistic forecasts and the low water level, the full employment of the Rhine-fleet has not brought high freight rates, according to the specialised press.

Figure 4.3. Rhine : developments in freight rates

Aggregate balance of opinions (in percentage)



4.2. North-South traffic

4.2.1. The inquiry survey of activity for the third quarter of 1983 amongst Belgian and Dutch waterway transporters shows that activity is felt to be slightly down against the second quarter 1983, but considerably up against the third quarter 1982. The expected seasonal downturn during the third quarter emerged but was clearly less dramatic than last year and indicates that the market is still depressed, but slightly improving.

The balance of opinion during 1982 and quarters 1 and 2, 1983, is :

1982				1983		
Q1	Q2	Q3	Q4	Q1	Q2	Q3
-57	-28	-67	-43	-58	-45	-49

Although no survey is carried out in France, the statistical data available indicate that transport activity, measured in tonnes, dropped by 0.8% for French exports, 12.6% for imports and by 33% on the French national market, compared with the same quarter of last year.

Table 4.1.: Changes in activity assessment (difference in respective balance of opinion) by Dutch and Belgian shippers, Q3 over Q2 by bilateral relation.

From/To	B	F	NL
B	+18	-18	+21
F	-31		-5
NL	+16	-3	-13

Compared with the last quarter, the changes in activity for France during this quarter indicate a rise of imports of +10.0%, of exports of +1.6% and on national traffic of +13.4%.

Although these figures seem to contradict those of the opinions of Belgian and Dutch transporters on transports to and from France, French statistics indicate that the participation of Dutch and Belgian shippers on these routes went down by 10.7% and 20.5% respectively during the third quarter compared to the second quarter.

This development could be explained by the influence on Belgian and Dutch transporters of the introduction of the French levy system.

Table 4.2.: Changes in activity assessment by Dutch and Belgian shippers Q3 over Q2 by tonnage class.

Tonnage class	Belgian shippers	Dutch shippers	Total
200-450	-13	+10	+4
451-750	+50	-17	-7
751-1150	+5	-2	+1
1151-1550	-11	-1	-1
1551	+5	+32	+20

4.2.2. Waiting Time

In addition to these surveys the number of waiting days at the "bourse" is an important indicator of the development of activity in relation to capacity available. Table 4.3. and the subsequent figures illustrate the important seasonal and trend changes in this indicator.

Table 4.3. Quarterly average of waiting days in international North-South traffic.

Country of origin	Year	Q1	Q2	Q3	Q4
B*	1981	7.0	6.0	8.0	4.5
	1982	5.2	7.5	8.5	7.5
	1983	8.2	8.8	8.5	
F	1981	8.5	7.0	15.3	14
	1982	9.2	18.0	16.1	13.2
	1983	20.9	17.0	21.0	
NL	1981	8.3	4.4	5.6	3
	1982	6.5	6.2	9.8	7.1
	1983	6.9	6.9	8.5	

*Domestic traffic included

The average number of waiting days during the third quarter compared with the second quarter went up in France and The Netherlands which could be explained by the seasonal influences. In Belgium the number of waiting days stayed at about the same level which corresponds with the positive opinion given on Belgian national traffic and traffic to and from The Netherlands by Belgian and Dutch transporters(table 4.1.).

The following figure shows the development of waiting time on the various bilateral relations during the third quarter 1983 in comparison with the third quarter 1982.

Figure 4.4.: Weekly average of waiting days in the relation from the Netherlands to Belgium and France.

