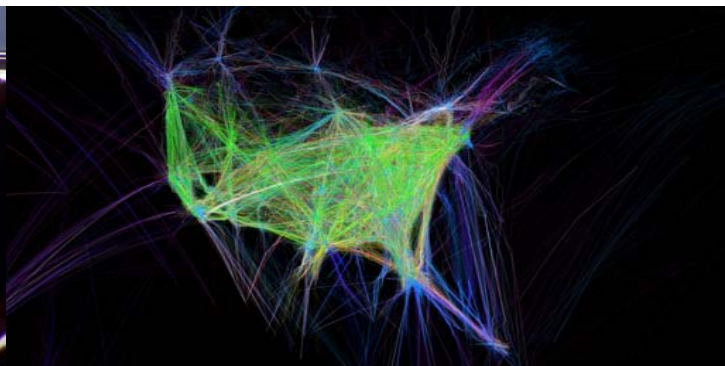


Congestion :

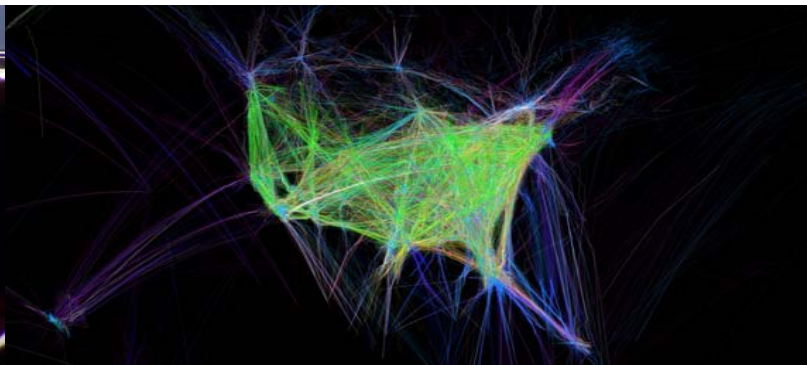
A Global Challenge

Un défi global



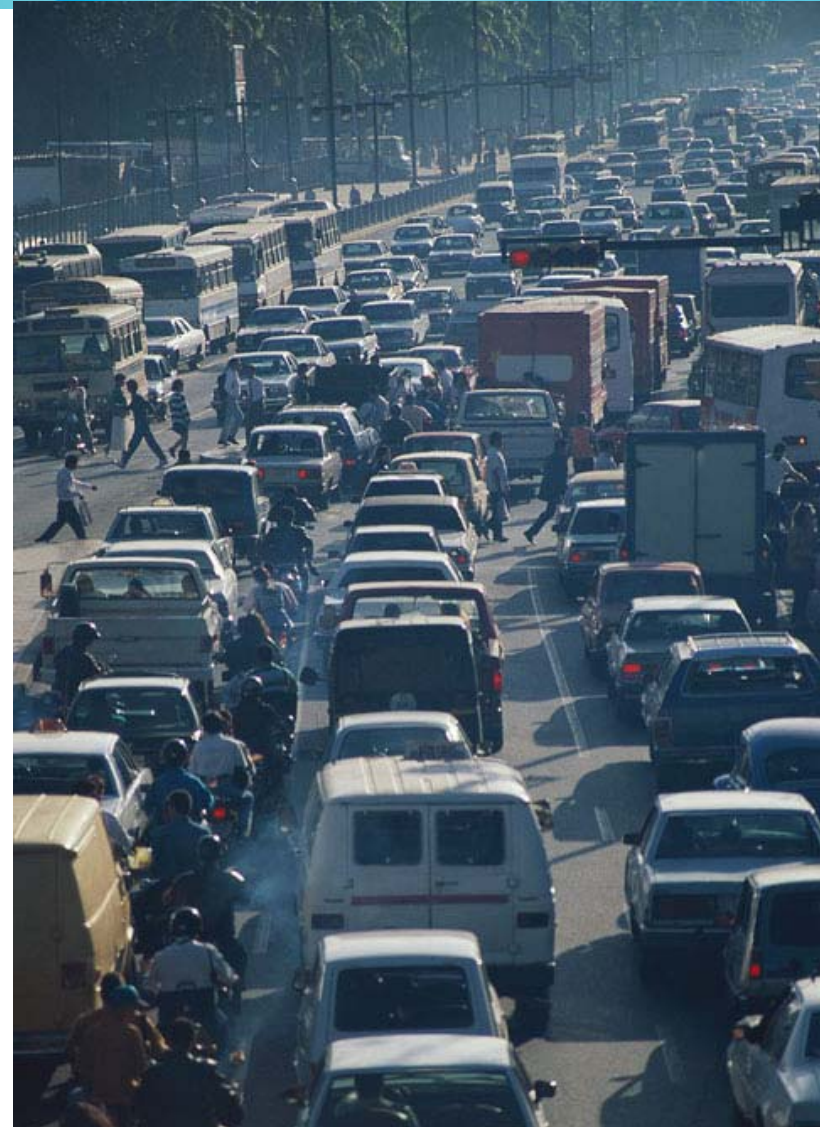
Congestion : Present Situation

Congestion : Situation Actuelle



Chronic congestion on roads in cities and trunk roads near conurbations

Congestion chronique en ville et sur les routes à proximité des grandes agglomérations



Ministerial meeting on MITIGATING CONGESTION

30 - 31 May 2007

Sofra
BULGARIA

20
07



Congestion on roads and
railway serving ports

Congestion sur les routes et
