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**A look at performance of  
Europe's Road  
Infrastructure Sector**

**#WEMAKE2BUILD**

# The European Union Road Federation

## ➤ Who we are

- Non profit organisation
- Founded in 1998
- 68 Members
  - Industry
  - National Road Associations
  - Research centres and notified bodies
  - Professional organisations
- Representing the sector of the Road Infrastructure in Europe and outside
- 'The Voice of the European Road'



# The European Union Road Federation

## ➤ 4 major programmes

### ■ Road Safety

- Road markings
- Road Signs
- Road Restraint Systems (barriers)
- Safety on Work Zones



### ■ Sustainability

### ■ Road Asset Management and Financing

### ■ Smart Mobility



# The European Union Road Federation

## ➤ Our Activities (1)

- Follow-up and analysis of European Policies related to road transport and mobility
- Information to the members
- Dedicated internal working groups
- Technical seminars (organisation / participation)
  - In Europe and abroad



# The European Union Road Federation

## ➤ Our Activities (2)

- European Projects and Research
- Cooperation with other European and International organisations
  - PIARC
  - CEDR
  - ITF / OECD
- Publications
  - Position Papers, Manifestos
  - Technical Brochures
  - European Road Statistics



# The ERF European Road Statistics

➤ Published every year (since 2001)

➤ In printed format (until 2016)

➤ Then online



# The ERF European Road Statistics

- Large variety of content
- Selection and compilation of existing statistics
  - Not in house creation
  - Insufficient staff and financial resources
- Different reliable sources
  - e.g., ACEA, EC, Eurostat, IRF, ITF, National Stats, UIC,...
- Identify and highlight useful trends for the road sector