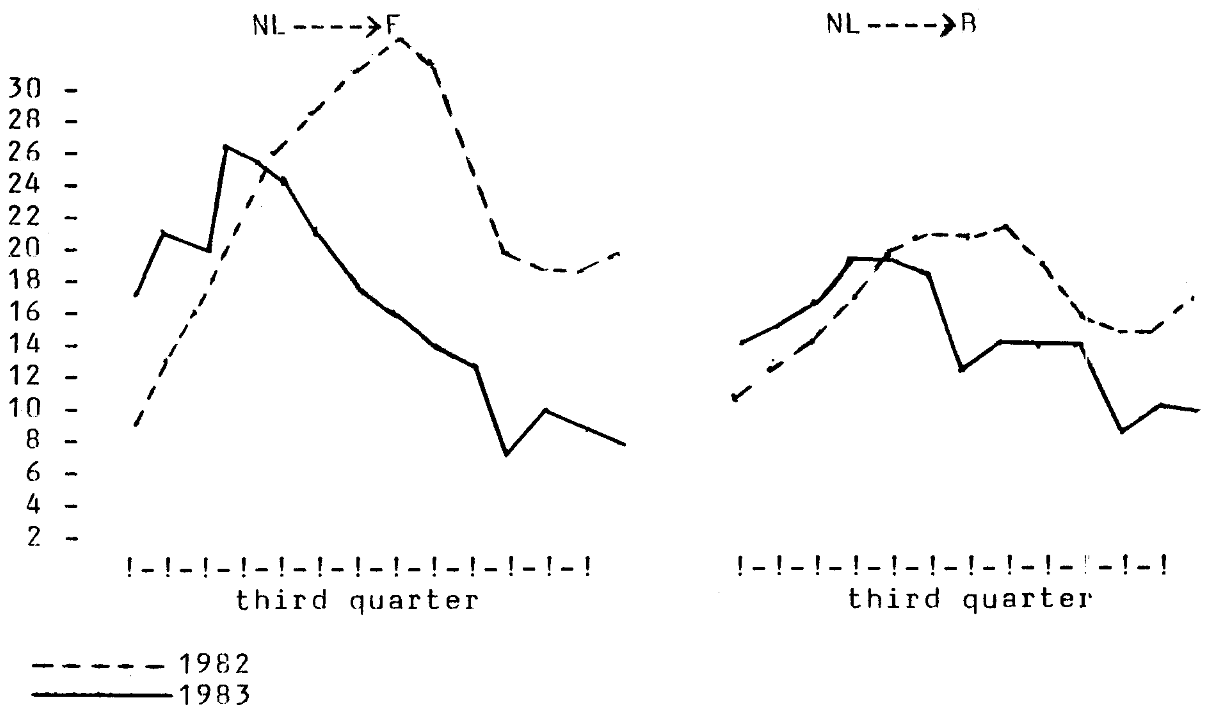


Figure 4.5.: Weekly average of waiting days in North-South traffic, from Belgium to France, including Belgian domestic traffic, and from Belgium to The Netherlands (bourse of Antwerp).

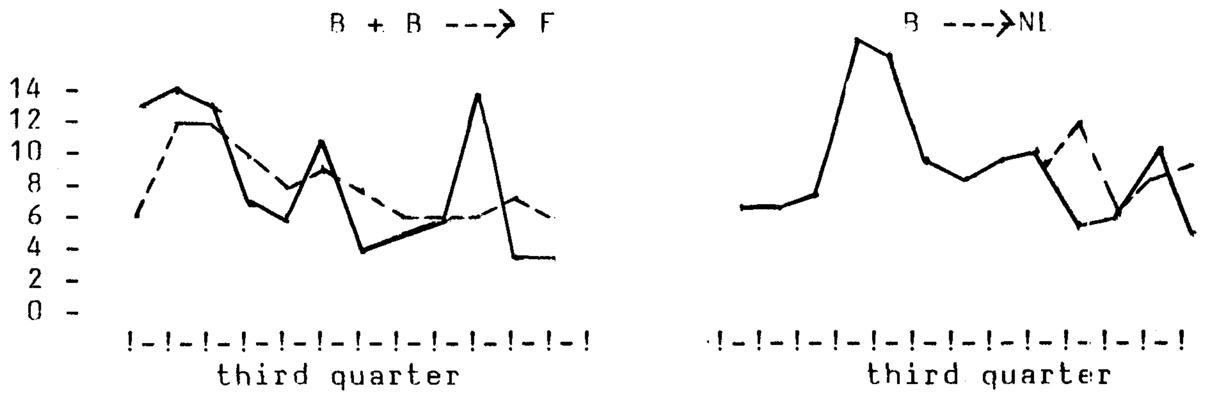
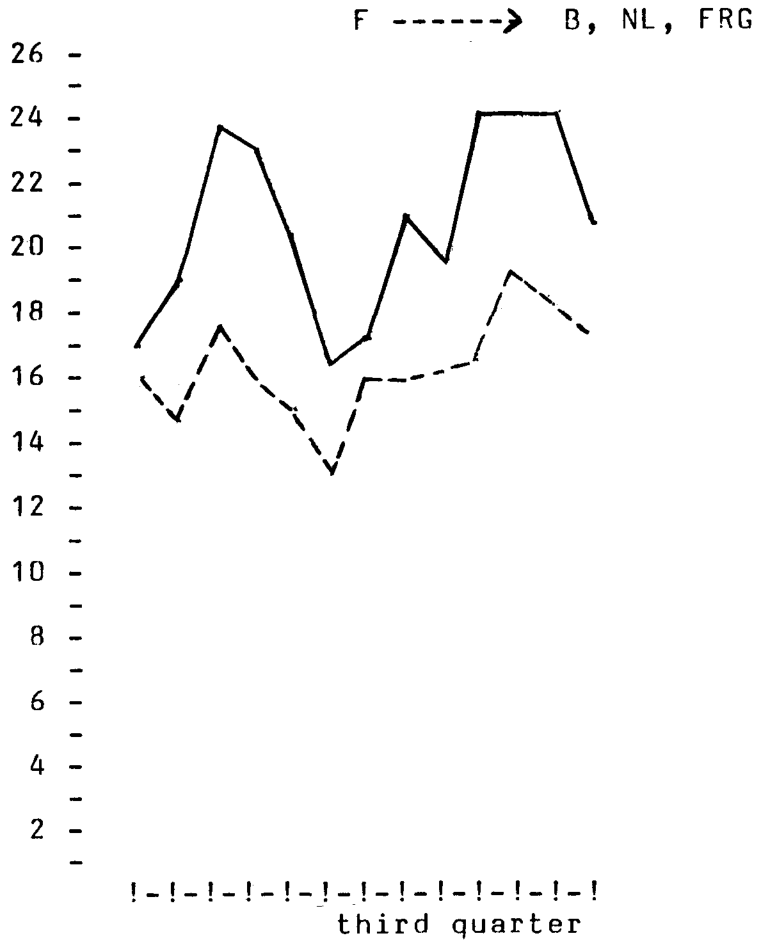


