

APPENDIX

APPENDIX IIA

**DEMAND FORECAST: DATA TO SECTION 3.5 & 3.6,
CHAPTER 3, PART 2**

**(Forecast criteria, Summary of Traffic Forecast of Case 1 and Case 2,
Details on the Commodity-wise Traffics)**

APPENDIX TO SECTION 3.8

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CEREALS <i>Range between 1-4 Mtpa</i>	Trade - Export Arable Area Yields likely to increase Domestic Consumption EU Policies / Trade Barriers / Tariffs Increased Trade With EU 96 / 99 Exceptional Years Range Between 1-2 Mtpa	Trade - Import Domestic Consumption Harvest - Successful? Evolving Dietary Preferences Moderate Increase Range Between 0-0.75 Mtpa	Transit - Loaded Arable Area - 3rd Countries Yields likely to increase Domestic Consumption - 3rd Countries EU Policies / Trade Barriers / Tariffs Danube Navigability Assess Alternative Transport Routes 96 / 99 Exceptional Years Range Between 0-1 Mtpa	Transit - Discharged Domestic Consumption Harvest - Successful? Danube Navigability Assess Alternative Transport Routes Range Between 0-0.25 Mtpa
TIMBER, FIREWOOD <i>2000 to 2005 - Growth 2005 to 2010 - Constant 2010 to 2020 - Decline</i>	Trade - Export Forest Area under Exploitation Logging Volume Industry Status EU Environmental Regulations Finite Supply - Reforestation? 5% of GDP / 10% of Exports Determine Surpluses	Trade - Import	Transit - Loaded	Transit - Discharged
NATURAL / CHEMICAL FERTILISERS <i>Exports Decrease Imports Increase</i>	Trade - Export Urea Short Term Growth Restructuring of Industry Peak Capacity Domestic Production Decrease Determine Surpluses	Trade - Import Phosphate Rock Not Available Indigenously Yields - Demand Complex Fertilisers NPK Fertilisers Medium to Long Term Growth Agricultural Production Determine Shortfall	Transit - Loaded	Transit - Discharged
IRON ORE / SCRAP <i>Scrap Short Term Growth 2005 to 2010 - Constant / Decline After 2010 Decline Iron Ore 2000 - 2010 - Growth 2010 to 2020 - Constant To Yugoslavia / Hungary - Growth</i>	Trade - Export Mainly Scrap Finite Supply No Processing Capability in Romania Significant Export Earner Current Surpluses will Diminish	Trade - Import SIDEEX Primary User Plant Outdated Industry Restructuring Production Cap at 6.0 Mtpa Process Dictates Requirement EU Regulations Based Upon Plant Requirements	Transit - Loaded Scrap from Ukraine / Moldavia? Volumes in 98/99 Short Term Growth Finite Supply No Indigenous Processing Capability Current Surpluses will Diminish	Transit - Discharged Mainly Barge Traffic to Ukraine Barge Traffic to Yugoslavia? Similar Considerations as Trade Import Danube Navigability Based Upon Plant Requirements
NON-FERROUS ORE <i>Short Term Growth After 2005 - Constant</i>	Trade - Export	Trade - Import Mainly Bauxite? Copper Concentrate ? Process Dictates Requirement Industry Restructuring Based Upon Plant Requirements	Transit - Loaded Unclear ??? Unclear	Transit - Discharged Demand from Yugoslavia / Hungary Process Dictates Requirement Similar Considerations as Trade Import Danube Navigability Based Upon Plant Requirements
SOLID FUEL (COAL / COKE / ETC.) <i>Short Term Growth After 2010 - Constant Plant Requirements from OCDI</i>	Trade - Export Mainly Coke Industry Restructuring Process Dictates Requirement Based Upon Plant Requirements	Trade - Import SIDEEX Primary User Plant Outdated Industry Restructuring Production Cap at 6.0 Mtpa Process Dictates Requirement EU Regulations Based Upon Plant Requirements	Transit - Loaded	Transit - Discharged
CRUDE OIL <i>Consumption Growth 1.0% pa World Energy Outlook 2000 - EIA Annual Energy Outlook 2001 - EIA</i>	Trade - Export	Trade - Import Domestic Production Consumption will Increase Industry Restructuring Media Refinery Major User Consumption / Refining Capacity	Transit - Loaded	Transit - Discharged Demand from Yugoslavia / Hungary Similar Considerations as Trade Import Danube Navigability Consumption / Refining Capacity
OIL AND GAS PRODUCTS <i>Overall Growth 2.3% pa Gasoline Growth 1.9% pa Diesel Growth 2.5% pa Jet Fuel Growth 4.5% pa Residual Fuel 1.5% pa World Energy Outlook 2000 - EIA Annual Energy Outlook 2001 - EIA</i>	Trade - Export Lower Grade Gasoline EU Regulations Industry Restructuring Long Term Decline Industry Status	Trade - Import Premium Grade Gasoline Consumption will Increase Refining Capacity Limited Consumption / Refining Capacity	Transit - Loaded	Transit - Discharged
CHEMICAL PRODUCTS <i>Short Term Constant Medium to Long Term Decline Current Average 800,000 tpa Long Term Decline to 500,000 tpa</i>	Trade - Export Primarily Petrochemicals EU Regulations Industry Restructuring Long Term Decline Media Refinery Add-on? Industry Status	Trade - Import	Transit - Loaded	Transit - Discharged
CEMENT, CONSTR. MATERIALS <i>Short Term Constant Medium to Long Term Decline Current Average 2,000,000 tpa Long Term Decline to 1,000,000 tpa</i>	Trade - Export Primarily from Medgidia - Best Facility Foreign Ownership Plant Closures Industry Restructuring Capacity Limited Increased Domestic Demand Long Term Decline Domestic Cons./Production Capacity	Trade - Import	Transit - Loaded	Transit - Discharged
FERROUS / NON-FERROUS METALS <i>Growth as per SIDEEX Capacity</i>	Trade - Export SIDEEX Primary Producer Plant Outdated Industry Restructuring Production Cap at 6.0 Mtpa Capacity Tied to Ore Imports Process Dictates Volumes Competition with FSU/China/Korea ... Based Upon Plant Capacity	Trade - Import	Transit - Loaded Primarily Hungarian Production Previously Yugoslavian Production Similar Considerations as Trade Danube Navigability Assess Alternative Transport Routes Industry Status / Transport Routes	Transit - Discharged
VARIOUS MANUFACTURED PRODS. <i>Identical to GDP Growth</i>	Trade - Export Mainly containerisable cargoes High correlation to GDP growth One is to one relationship with GDP As per Container Terminal Forecast	Trade - Import Mainly containerisable cargoes High correlation to GDP growth One is to one relationship with GDP As per Container Terminal Forecast	Transit - Loaded	Transit - Discharged

CASE 1 - TOTAL TRAFFIC DEMAND FORECAST (MICRO AND MACRO ANALYSIS)

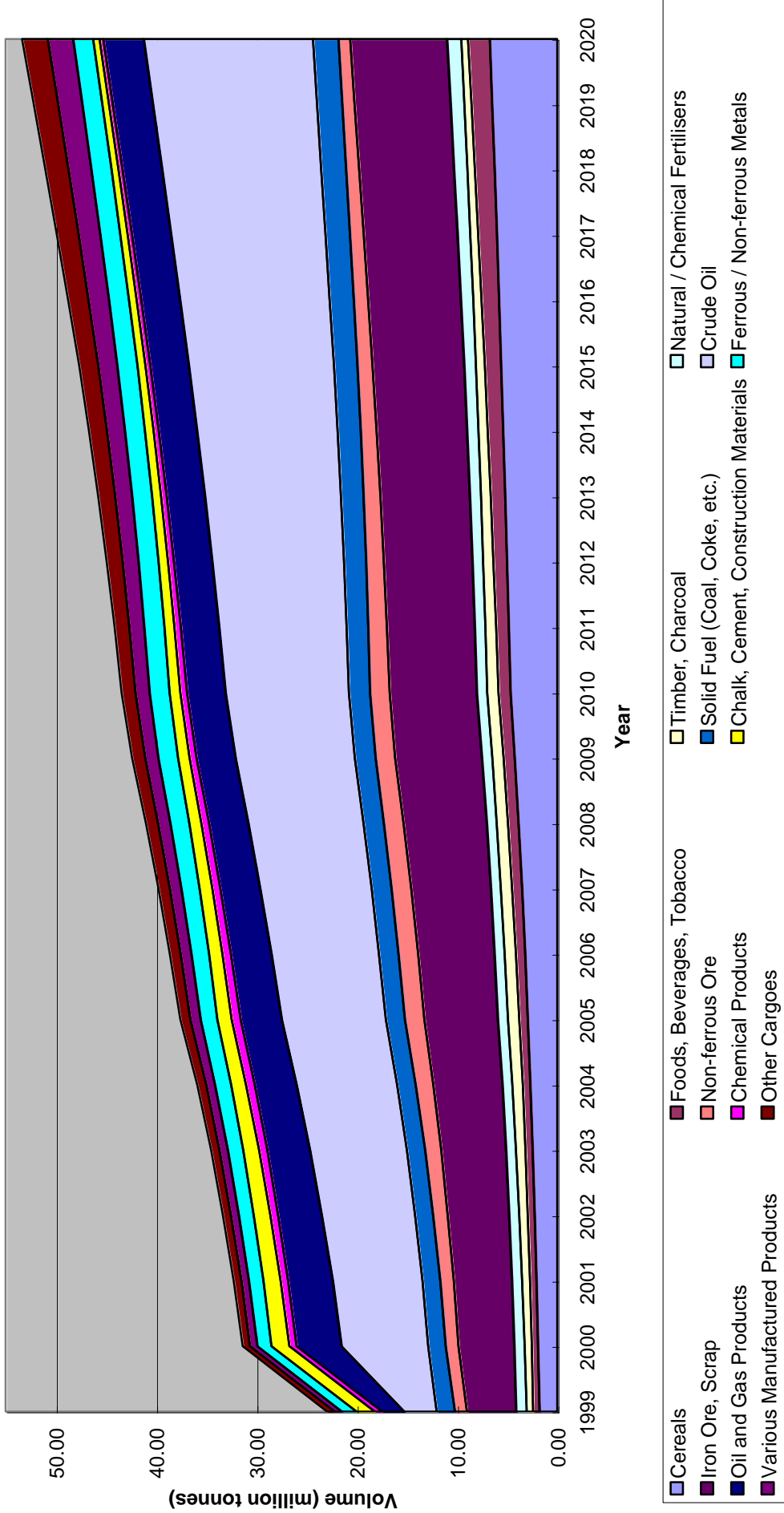
Notes

- 1. Red rows indicate commodities that are not significant for that particular trade, i.e., red rows under EXPORT indicate that the commodities are only significant IMPORTS, and vice versa.
- 2. Yellow cells indicate that the average share of total traffic of that particular commodity has increased when compared to the average share of total traffic of that particular commodity, between 1994 - 1999.
- 3. Blue cells indicate that the average share of total traffic of that particular commodity, between 1999 - 2020, has decreased when compared to the average share of total traffic of that particular commodity, between 1994 - 1999.