les voies ferrées desservant
les ports



Congestion in
hub airports

Congestion dans les
hubs aéroportuaires



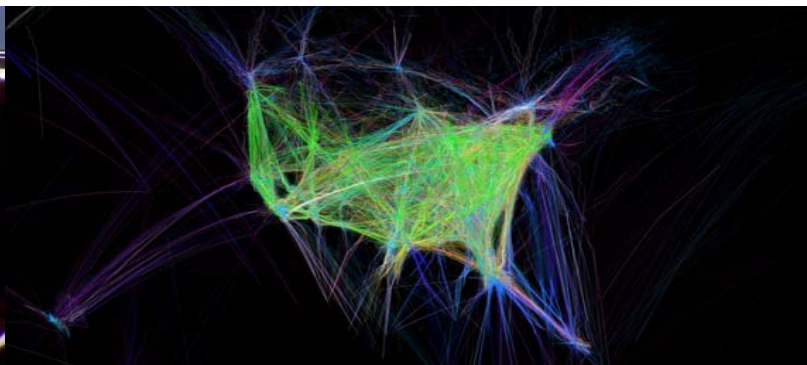
Congestion on
Border Crossings

Congestion aux
points frontaliers



Congestion costs

- USA - 1.6% of GDP, 200 billion Dollars
- EU - 1.1% of GDP, 140 billion Euros
- 1% of GDP on roads alone



Border Crossing costs

Coûts des passages aux frontières

One extra day in customs
Un jour supplémentaire d'attente

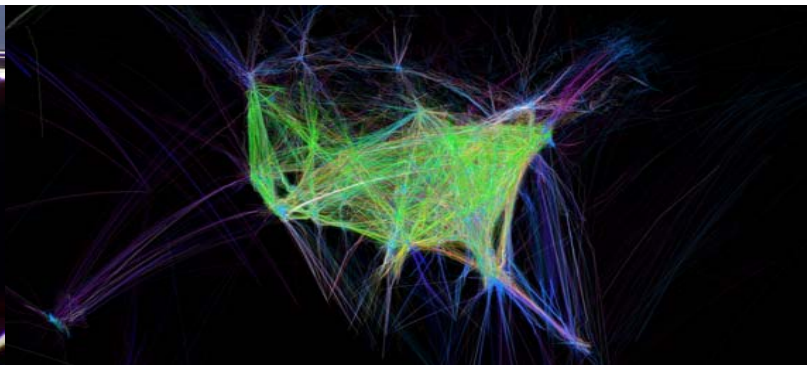
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+ 0.8% Cost increase