General Data 2023

Road Network 2023

Infrastructure  
Financing 2023

Road Maintenance  
and Investment 2023

Freight Transport 2023

Passenger Transport  
2023

Safety 2023

Taxation 2023

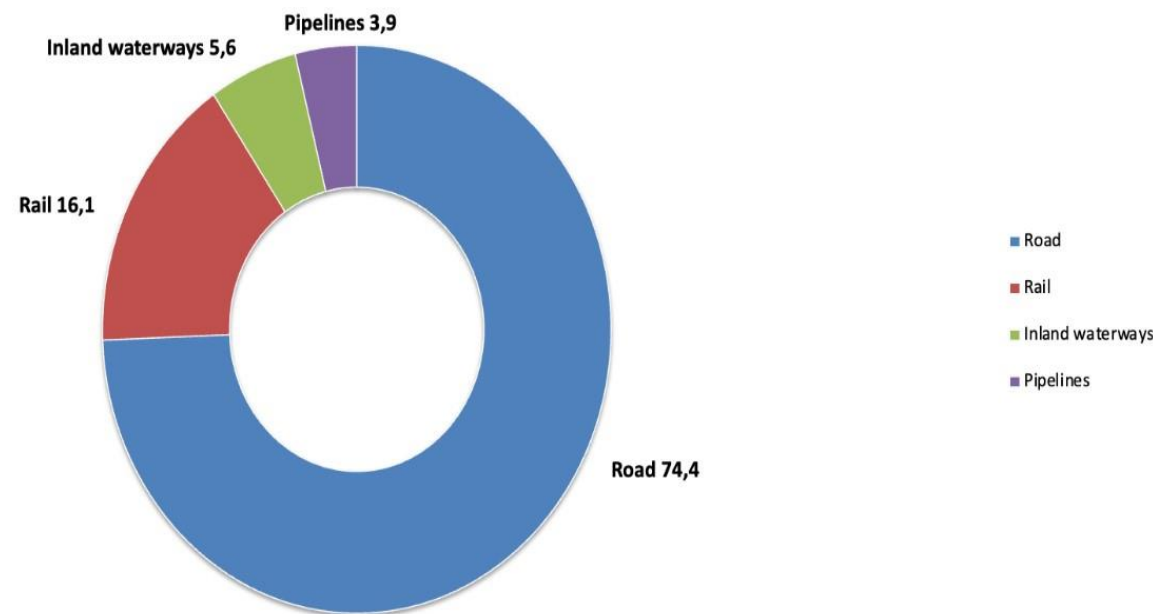
Environment 2023

# Europe's Road Transport Performance

## ➤ Freight Transport



5.4 Inland transport modal split in EU 27, 2020 (% of tkm)

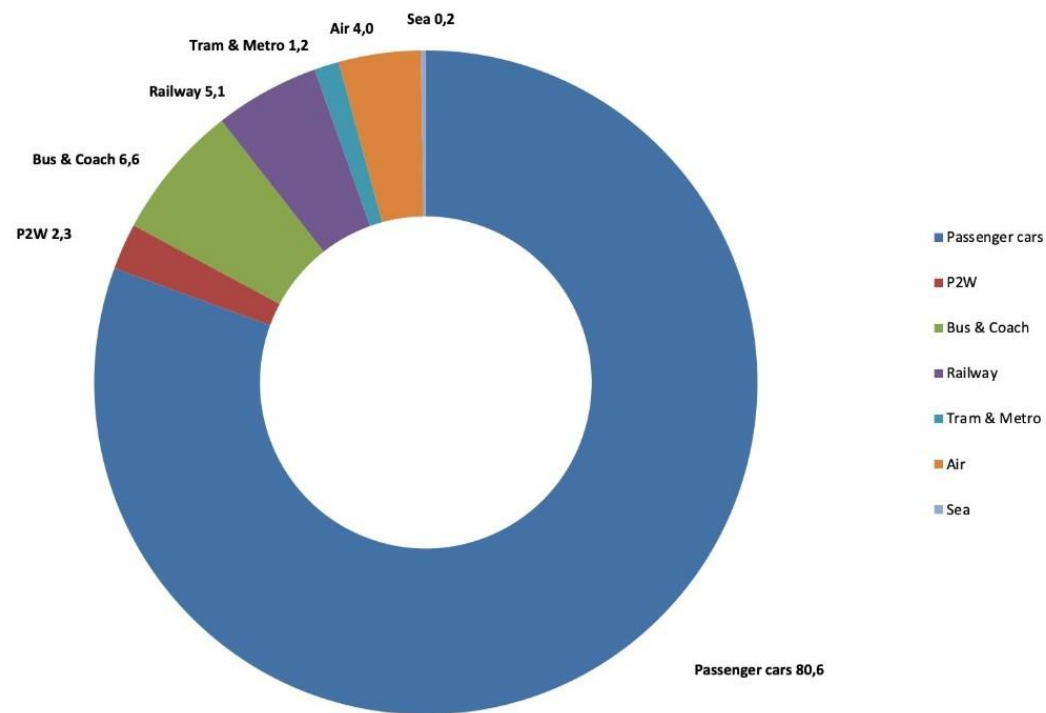




# Europe's Road Transport Performance



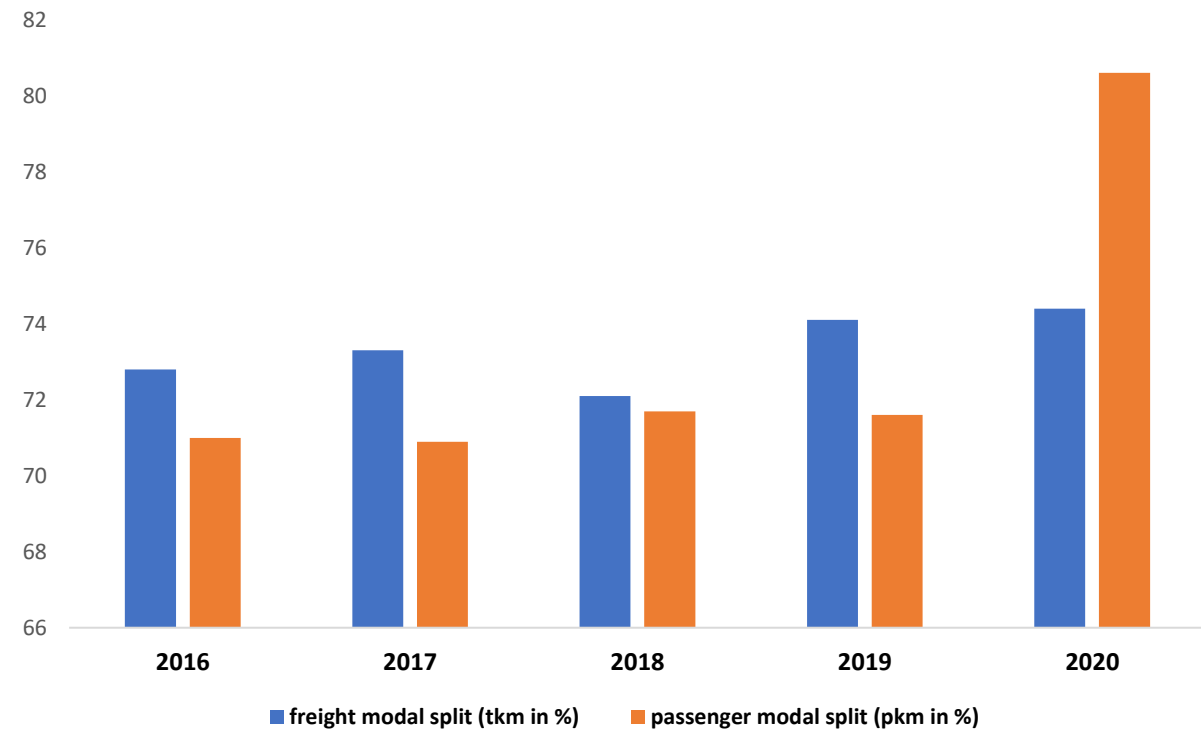
6.3 Passenger transport modal split in EU 27, 2020 (pkm in %)