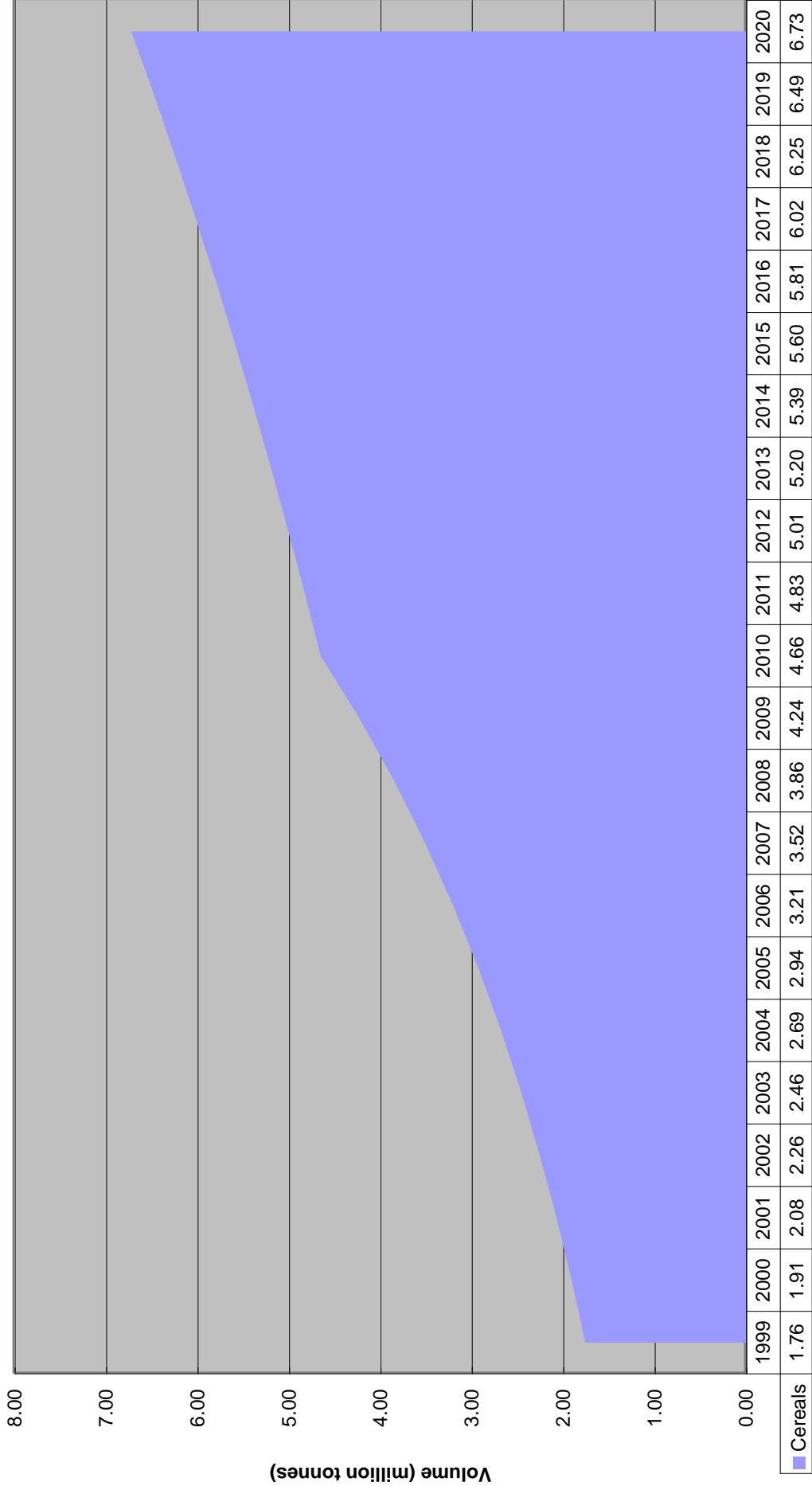
TOTAL VOLUMES GDP Growth	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	94-99	99-2020	99-2020		
	-3.2%	2.0%	3.0%	5.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	5.5%	5.0%	4.5%	4.0%	Average	Average	Average		
	100.0%	102.0%	105.1%	110.3%	115.8%	122.8%	130.1%	138.0%	146.2%	155.0%	164.3%	174.2%	184.6%	195.7%	207.4%	219.9%	233.1%	247.1%	260.6%	273.7%	286.0%	297.4%	Share	Share	Share		
Cereals	DB	1.76	1.91	2.08	2.26	2.45	2.69	2.94	3.21	3.52	3.86	4.24	4.65	5.01	5.20	5.39	5.60	5.81	6.02	6.25	6.49	6.73	4.1%	4.1%	10.0%		
Foods, Beverages, Tobacco	DB/CT	0.64	0.63	0.64	0.68	0.71	0.75	0.86	0.92	0.94	1.12	1.19	1.27	1.35	1.44	1.53	1.63	1.74	1.85	1.96	2.07	2.17	2.27	3.0%	3.0%	1.23	
Timber, Charcoal	BB	0.64	0.70	0.77	0.85	0.93	1.03	1.13	1.13	1.13	1.13	1.13	1.13	1.07	1.02	0.97	0.92	0.87	0.83	0.79	0.75	0.71	0.68	1.1%	0.9%	2.2%	
Natural / Chemical Fertilisers	DB/BB	1.08	1.05	1.04	1.03	1.02	1.01	1.00	1.00	1.01	1.03	1.04	1.07	1.09	1.12	1.16	1.20	1.25	1.29	1.34	1.38	1.43	5.9%	5.9%	2.7%		
Iron Ore, Scrap	DB/BB	4.97	5.55	5.77	6.10	6.45	6.87	7.32	7.81	8.33	8.85	9.38	9.92	10.47	11.03	11.61	12.20	12.80	13.41	14.03	14.65	15.28	15.91	16.54	16.3%	16.3%	8.00
Non-ferrous Ore	DB	1.20	1.29	1.35	1.47	1.60	1.77	1.95	2.15	2.36	2.59	2.84	3.10	3.37	3.64	3.91	4.18	4.45	4.72	5.00	5.27	5.54	5.81	3.5%	3.5%	1.60	
Solid Fuel (Coal, Coke, etc.)	DB	1.84	1.74	1.76	1.79	1.82	1.86	1.90	1.94	1.98	2.02	2.07	2.11	2.15	2.20	2.25	2.29	2.34	2.39	2.44	2.48	2.52	2.55	9.6%	9.6%	2.11	
Crude Oil	LB	3.21	3.64	3.97	4.31	4.65	5.00	5.35	5.70	6.05	6.40	6.75	7.10	7.45	7.80	8.15	8.50	8.85	9.20	9.55	9.90	10.25	10.60	10.95	23.4%	23.4%	12.05
Oil and Gas Products	LB	2.21	2.49	2.76	3.03	3.30	3.57	3.84	4.11	4.38	4.65	4.92	5.19	5.46	5.73	6.00	6.27	6.54	6.81	7.08	7.35	7.62	7.89	4.0%	4.0%	3.93	
Chemical Products	LB/BB	0.75	0.72	0.74	0.77	0.81	0.86	0.91	0.96	1.01	1.06	1.11	1.16	1.21	1.26	1.31	1.36	1.41	1.46	1.51	1.56	1.61	1.66	2.8%	2.8%	0.65	
Chalk, Cement, Construction Materials	DB/BB	1.92	1.78	1.73	1.65	1.58	1.49	1.41	1.34	1.26	1.20	1.13	1.07	1.01	0.96	0.91	0.86	0.81	0.77	0.73	0.70	0.67	0.64	6.8%	6.8%	1.16	
Ferrous / Non-ferrous Metals	BB	1.45	1.42	1.45	1.50	1.55	1.61	1.68	1.75	1.83	1.90	1.98	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	5.6%	5.6%	1.82	
Various Manufactured Products	BB/CT	0.71	0.73	0.75	0.79	0.83	0.88	0.90	0.94	0.97	1.00	1.03	1.06	1.09	1.12	1.15	1.18	1.21	1.24	1.27	1.30	1.33	1.36	2.1%	2.1%	3.5%	
Other Carriers	BB/CT	0.77	0.78	0.79	0.80	0.81	0.82	0.83	0.84	0.85	0.86	0.87	0.88	0.89	0.90	0.91	0.92	0.93	0.94	0.95	0.96	0.97	0.98	1.4%	1.4%	1.44	
TOTAL	22.96	31.37	32.25	33.34	34.51	35.88	37.57	38.62	39.71	40.72	42.30	43.44	44.14	44.91	45.76	46.67	47.67	48.76	49.88	51.03	52.28	53.35	100.0%	100.0%	41.70		
Containerisable Cargo	2.13	2.08	2.15	2.25	2.37	2.51	2.67	2.83	3.00	3.17	3.48	3.72	3.98	4.23	4.50	4.79	5.10	5.43	5.80	6.17	6.54	6.90	7.25				
Containerisation Rate	45%	49%	52%	56%	59%	63%	66%	70%	73%	77%	80%	81%	82%	83%	84%	85%	86%	87%	88%	89%	90%	90%					
Containerised Cargo	0.94	1.05	1.17	1.33	1.48	1.81	2.02	2.29	2.54	2.87	3.18	3.43	3.69	3.89	4.29	4.62	4.99	5.37	5.76	6.14	6.53						
Macro Basis Forecast	21.16	21.75	22.88	24.02	25.47	26.99	28.61	30.33	32.15	34.08	36.12	38.29	40.59	43.02	45.61	48.34	51.24	54.06	56.76	59.32	61.69						