Augmentation des coûts + 0.8%

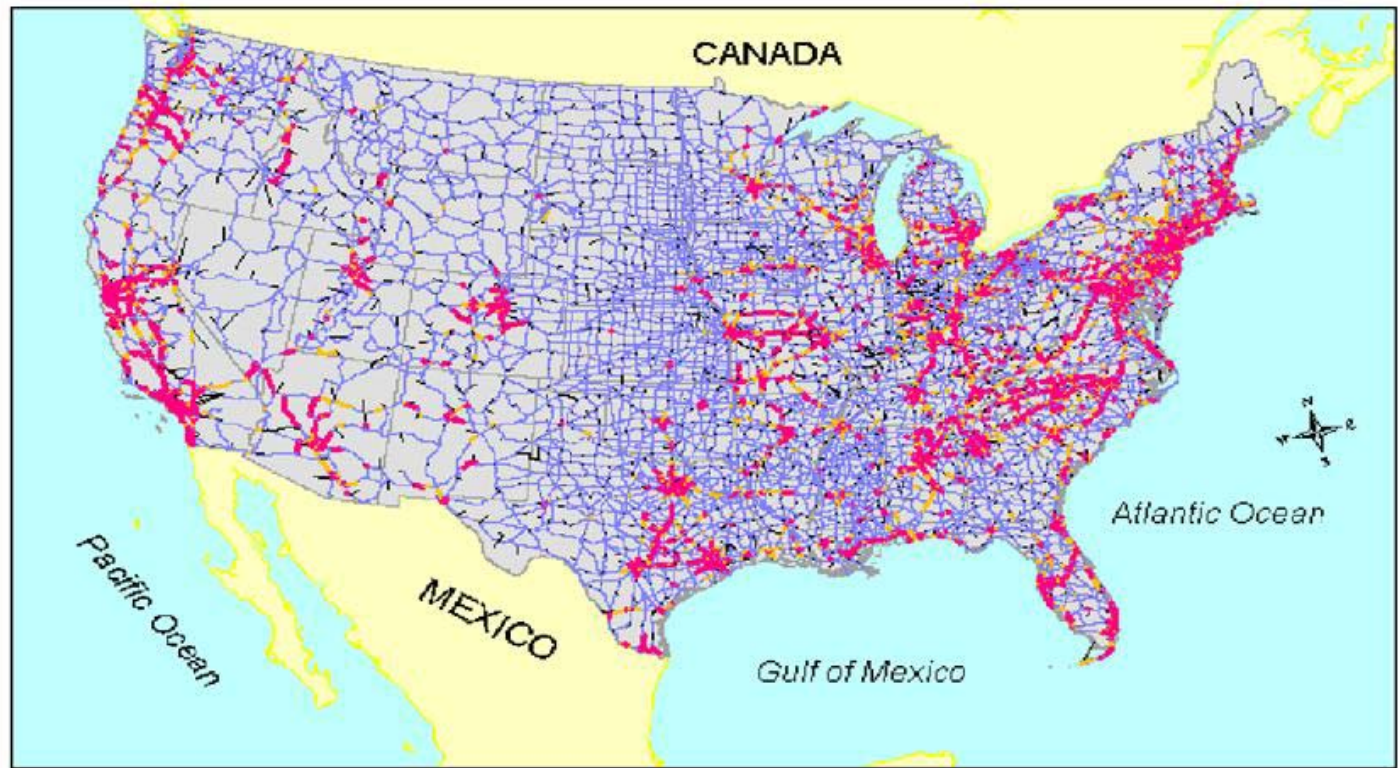
Outlook for congestion

Congestion : Perspectives d'évolution



Road Congestion

Congestion sur les routes

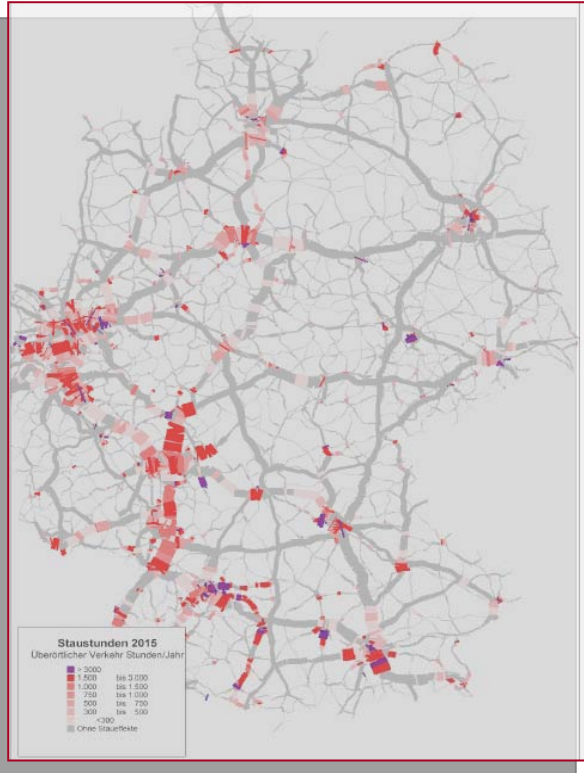


US Department of Transportation
Federal Highway Administration
Office of Freight Management and Operation