➤ Passenger Transport

# Europe's Road Transport Performance

- Road transport modal split
  - Evolution over 5 years



# Europe's Road Transport Performance (financing)

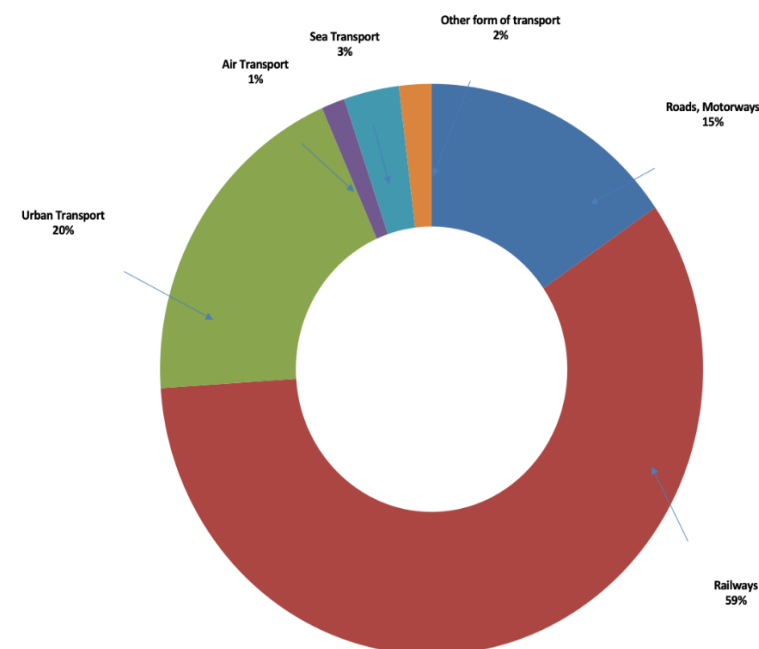
## ➤ Despite high modal split for road transport