TRADE EXPORT - LOADED GDP Growth	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	94-99	99-2020	99-2020	
	-3.2%	2.0%	3.0%	5.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	5.5%	5.0%	4.5%	4.0%	Average	Average	Average	
	100.0%	102.0%	105.1%	110.3%	115.8%	122.8%	130.1%	138.0%	146.2%	155.0%	164.3%	174.2%	184.6%	195.7%	207.4%	219.9%	233.1%	247.1%	260.6%	273.7%	286.0%	297.4%	Share	Share	Share	
Cereals	DB/BB	1.01	1.06	1.12	1.19	1.26	1.34	1.42	1.50	1.59	1.68	1.77	1.86	1.95	2.04	2.10	2.16	2.21	2.25	2.29	2.33	2.37	2.41	6.5%	6.5%	15.0%
Foods, Beverages, Tobacco	BB/CT	0.14	0.14	0.15	0.16	0.17	0.18	0.19	0.21	0.22	0.23	0.24	0.26	0.28	0.29	0.31	0.33	0.35	0.37	0.38	0.40	0.42	0.43	0.2%	0.2%	0.25
Timber, Charcoal	BB	0.64	0.70	0.77	0.85	0.93	1.03	1.13	1.13	1.13	1.13	1.13	1.13	1.07	1.02	0.97	0.92	0.87	0.83	0.79	0.75	0.71	0.68	4.2%	4.2%	0.92
Natural / Chemical Fertilisers	DB/BB	0.68	0.67	0.68	0.61	0.58	0.54	0.47	0.44	0.41	0.38	0.36	0.33	0.31	0.29	0.27	0.25	0.24	0.22	0.21	0.20	0.19	0.18	12.5%	12.5%	3.4%
Iron Ore, Scrap	DB/BB	0.62	0.68	0.75	0.82	0.90	1.00	1.10	1.04	0.99	0.94	0.89	0.85	0.76	0.69	0.62	0.56	0.50	0.45	0.41	0.36	0.33	0.30	1.8%	1.8%	0.71
Non-ferrous Ore	DB	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%	0.0%	0.00	
Solid Fuel (Coal, Coke, etc.)	DB	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%	0.0%	0.00	
Crude Oil	LB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%	0.0%	0.00	
Oil and Gas Products	LB	1.38	3.65	3.57	3.43	3.30	3.16	3.01	2.88	2.75	2.62	2.51	2.39	2.29	2.18	2.09	1.99	1.90	1.82	1.74	1.68	1.62	1.57	24.3%	24.3%	2.43
Chemical Products	LB/BB	0.70	0.72	0.74	0.77	0.81	0.86	0.91	0.96	1.01	1.06	1.11	1.16	1.21	1.26	1.31	1.36	1.41	1.46	1.51	1.56	1.61	1.66	7.3%	7.3%	0.64
Chalk, Cement, Construction Materials	DB/BB	1.81	1.78	1.73	1.65	1.58	1.49	1.41	1.34	1.26	1.20	1.13	1.07	1.01	0.96	0.91	0.86	0.81	0.77	0.73	0.70	0.67	0.64	18.3%	18.3%	1.16
Ferrous / Non-ferrous Metals	BB	1.33	1.35	1.38	1.43	1.48	1.54	1.61	1.67	1.74	1.81	1.89	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	14.5%	14.5%	1.73
Various Manufactured Products	BB/CT	0.36	0.37	0.38	0.40	0.42	0.44	0.47	0.53	0.58	0.63	0.68	0.74	0.78	0.84	0.89	0.94	0.99	1.04	1.09	1.14	1.19	1.24	1.2%	1.2%	0.65
Other Carriers	BB/CT	0.62	0.63	0.65	0.69	0.72	0.76	0.81	0.86	0.91	0.96	1.02	1.08	1.15	1.22	1.29	1.37	1.45	1.54	1.62	1.70	1.78	1.85	3.5%	3.5%	1.12
TOTAL	8.61	11.75	11.87	11.98	12.13	12.30	12.51	12.39	12.29	12.19	12.12	11.94	11.79	11.67	11.58	11.51	11.50	11.50	11.52	11.56	11.61	100.0%	100.0%	11.79		
Containerisable Cargo	1.12	1.14	1.18	1.24	1.30	1.38	1.46	1.55	1.64	1.74	1.84	1.96	2.07	2.20	2.33	2.47	2.62	2.77	2.92	3.07	3.21	3.34				
Containerisation Rate	45%	49%	52%	56%	59%	63%	66%	70%	73%	77%	80%	81%	82%	83%	84%	85%	86%	87%	88%	89%	90%	90%				
Containerised Cargo	0.52	0.58	0.64	0.73	0.81	0.92	1.02	1.15	1.27	1.42	1.56	1.68	1.80	1.93	2.07	2.22	2.38	2.54	2.70	2.86	3.00					
Macro Basis Forecast	8.16	8.41	8.83	9.27	9.82	10.41	11.04	11.70	12.40	13.15	13.93	14.77	15.66	16.60												

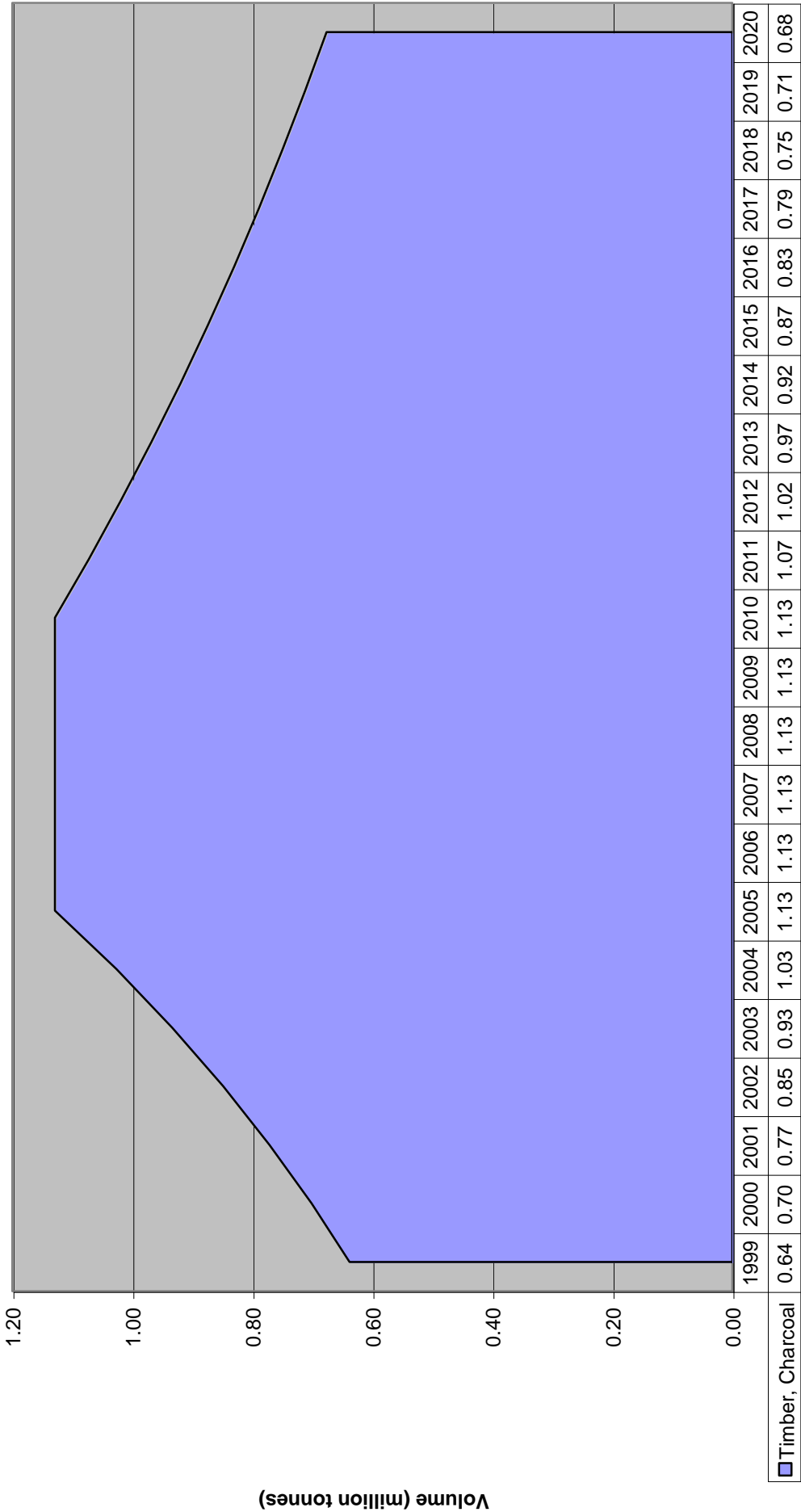
Forecast Volumes at Constantza 1999 - 2020 (Case 1)