Volume-to-Capacity



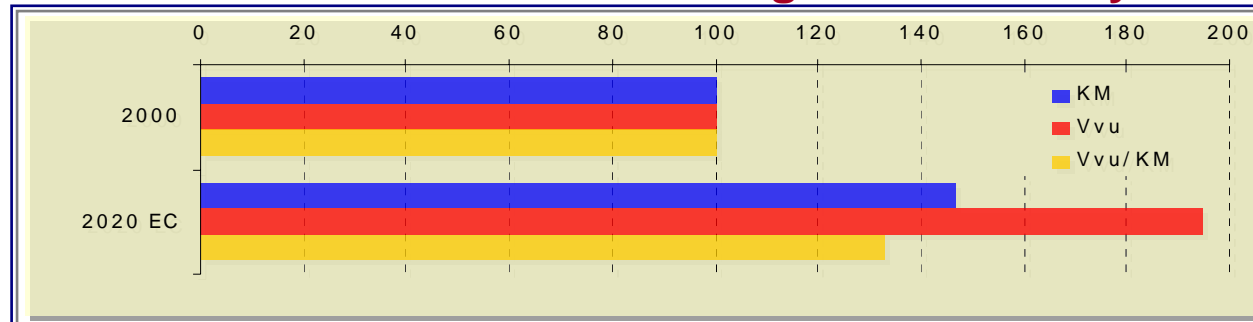
Hours spent in congestion on German roads, 2015 forecast Congestion sur les routes allemandes



Hours per road section:

- >3000
- >1500 - 3000
- >1000 - 1500
- > 750 - 1000
- > 500 - 750
- > 300 - 500
- < 300

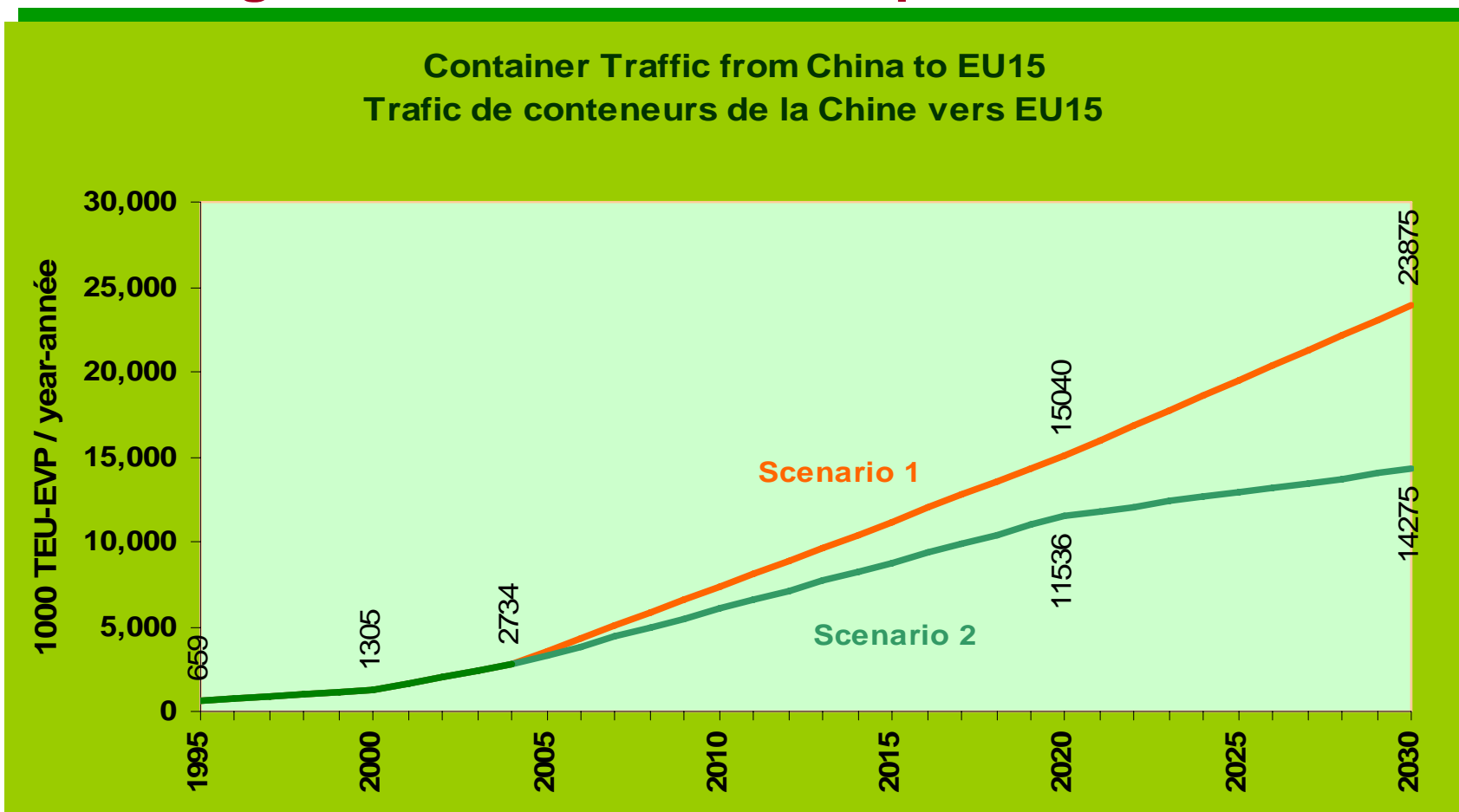
Congestion outlook in the Netherlands Congestion aux Pays-Bas