Figure 4.6. Weekly average of waiting days in North-South traffic from France.



The general picture from these figures is the following:

- the third quarter 1983 started off with a much higher number of waiting days than the third quarter 1982 during which the present crisis became much more severe;

- at the end of the third quarter the influence of the beginning of a period of low water level on the Rhine became apparent, contrary to 1982, when the waterlevel on the Rhine allowed fully loaded vessels. Consequently the number of waiting days on the North-South relations in September was in general lower than in 1982. On the relation F ---- B, NL, FRG the influence of the low water level on the Rhine had less impact and did not lead to less waiting days than in 1982;

- the peak in the number of waiting days on the relations B+B ---- F and B---- NL in September marks the strike of certain port services in Belgium.

4.2.3. Prices

A two third majority of shippers were of the opinion that freight rates were stable compared to the previous quarters. The balance of opinion of Dutch transporters was more negative than in the previous quarters (-17 in the second quarter as against -3 and -11 during the second and first quarter 1982 respectively). As could be expected from the opinion on Belgian traffic and development of the number of waiting days the balance of opinion of the Belgian transporters was more positive than in the previous quarter (+10 in the third quarter as against -5 and -21 during the second and first quarter 1983 respectively) and became positive for the first time since the first quarter 1982.

4.2.4. Forecasts : Optimism following low water levels

Forecasts by inland waterway transporters of the demand for transport services for the fourth quarter 1983 are optimistic. The obvious reason for this general attitude is the outlook of continuing dry weather and expected low water levels on the Rhine which could lead to a bigger need for capacity on the Rhine and consequently to a lower number of waiting days on national and North-South markets. However, the structural overcapacity still exists. Therefore, this development could only be a temporary improvement of the market situation. The opinions of Belgian and Dutch shippers are showing the same tendencies as is demonstrated in the following table.

Table 4.4.: Balance of opinion on forecasts of activity in the next quarter.

Country/Quarter	1982				1983			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
B	-10	-23	-33	-40	-64	-52	-49	+32
NL	-15	-8	-48	-6	-31	-24	-18	+21
Total	-13	-13	-43	-17	-42	-33	-28	+28

The calculations are based on the actual cost developments on 47 international trafic relations representing total international waterway transport in the Community. By weighting the various relations cost indices and cost elements, indices are found for each of the bilateral trafic relations between Member States and for the North-South and Rhine inland waterway transport markets.