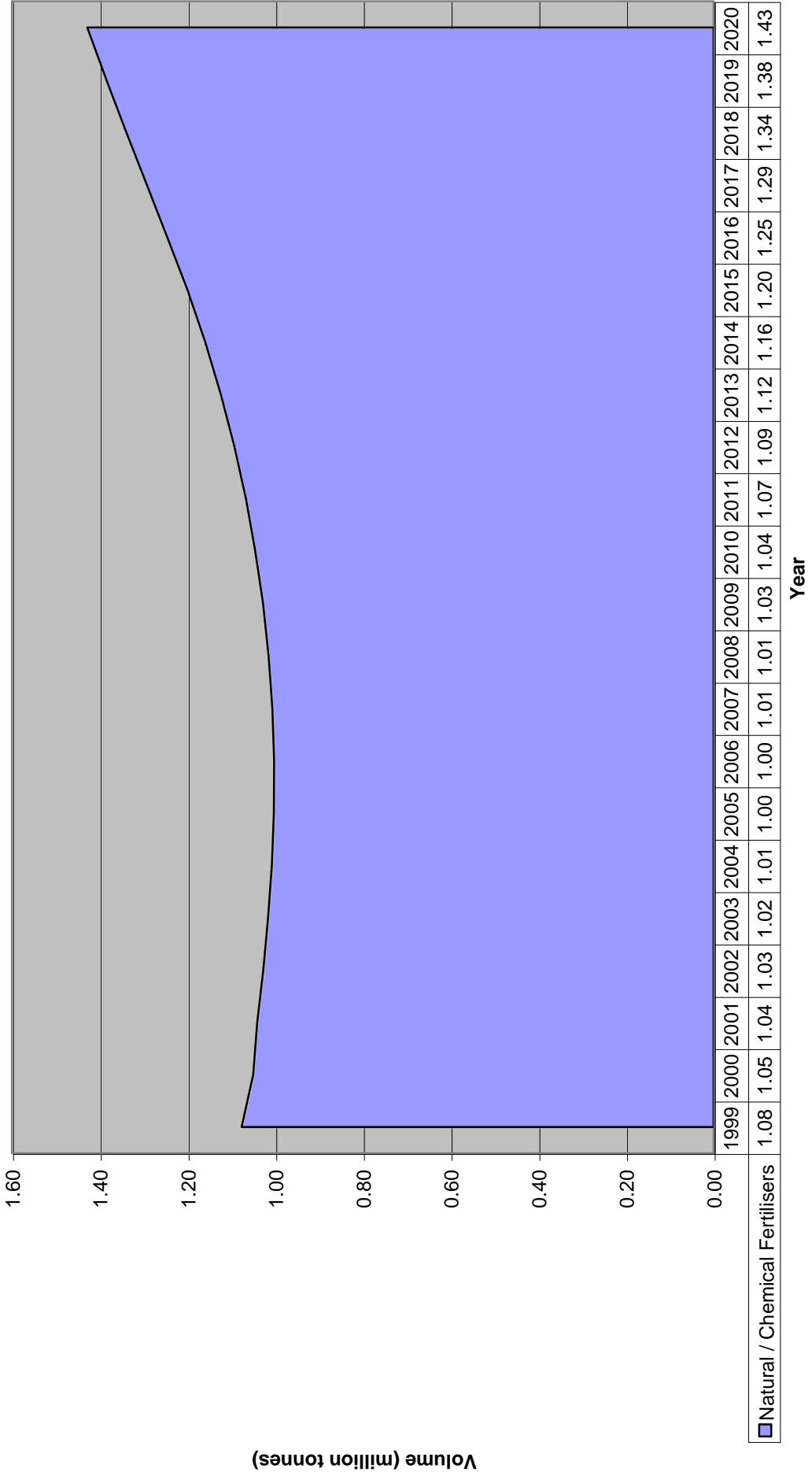
Cereals - Case 1



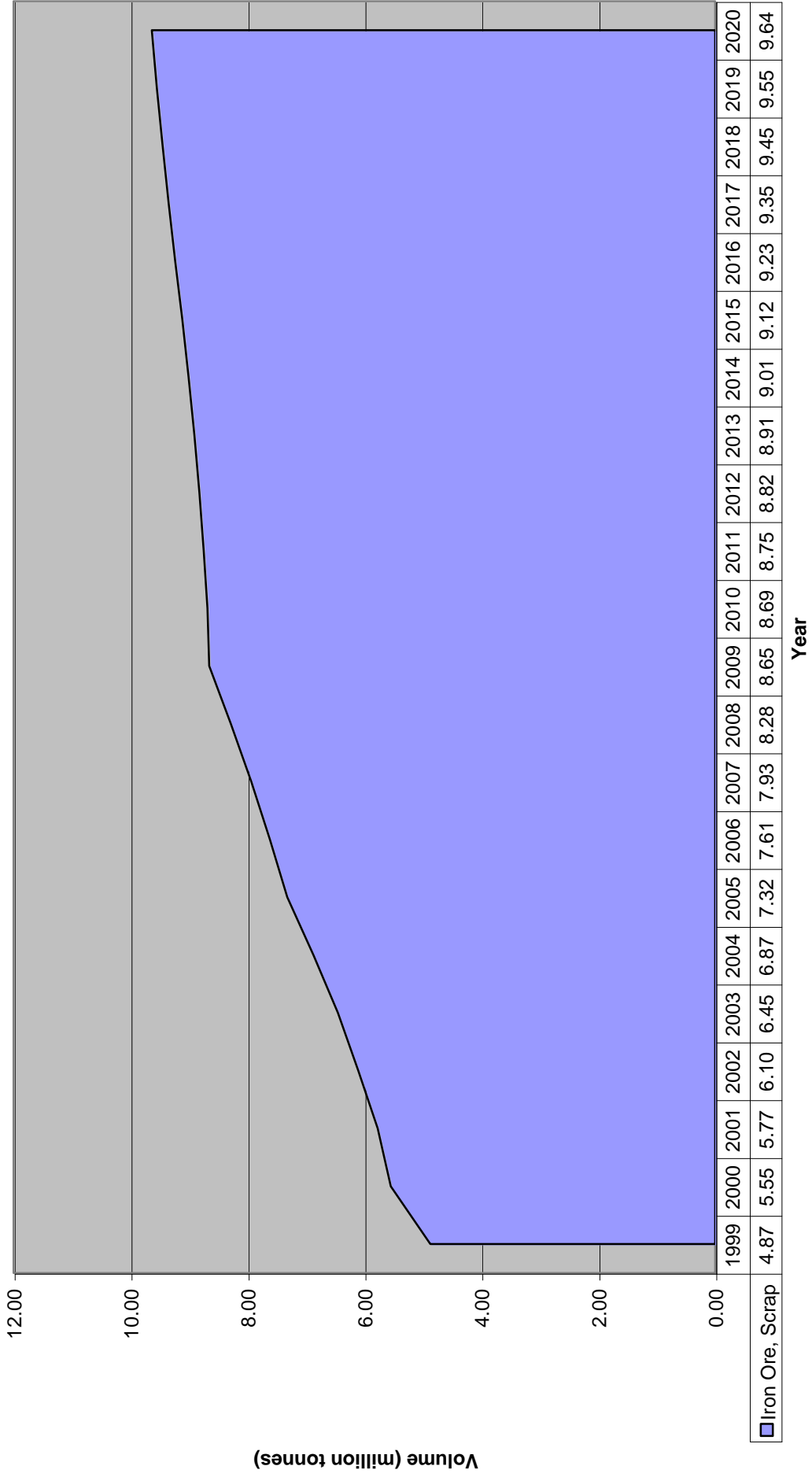
Timber, Charcoal - Case 1



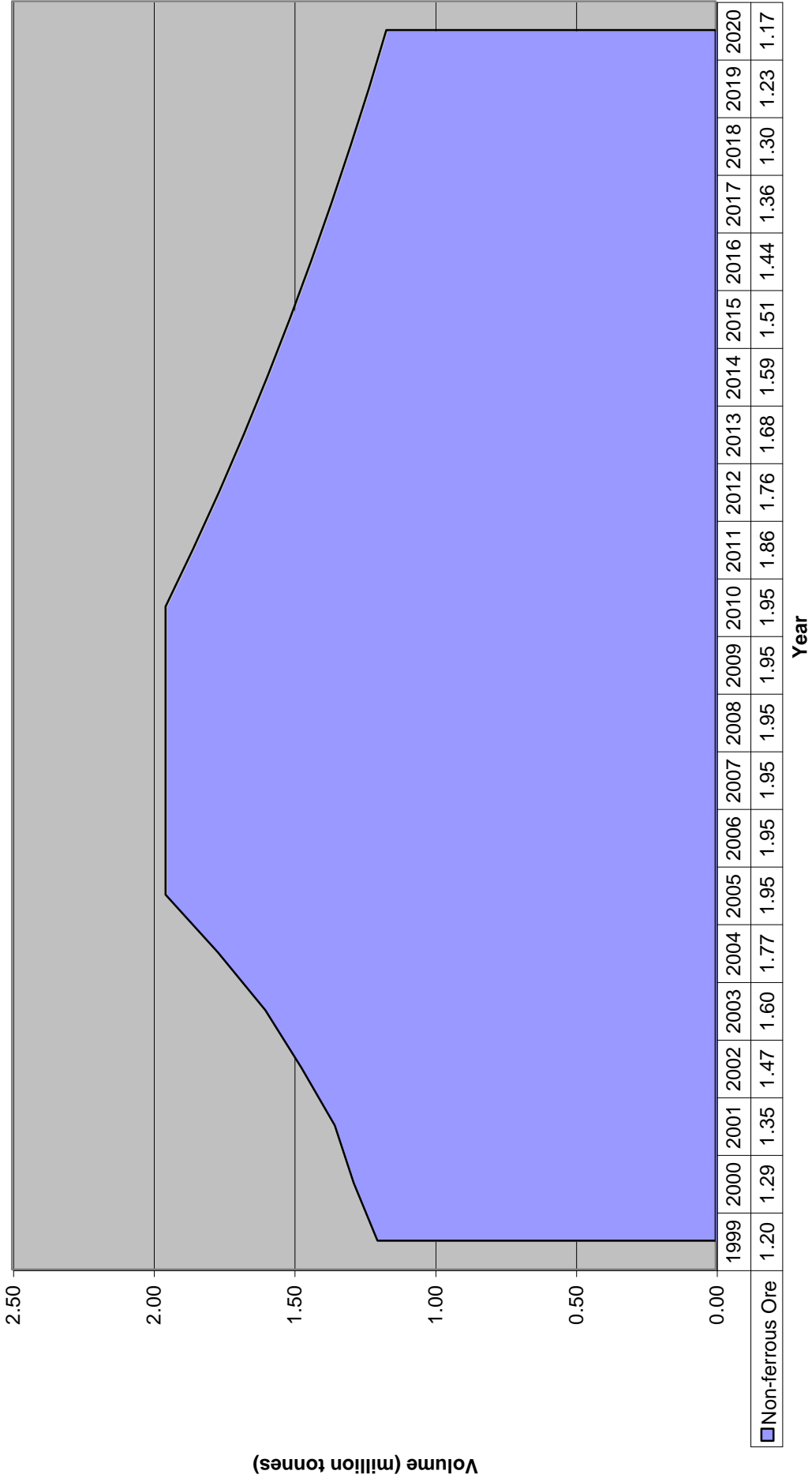
Natural / Chemical Fertilisers - Case 1



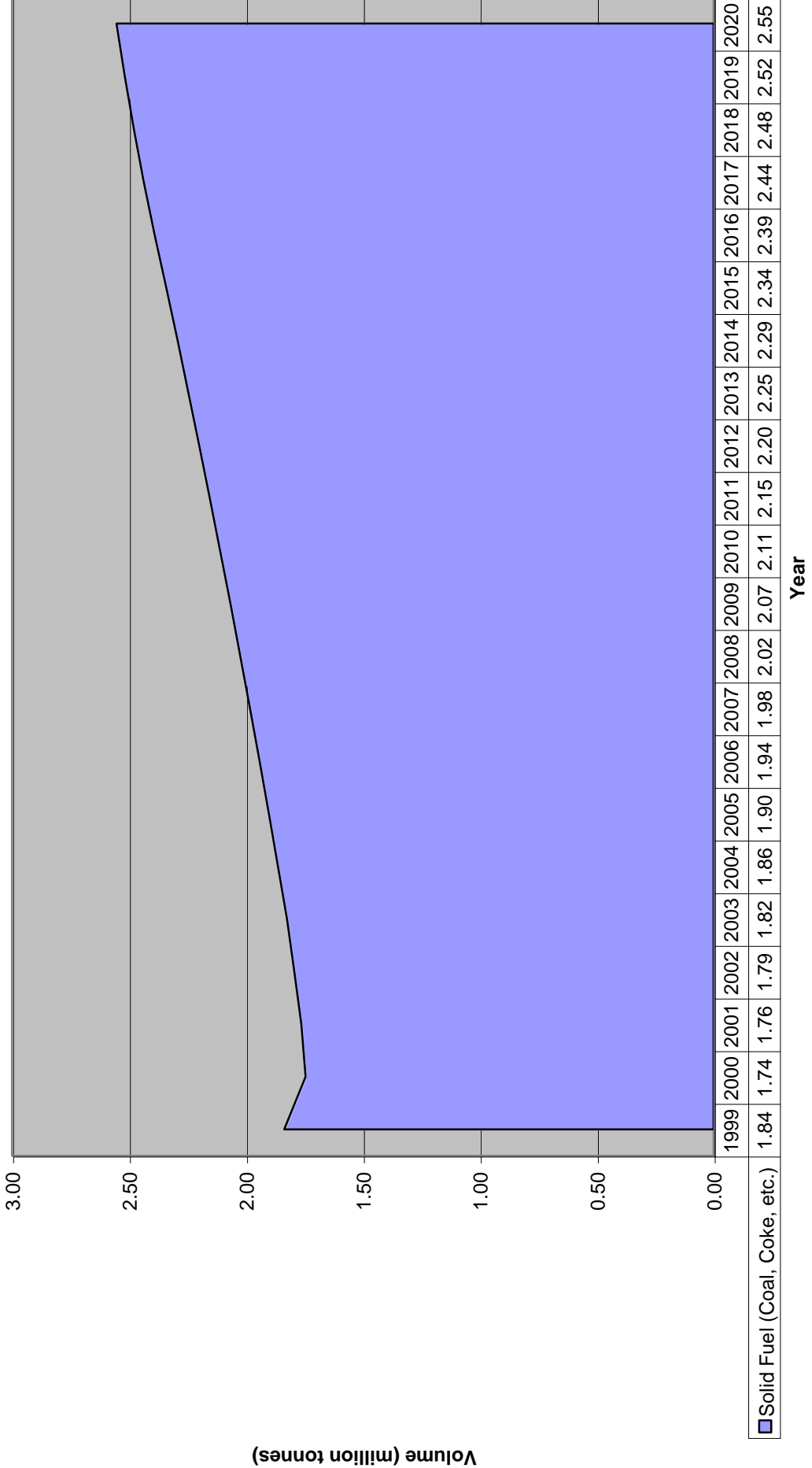
Iron Ore, Scrap - Case 1



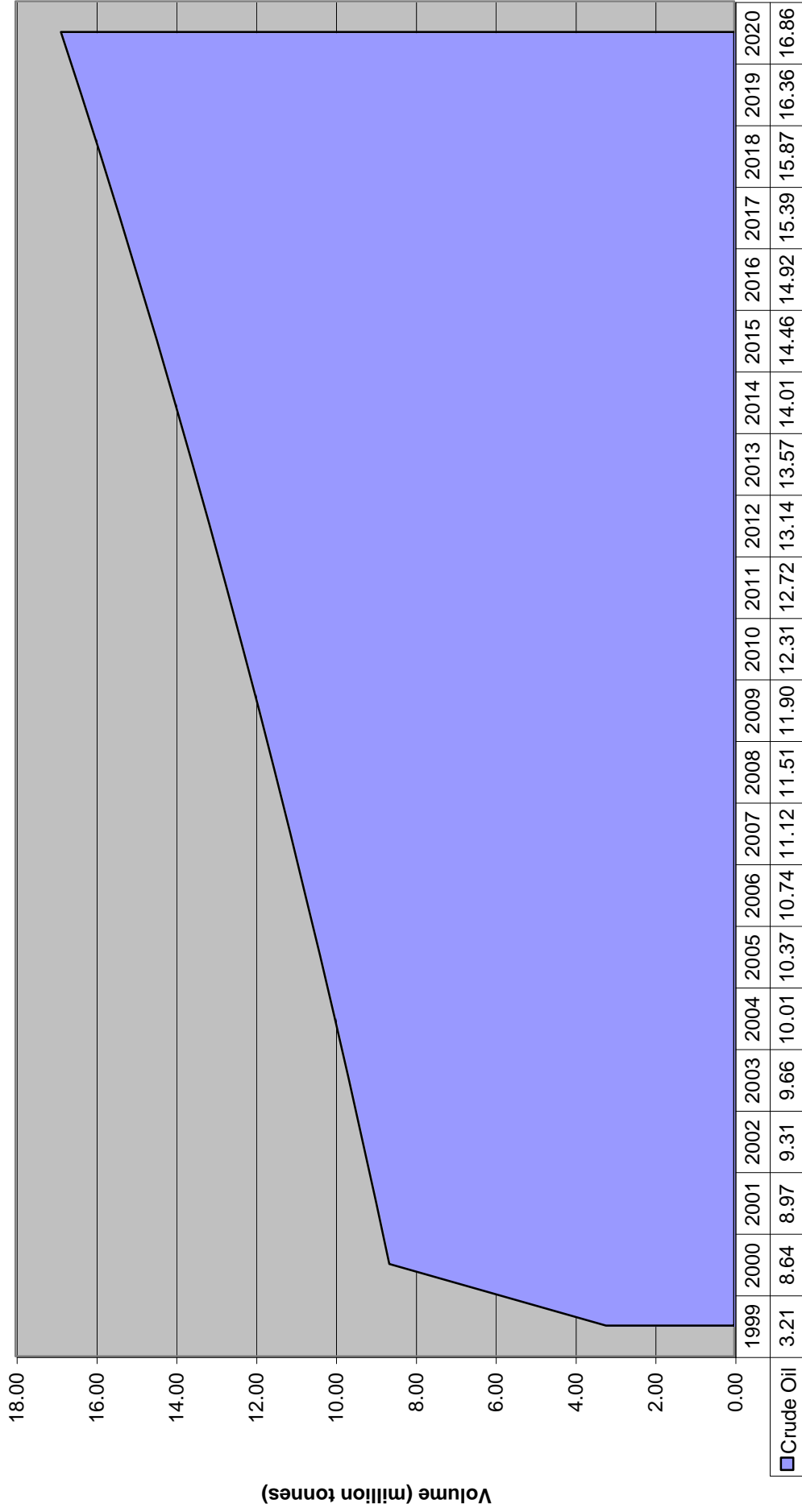
Non-ferrous Ore - Case 1



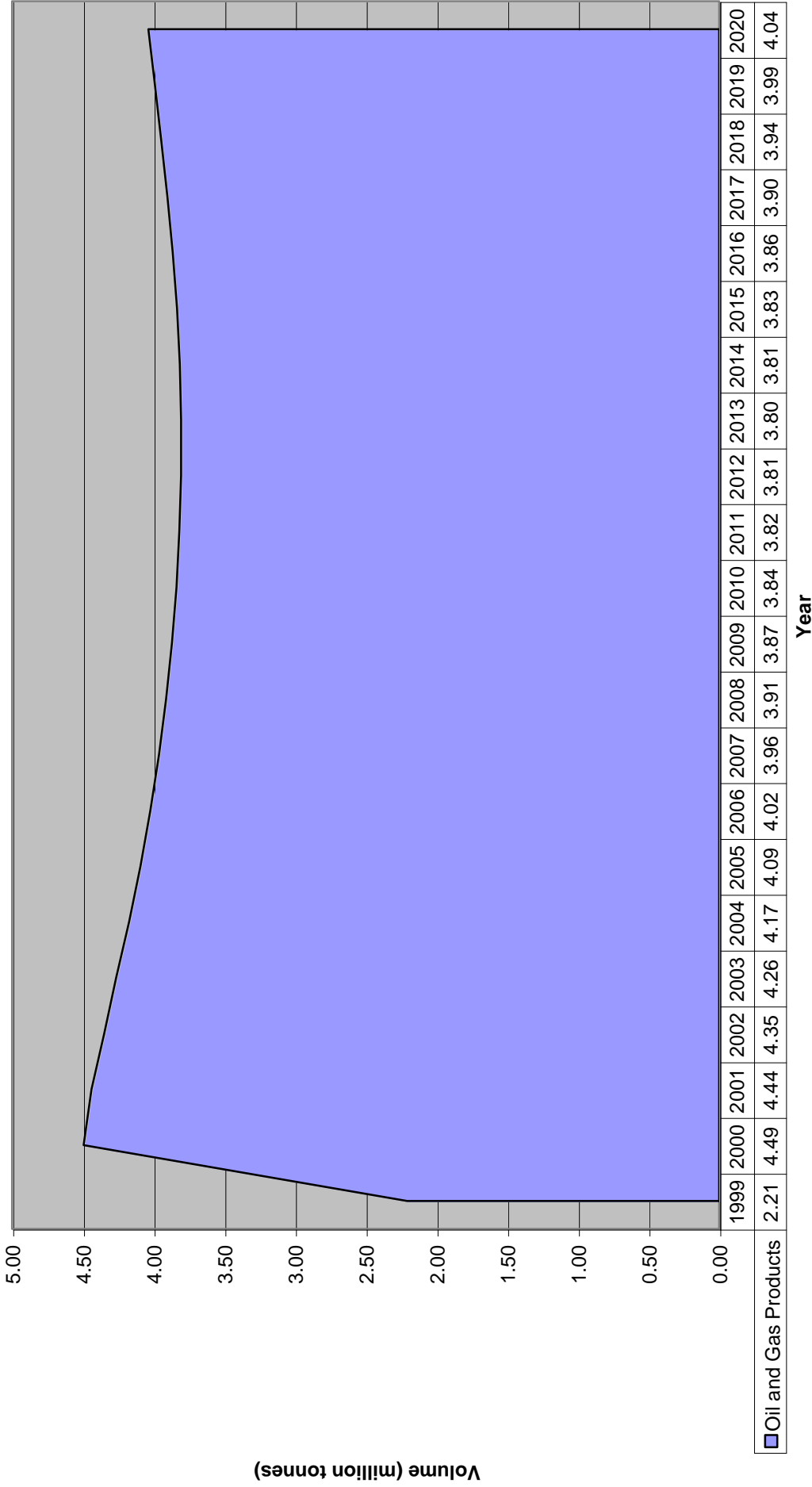