- Between 70% and 80 %

## ➤ Unbalanced financing split (e.g., EIB loans)

- 59% for rail
- 15% for roads

3.4 European Investment Bank Loans for Transport to EU 28, 2021 (total € 9 333 million)

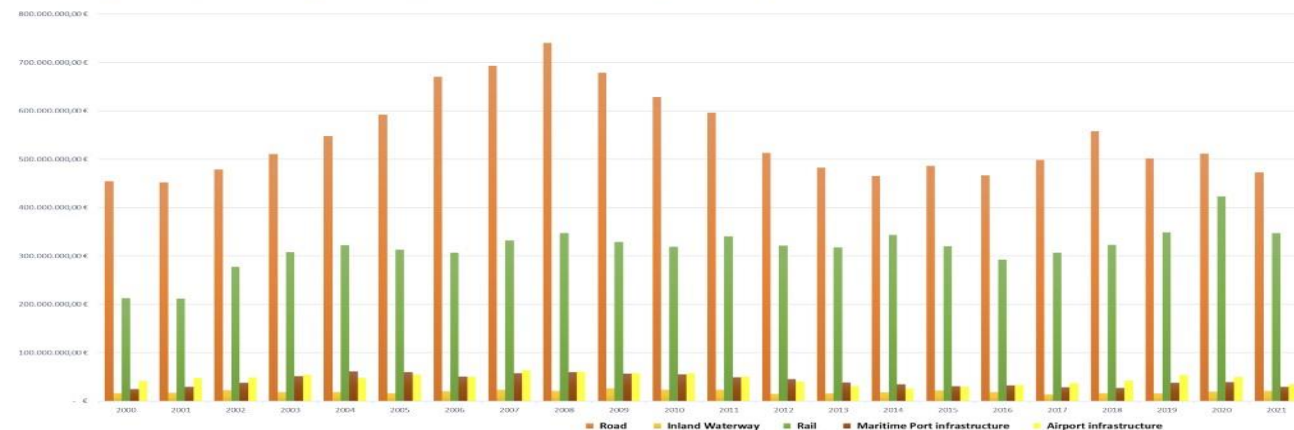


# Europe's Road Transport Performance (financing)

➤ Analysis of trends over longer periods



**4.4 Distribution of infrastructure investment between modes in EU 27, 2000-2021**  
(Euros, current prices, current exchange rates)



# Europe's Road Transport Performance (financing)

➤ Necessity of road infrastructure investment for its maintenance, preservation and adaptation to new mobility

➤ Financial impact

- Increase of maintenance costs when recurrent lack of Investment

➤ Environmental impact

A survey carried out in Spain shows that the lack of maintenance investment on national, regional and local roads has led to a situation where the investments requirements per km have increased dramatically.



INFORME NECESIDADES DE INVERSION EN CONSERVACION-ABRIL\_2014.pdf - Source A.E.C.

	Fuel consumption gap (%)
Reference: infrastructure with good surface condition (low IRI*)	N/A
Degraded infrastructure (high IRI) - low speed	~ + 4 à 6%
Degraded infrastructure (high IRI) - high speed	~ + 10%

# Europe's Road Transport Performance (New Trends)

## ➤ New trends

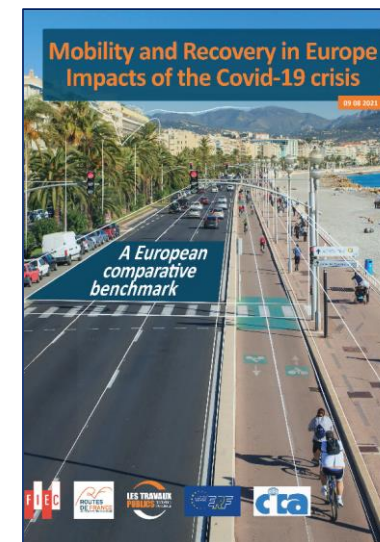
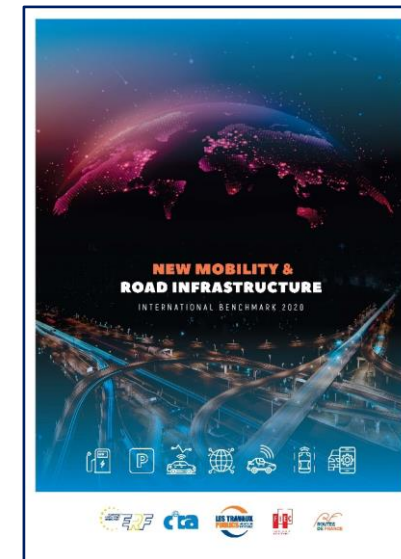
### ➤ Emergence of new mobility patterns and behaviours

- Soft mobility
- Urban environment
- Digitalisation

### ➤ Publication of an International Benchmark Study (Sept. 2020)

## ➤ After the Covid 19 crisis

- Publication of a second Benchmark Study (Sept. 2021)
- European comparative benchmark



# Europe's Road Transport Performance (challenges)

## ➤ Threats and challenges

- Ageing infrastructure (e.g., bridge collapse or long term closures)
- Resilience to disruptions, natural disasters and climate change
- Evolution of traffic
  - Impact of new vehicles (electric, heavier, bigger...) on the road infrastructure and its equipment (e.g., barriers)



# Europe's Road Transport performance (challenges)

## ➤ Threats, challenges, uncertainties

- European Objectives - Green Deal and the decarbonisation of transport
- Impact of the Road Infrastructure sector
- Contribution to these objectives

## ➤ Future European Institutions structure ?

## ➤ European Road Statistics as a helpful tool





# The European Union Road Federation

Thank you for your attention



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