The information will be collected twice a year, on 1 January and 1 July. Publication in the Quarterly Report is foreseen in the even numbered issues. Additional, more detailed information can be made available by the publisher.

4.3.2. Overall cost developments

Table 4.6.: Overall cost indices and cost indices by market on 1.1.1983 and 1.7.1983 in ECU. (1.1.1982=100)

	Overall		Rhine		N-S	
	1.1.83	1.7.83	1.1.83	1.7.83	1.1.83	1.7.83
Wages	107,4	110,0	109,2	111,6	104,7	107,6
Capital	95,9	95,2	97,4	97,5	93,5	91,6
Fuel	106,6	99,5	108,4	100,0	103,8	98,9
Other costs	103,9	105,2	105,6	107,8	101,3	101,1
Total costs	103,7	104,0	105,3	105,5	101,1	101,9

Total costs went up in 1982 by 3.7%, which is a low figure given the average inflation in the relevant Member States. Following a fall in interest rates, capital costs went down, but fuel costs, wage costs and other costs increased with 6.6%, 7.4% and 3.9% respectively. In the first half year 1983 total costs hardly changed: capital costs decreased further and fuel costs went down considerably. On the other hand, wage costs increased as well as other costs.

In Rhine shipping overall costs increased more in 1982 than on the North-South market (105,3 against 101,1); all costs elements showed the same pattern. During the first half of 1983, costs increased more on the North-South market than on the Rhine (0.8% points agains 0.2% points).

Consequently, waterway transporters in Belgium and The Netherlands expect positive developments on freight rates compared with the previous quarter and to the same quarter of 1982, as is shown in the following table.

Table 4.5.: Balance of opinion on forecasts of freight rates level in the next quarter.

Country/Quarter	1982			1983			
	Q2	Q3	Q4	Q1	Q2	Q3	Q4
B	-10	-8	0	0	-6	-6	+21
NL	-12	-8	0	-10	-12	-13	+35
Total	-11	-8	0	-7	-10	-11	+31

4.3. Cost Indices

For the first time since the publication of the Quarterly Reports cost indices for international inland waterway transport are published in this issue.

4.3.1. Methodology

Cost indices are calculated for four shiptypes:

- ships having a carrying capacity of 350 tonnes;
- ships having a carrying capacity of 600 tonnes;
- ships having a carrying capacity of 1200 tonnes;
- pusher units.

Since the information on pusher units is not yet available these calculations are based on the costs of 4 motorvessels of 2200 tonnes.

The cost indices are calculated following a given cost structure in the base year (1.1.1982). The following cost elements are taken into account:

- wages
- capital
- fuel
- other costs

On waiting days the following assumptions were made:
Rhine: 1 day
N/S : 10 days

4.3.3. Cost developments by shiptype

Table 4.7.: Cost indices by ship type on 1.1.1983 and 1.7.1983 in ECU (1.1.1982=100)

	350 t.		600 t.		1200 t.		pusher units	
	1.1.83	1.7.83	1.1.83	1.7.83	1.1.83	1.7.83	1.1.83	1.7.83
Wages	104,7	107,8	103,9	107,0	108,1	110,7	110,3	112,1
Capital	92,8	90,7	94,6	92,8	96,8	96,5	97,3	97,9
Fuel	103,7	99,7	103,7	99,8	107,6	99,8	107,8	98,0
Other costs	101,4	100,7	101,5	102,0	104,6	106,3	108,0	108,9
Total costs	101,5	102,7	101,2	102,2	104,3	104,4	105,7	105,4

During 1982 costs increased for all shiptypes. However, costs increased more for the 1200 tonnes ships and for pusher units than for the smaller vessels. In particular the different incidence of wage costs and other costs increases contributed to this result.

For the first half of 1983, costs increased more for the smaller vessels while overall costs for the 1200 tonnes vessel remained more or less stable (1.2 and 1.0 % point against 0.1% point).
Fuel costs and capital costs decreased and reached a level below the one of 1.1.1982.