Solid Fuel (Coal, Coke, etc.) - Case 1



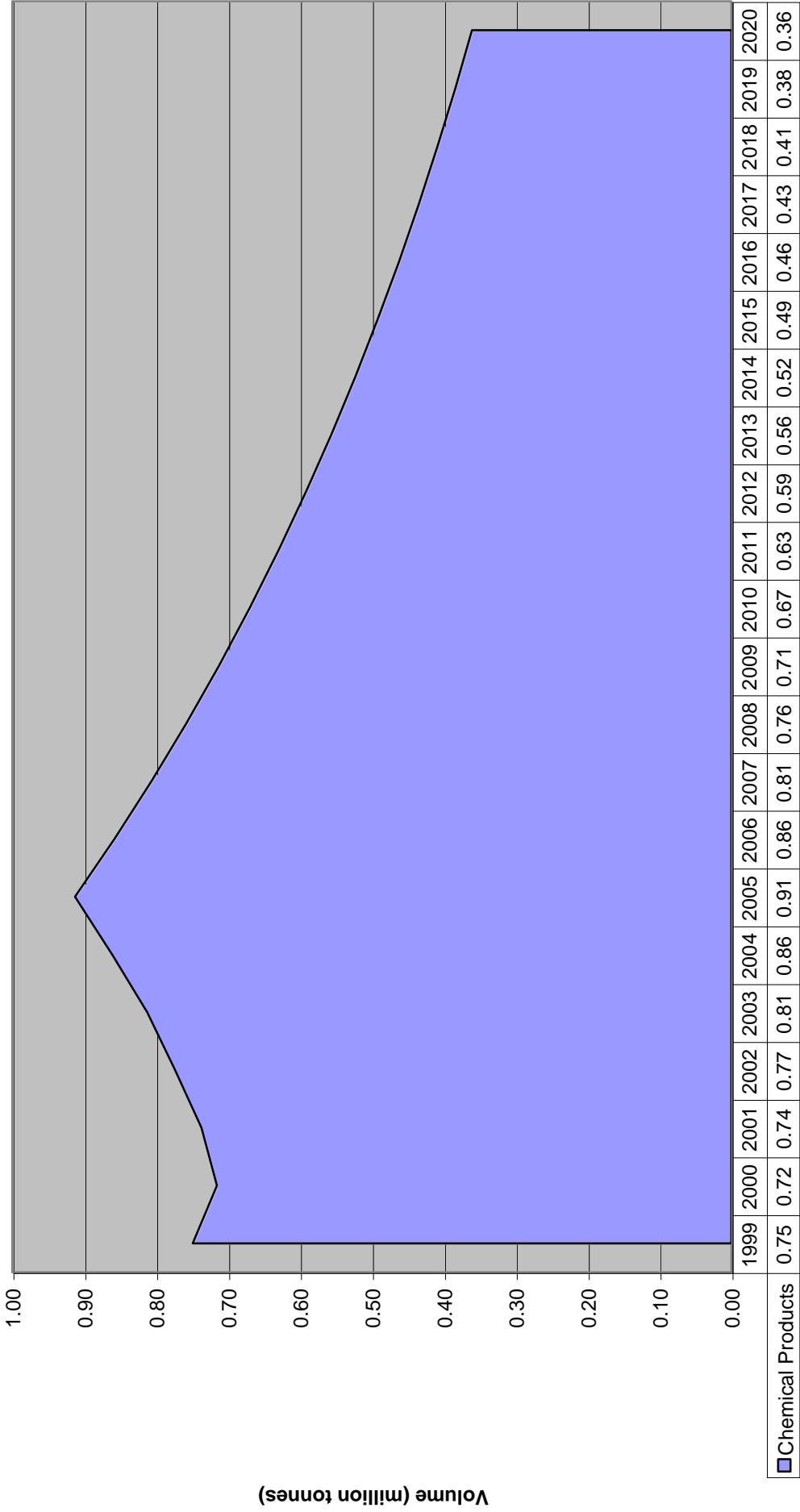
Crude Oil - Case 1



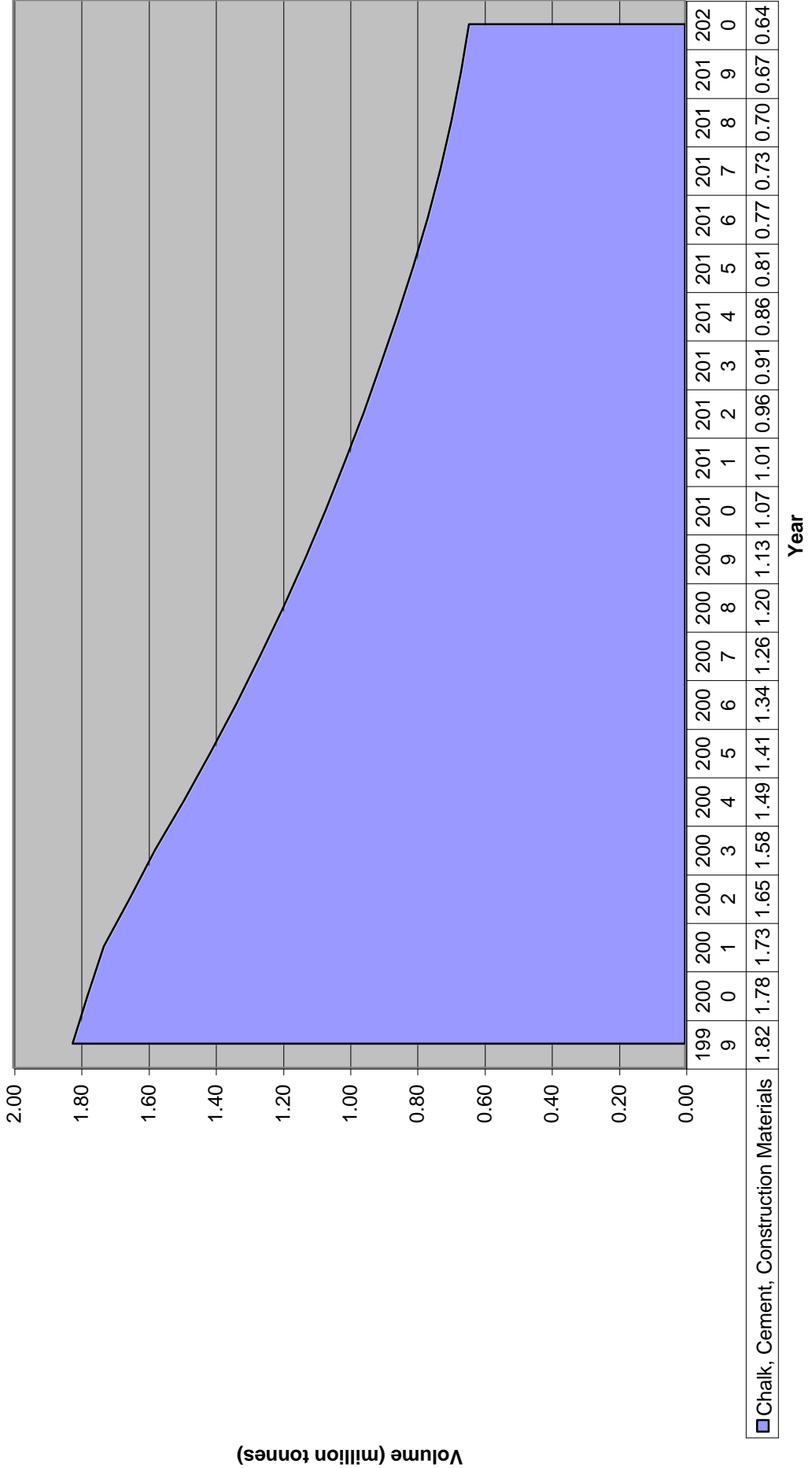
Oil and Gas Products - Case 1



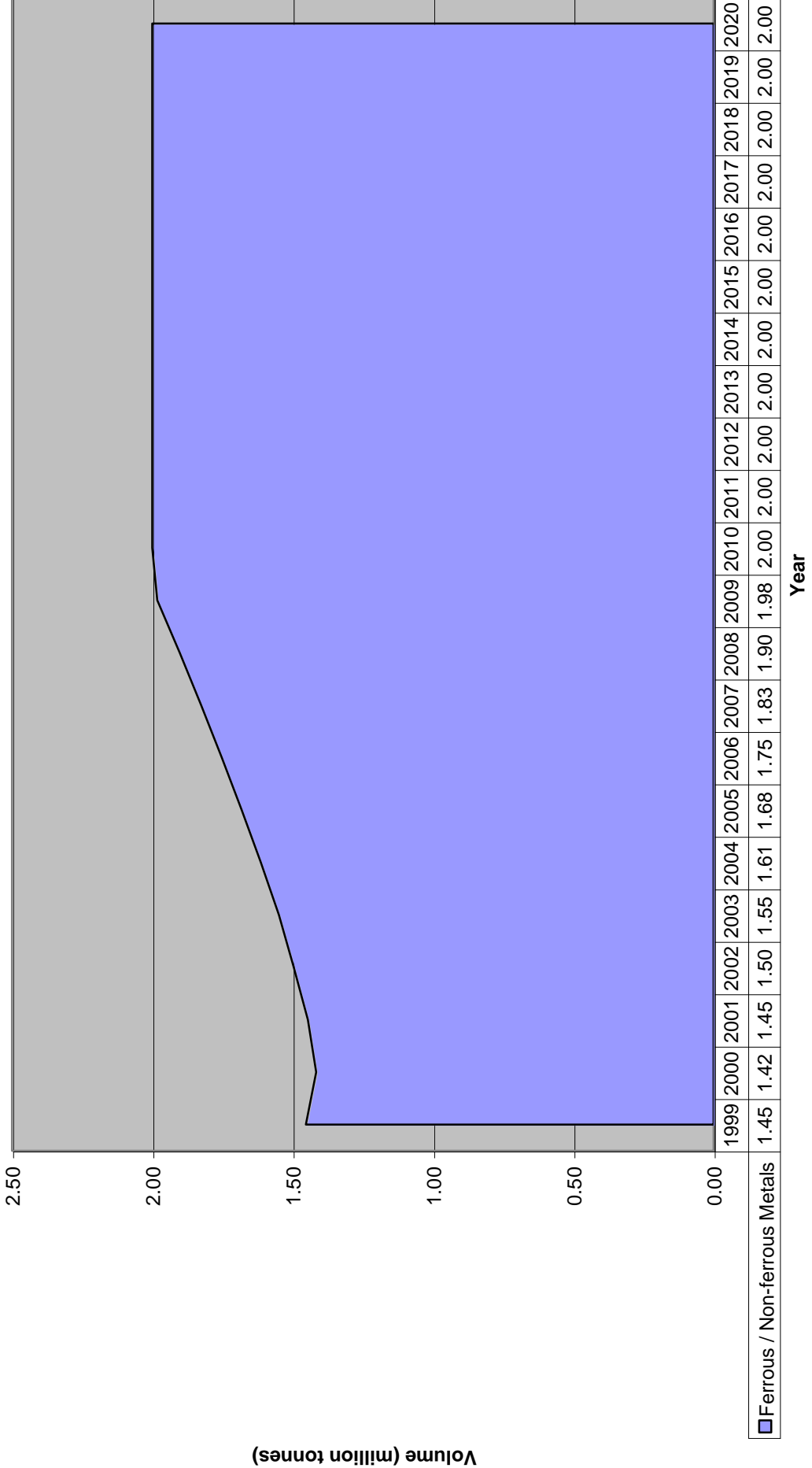
Chemical Products - Case 1



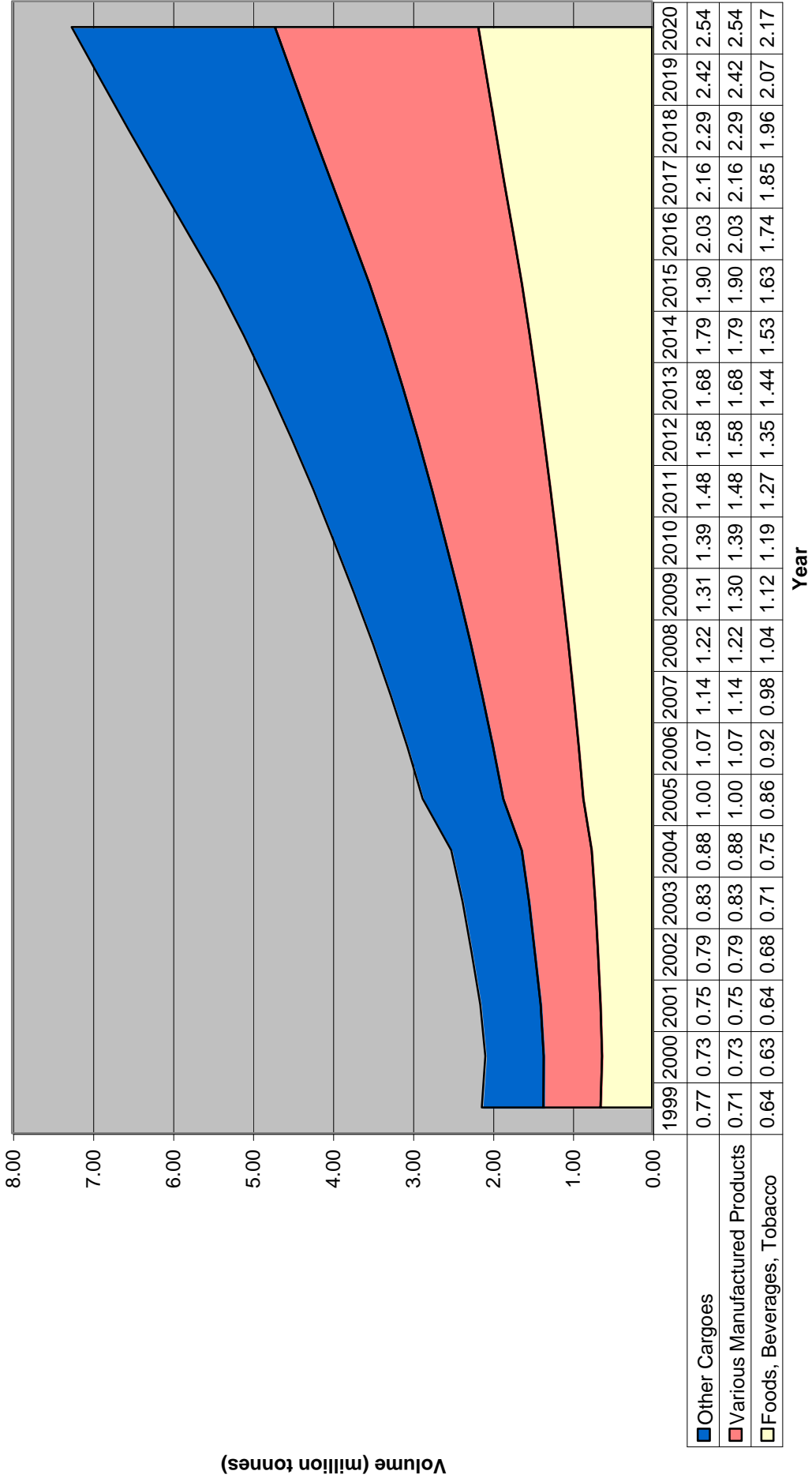
Chalk, Cement, Construction Materials - Case 1



Ferrous / Non-ferrous Metals - Case 1



Containerisable Cargoes - Case 1



CASE 2 - TOTAL TRAFFIC DEMAND FORECAST (MICRO AND MACRO ANALYSIS)

- 1. Red rows indicate commodities that are not significant for that particular trade. i.e. red row under EXPORT indicates that the commodity is also significant IMPORT, and vice versa
- 2. Yellow cells indicate that the average share of total traffic of that particular commodity, between 1999 - 2020, has INCREASED when compared to the average share of total traffic of that particular commodity, between 1994 - 1999.
- 3. Blue cells indicate that the average share of total traffic of that particular commodity, between 1999 - 2020, has DECREASED when compared to the average share of total traffic of that particular commodity, between 1994 - 1999.