Congestion increase +30% by 2020 on Dutch motorways

Augmentation de 30% de la congestion sur les autoroutes néerlandais d'ici 2020

Increased congestion of access to sea ports



Congestion accrue dans les accès aux parts

Increased congestion in hub airports

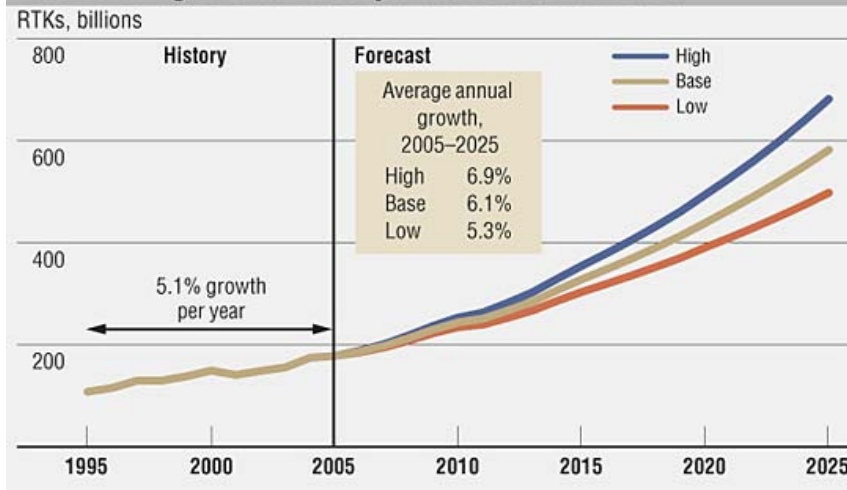
Congestion accrue dans les grands aeroports

Air Passenger Traffic expected to double over the next 20 years

Le trafic aérien de voyageurs pourrait doubler dans les 20 prochaines années

World Air Traffic Outlook

World Air Cargo Traffic Will Triple Over the Next 20 Years

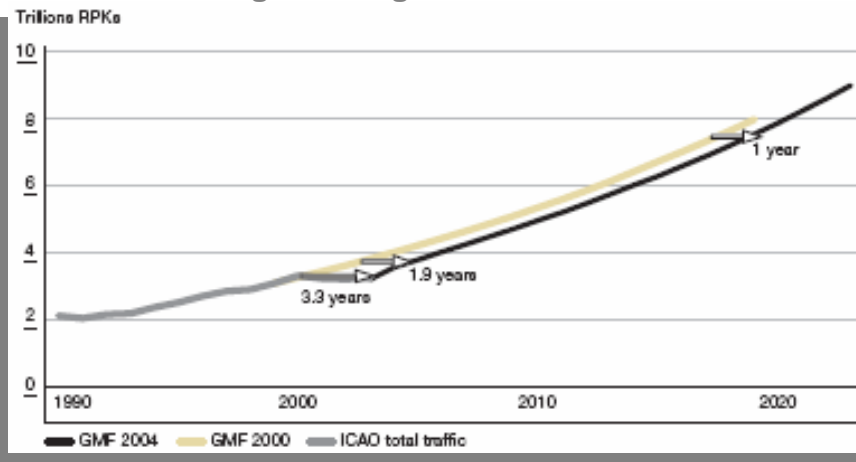


Sources: Airbus for passengers, Boeing for freight

Air Freight Traffic expected to triple over the next 20 years

Le trafic aérien de marchandises pourrait doubler dans les 20 prochaines années

Revenue Earning Passenger Kilometres



Sources: Airbus for passengers, Boeing for freight