4.3.4. Cost developments by flag

Table 4.8.: Total cost indices by nationality of the vessel on 1.1.1983 and 1.7.1983 in national currency (1.1.1982=100)

	B (FR)		D (DM)		F (FF)		NL (HFL)	
	1.1.83	1.7.83	1.1.83	1.7.83	1.1.83	1.7.83	1.1.83	1.7.83
Overall	101,9	105,3	100,7	102,7	106,9	111,7	100,7	100,3
Rhine	101,6	103,3	100,7	102,5	104,5	107,9	100,4	99,3
N-S	102,3	105,9			108,7	114,2	101,7	101,7

The overall cost indices in national currency by nationality of the vessel increased in 1982, in particular for France (6.9%), followed by Belgium (1.9%), Germany (0.7%) and the Netherlands (0.7%). For the first half of 1983 the picture is more or less the same. In the countries with high inflation, above 7% on a yearly basis, France and Belgium, costs increased by 4.8 and 3.4 percent points respectively. In countries with low inflation increases were small (Germany +2% points) or a decrease could be noted (Netherlands -0.4% points).

SECTION 5

RAIL SURVEYS

5.1. Railway Price Indices

5.1.1. Coverage

Price indices are now being carried out in Germany France and Italy. The three railways agreed on the method of a "basket" of representative commodities defined for each directed relation from actual traffic data for the reference period (1981).
SNCF have applied the method on the France-Germany, France-Italy and France-Belgium links. DB anc FS on Germany-France and Italy-France respectively.
SNCB and NS will join the experimental from the beginning of 1984.

5.1.2. Price developments by relation

The evolution of price indices of rail transports carried out in complete loads was for:

France-Italy

31.12.81	30.6.82	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83
100	107.51	110.38	118.12	124.22	131.51	132.26

In the third quarter of 1983 receipts of the French sector show an average increase of 21-22% since 31.12.81 (except rail-road 28%). Compared to the second quarter of 1983 there was a change in the tariffs only for wheat and barley (from 15% to 21%). On the Italian sector receipts increased to 59-60% (except sand 68%) and there was no change in the tariffs from the previous quarter.

France-Germany

31.12.81	30.6.82	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83
100	107.89	108.98	108.98	113.75	113.84	114.13

Except for maize in both sectors and cars (tariff 9674) in the German sector, there was no change since the second quarter of 1983. Thus the receipts on the German sector continue to show an increase of 5-8% (since 31.12.81). The increase for the French sector is 21-22% (except maize and car tariff 9674) and is the same as for the France-Italy relation .

France-Belgium

31.12.81	30.6.82	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83
100	103.00	106.10	114.29	115.33	115.33	117.71

For the 9 representative commodities of this relation, the evolution of price indices varies considerably for both carriers. For SNCF it is between 12 and nearly 24% and for SNCB it is between 12 and 30% (since the 31.12.81).
Except for wheat and cereals in both sectors the tariffs are the same as in the previous quarter.

Italy-France

31.12.81	30.6.82	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83
100	108.82	112.19	115.31	120.77	127.33	127.33

While the France-Italy relation shows an increase of 32% in the tariffs since 31.12.81 in the Italy-France relation the increase rose by 27%.
There was no change in the tariffs during the third quarter of 1983.

Germany-France

31.12.81	30.6.82	30.9.82	31.12.82	31.3.83	30.6.83	30.9.83
100	108.06	108.06	108.06	113.65	113.98	

Analysis of results for the third quarter will be incorporated in the following report.

SECTION 6

COMBINED TRANSPORT

6.1. Container traffic

International rail container traffic shows a continuing upward trend in the third quarter of 1983. The traffic level in TEU in the third quarter was 11% above the corresponding period of 1982 and despite the incidence of the summerholiday period was almost at the level of the second quarter of 1983. This trend will, if maintained, givea total traffic for 1983 of around 760,000 TEU or 6% increase on 1982. This traffic corresponds to about 7.3 million tonnes of cargo carried by international rail container services in 1983.

Maritime traffic, which is the movement of containers by rail to and from or between container ports, increased by 13% in the third quarter. Container and swap body traffic for inter-European cargo was 7% over last year's level.

The recent growth of European exports to the United States has certainly had an influence on these results. Routes which were particularly strong were from Italy to the Netherlands and from Denmark to the North German ports.

Traffic between Austria and ports in Germany and the North Adriatic also increased sharply as did French container cargo via the Belgian ports. Continental inter-European traffic has again been strong with liquid milk in tank containers from Germany to Italy again running to 15 to 16 trains weekly. Further trains of milk containers now run from France to Italy. Container traffic from Spain to the Community countries has grown again in this quarter, but the regular trains from Germany to Greece have been poorly loaded since the summer.

Traffic to and from the USSR frontier has increased by over 50% on the 1982 period and the likely end of year results will be of over 20,000 TEU following the introduction of regular trains of cargo for the Chinese People's Republic taking the transsiberian route.

The average rate for international rail container movements increased overall by about 3% from 1 July 1983 (expressed in UIC francs).

6.2. Piggy-back transport

The information given is the number of units despatched by the "organising company", i.e. the number of semi-trailers, swap bodies or road trains carried by rail wagons.
The second quarter of 1983, compared to the first quarter of 1983, shows a marked increase in the overall growth rate.

6.2.1. International traffic by companies based in the Community

Country of despatch		Units despatched Q2/83	% change from Q1/83	% change from Q2/82
Kombiverkehr	D	14006	12	2
Novatrans	F	2435	16	-29
	I (except D)	3979	-5	-22
	UK	905	-16	-25
FERPAC	I (to D)	2334	27	9
Trailstar	NL	1598	14	8
TRW	B	3180	15	9
Total		28437	10	-5

While there were some exceptions in different companies, figures were more optimistic in the second quarter of 1983 than those in the first quarter of 1983.

Kombiverkehr in this quarter achieved a 49% share of the market. In this company since 1.1.83 border crossing traffics SP/F were considered in the D --- SP relation, so the total number of units despatched for this relation is 2565 (15% from Q1/83). Novatrans, in trade with France, has a significant increase of 16% in total traffic, but Italy and UK trade results show heavy losses on almost all relations.

For Ferpac and TRW, after a pessimistic quarter, the units despatched in the second quarter of 1983 have the more positive figures, even more than those of the corresponding period of 1982.

6.2.2. Important intra-Community relations (over 1000 units in Q2/83)

Relation	Units despatched Q2/83	% change from Q1/83	Q2/82
D ------ I	6206	21	11
F ------ I	1407	-10	-25
I ------ F	1366	-11	-18
I ------ UK	1178	-8	-19
I ------ D	2334	27	9
I ------ B	1435	4	-27
B ------ I (via F)	1846	3	-15
H ------ I	1299	17	12
Total	17071		

ORGANISATIONS UNDERTAKING SURVEYS

(a) Road Opinion Survey

B	Institut du Transport routier
DK	Danmarks Statistik
D	IFO (Institut für Wirtschaftsforschung)
F	Centre de Productivité des Transports
GR	Ethniki Statistiki Ypiresia (National Statistical Office
IRL	Central Statistical Office
I	Centro Studi sui Sistemi di Trasporto
L	Service central de la Statistique et des Etudes économiques
NL	Economisch Bureau voor het Weg- en Watervervoer
UK	Department of Transport

(b) Road Cost Survey

D	Bundesverband des Deutschen Güterfernverkehrs (BDF) e.V.
F	Comité national routier
NL	Economisch Bureau voor het Weg- en Watervervoer
B	Instituut voor Wegtransport
L	Fédération des Commerçants du Grand-Duché
UK	Road Haulage Association Ltd.
DK	Landsforeningen Danske Vongmaend

(c) Road Price Survey

B	Institut du Transport routier
D	BAG (Bündesanstalt für den Güterfernverkehr)
F	Ministère des Transports
I	Centro Studi sui Sistemi di Trasporto
L	Ministère des Transports
NL	NIWO (Nederlandsche Internationale Wegvervoer Organisatie)
	CBS (Centraal Bureau voor de Statistiek)

(d) Inland Waterway Opinion Survey

Rhine	Central Rhine Commission	
North-South	B	Institut pour le Transport par Batellerie
	NL	Economisch Bureau voor het Weg- en Watervervoer

(e) Inland Waterway Cost Survey

NL Economisch Bureau voor het Weg- en Watervervoer
in collaboration with
F Office National de la Navigation
B Institut pour le Transport par Batellerie
D Bundesverband der deutschen Binnensochiffahrt

(f) Rail Price Indices

D DB (Deutsche Bundesbahn)
F SNCF (Société nationale des Chemins de fer)
I FS (Azienda autonoma delle Ferrovie dello Stato)

(g) Combined Transport

Intercontainer (container transport)
Interunit (piggyback transport)

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