TOTAL VOLUMES		1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Average Growth		Vessel Size	Road	Modal Split	Pipeline		
GDP Growth		-3.2%	2.0%	2.7%	2.7%	2.7%	2.7%	3.1%	3.1%	3.1%	3.1%	3.1%	3.1%	3.6%	3.6%	3.6%	3.6%	3.6%	4.6%	4.6%	4.6%	4.6%	4.6%	Share	Share	Min	Max	Rail	W/T	Pipeline	
		100.0%	102.0%	104.8%	107.6%	110.5%	113.5%	116.5%	120.1%	123.0%	127.7%	131.7%	136.0%	140.6%	145.7%	150.9%	156.4%	162.0%	167.9%	177.3%	185.4%	193.9%	202.9%	Share	Share						
Cereals	DB/BB	1.76	1.83	1.86	1.97	2.03	2.10	2.17	2.20	2.27	2.43	2.43	2.50	2.50	2.50	2.50	2.50	2.50	2.50	2.50	2.50	2.50	2.50	4.1%	1.6%	3,000	30,000	20%	70%	10%	NA
Foods, Beverages, Tobacco	BB/CT	0.64	0.63	0.64	0.65	0.66	0.70	0.81	0.84	0.86	0.82	0.96	1.00	1.04	1.09	1.14	1.19	1.26	1.34	1.42	1.50	1.59	1.67	2.0%	7.4%	10,000	50,000	60%	40%	0%	NA
Timber, Charcoal	BB	0.64	0.70	0.77	0.85	0.93	1.03	1.13	1.13	1.13	1.13	1.13	1.07	1.02	0.97	0.92	0.87	0.83	0.79	0.75	0.71	0.68	0.68	15.3%	2.6%	3,000	25,000	20%	75%	5%	NA
Natural / Chemical Fertilisers	DB/BB	1.08	1.06	1.04	1.03	1.03	1.02	1.01	1.01	1.01	1.01	1.01	1.01	1.01	1.01	1.02	1.03	1.04	1.06	1.07	1.08	1.10	1.12	5.9%	0.8%	5,000	35,000	25%	75%	0%	NA
Iron Ore, Scrap	DB/BB	4.87	5.61	5.91	6.24	6.58	6.94	7.33	7.59	7.88	8.19	8.52	8.89	9.30	9.82	10.46	11.24	12.16	13.24	14.50	15.95	17.60	19.45	18.1%	21.2%	3,000	165,000	0%	25%	75%	NA
Non-Ferrous Ore	DB	1.20	1.29	1.35	1.41	1.48	1.56	1.62	1.62	1.62	1.62	1.62	1.64	1.68	1.73	1.78	1.82	1.88	1.94	2.00	2.07	2.14	2.21	9.3%	1.5%	10,000	50,000	60%	40%	0%	NA
Solid Fuel (Coal, Coke, etc.)	DB	1.84	1.78	1.79	1.83	1.87	1.90	1.94	1.99	2.03	2.08	2.13	2.10	2.10	2.10	2.10	2.10	2.10	2.10	2.10	2.10	2.10	2.10	15.1%	11.1%	65,000	120,000	0%	50%	50%	NA
Crude Oil	LB	3.21	3.44	3.56	3.68	3.81	3.93	4.06	4.19	4.32	4.45	4.58	4.71	4.84	4.97	5.10	5.23	5.36	5.49	5.62	5.75	5.88	6.01	23.4%	26.6%	6,000	120,000	0%	0%	100%	0%
Oil and Gas Products	LB	2.21	2.41	2.53	2.65	2.77	2.89	3.01	3.13	3.25	3.37	3.49	3.61	3.73	3.85	3.97	4.09	4.21	4.33	4.45	4.57	4.69	4.81	12.9%	2.6%	25,000	45,000	0%	20%	5%	75%
Chemical Products	LB/BB	0.75	0.72	0.73	0.75	0.77	0.80	0.82	0.79	0.77	0.74	0.72	0.70	0.68	0.66	0.64	0.62	0.60	0.58	0.56	0.54	0.53	0.51	2.8%	1.8%	5,000	35,000	20%	80%	0%	NA
Chalk, Cement, Construction Materials	DB/BB	1.82	1.78	1.73	1.68	1.65	1.61	1.57	1.53	1.49	1.44	1.40	1.36	1.32	1.28	1.24	1.20	1.16	1.11	1.06	1.02	0.98	0.94	6.1%	3.7%	3,000	35,000	0%	30%	70%	NA
Ferrous / Non-Ferrous Metals	BB	1.45	1.48	1.54	1.59	1.61	1.61	1.71	1.78	1.85	1.93	2.01	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	4.1%	1.5%	10,000	50,000	60%	40%	0%	NA
Various Manufactured Products	BB/CT	0.71	0.73	0.75	0.77	0.79	0.81	0.80	0.84	0.88	0.92	0.97	1.02	1.07	1.12	1.17	1.22	1.28	1.33	1.39	1.45	1.51	1.57	3.2%	4.6%	10,000	50,000	60%	40%	0%	NA
Other Charges	BB/CT	0.77	0.75	0.77	0.79	0.81	0.80	0.84	0.88	0.92	0.97	1.02	1.07	1.12	1.17	1.22	1.28	1.33	1.39	1.45	1.51	1.57	1.63	2.7%	3.2%	10,000	50,000	60%	40%	0%	NA
TOTAL		22.96	23.25	23.97	24.52	25.21	25.95	26.74	27.58	28.47	29.41	30.40	31.44	32.53	33.67	34.86	36.10	37.39	38.78	40.27	41.86	43.54	45.31	100.0%	100.0%	2.67%					
Containerisable Cargo		2.13	2.08	2.14	2.20	2.26	2.32	2.39	2.49	2.61	2.73	2.85	2.97	3.10	3.23	3.36	3.49	3.62	3.75	3.88	4.01	4.14	4.27								
Containerisation Rate		46%	49%	52%	56%	59%	63%	66%	70%	73%	77%	80%	81%	82%	83%	84%	85%	86%	87%	88%	89%	90%	90%								
Containerised Cargo		0.94	1.05	1.14	1.26	1.37	1.43	1.48	1.57	1.64	1.71	1.78	1.84	1.91	1.97	2.03	2.09	2.15	2.21	2.27	2.33	2.39	2.45								

Macro Basis Forecast

24.17 28.19 33.67 41.86

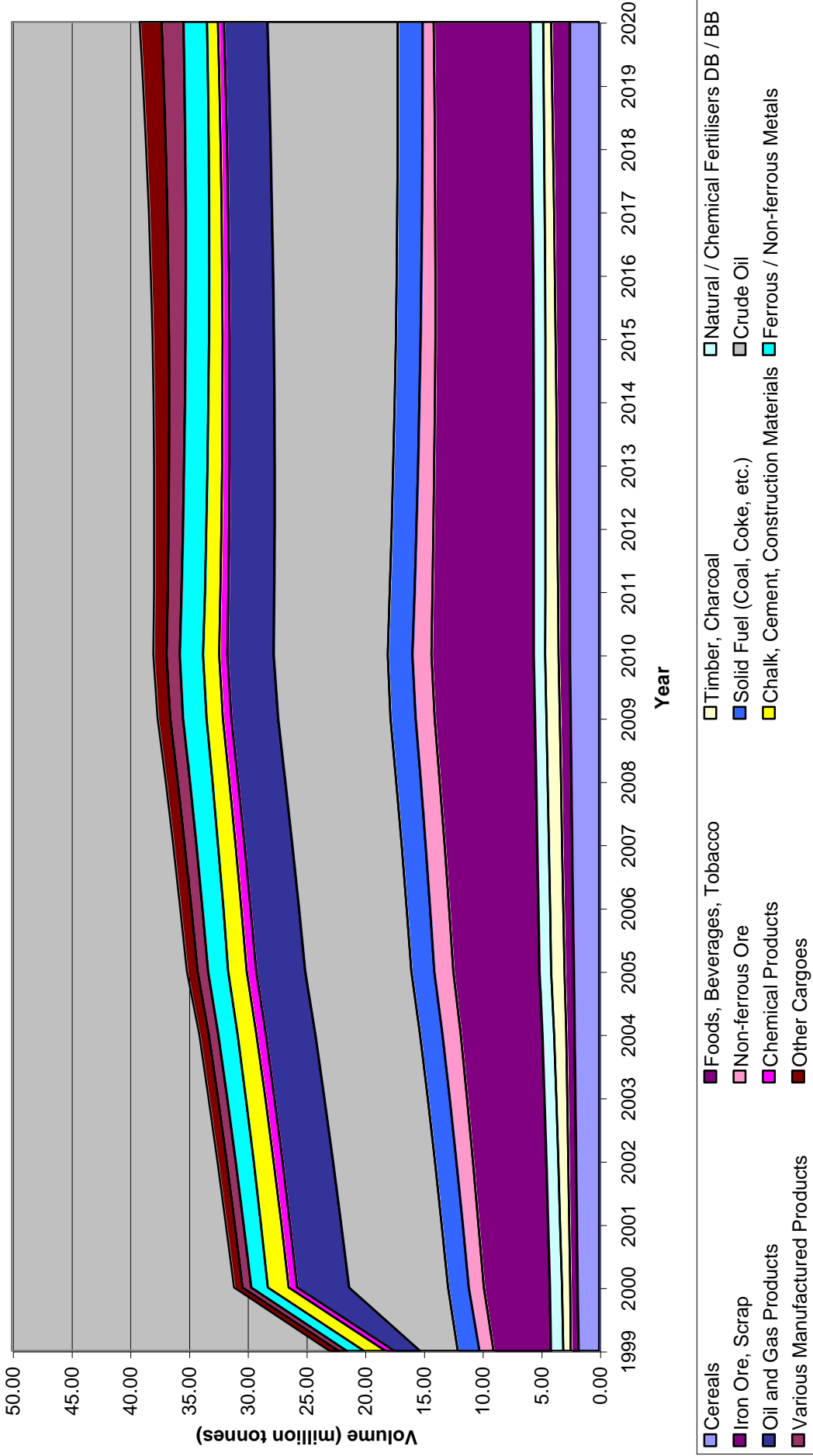
TRADE EXPORT		1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Average Growth		Vessel Size	Road	Modal Split	Pipeline		
GDP Growth		-3.2%	2.0%	2.7%	2.7%	2.7%	2.7%	3.1%	3.1%	3.1%	3.1%	3.1%	3.1%	3.6%	3.6%	3.6%	3.6%	3.6%	4.6%	4.6%	4.6%	4.6%	4.6%	Share	Share	Min	Max	Rail	W/T	Pipeline	
		100.0%	102.0%	104.8%	107.6%	110.5%	113.5%	116.5%	120.1%	123.0%	127.7%	131.7%	136.0%	140.6%	145.7%	150.9%	156.4%	162.0%	167.9%	177.3%	185.4%	193.9%	202.9%	Share	Share						
Cereals	DB/BB	1.01	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	15.0%	12.7%	1,500	15,000	20%	70%	10%	NA	
Foods, Beverages, Tobacco	BB/CT	0.14	0.14	0.15	0.15	0.16	0.16	0.17	0.17	0.18	0.19	0.19	0.20	0.21	0.22	0.23	0.24	0.25	0.26	0.27	0.29	0.29	0.29	4.1%	1.7%	10,000	50,000	60%	40%	0%	NA
Timber, Charcoal	BB	0.64	0.70	0.77	0.85	0.93	1.03	1.13	1.13	1.13	1.13	1.13	1.07	1.02	0.97	0.92	0.87	0.83	0.79	0.75	0.71	0.68	15.3%	2.6%	3,000	25,000	20%	75%	5%	NA	
Natural / Chemical Fertilisers	DB/BB	0.68	0.67	0.65	0.63	0.61	0.59	0.57	0.55	0.54	0.52	0.50	0.48	0.46	0.45	0.43	0.41	0.39	0.37	0.36	0.34	0.32	0.30	12.5%	4.1%	5,000	35,000	25%	75%	0%	NA
Iron Ore, Scrap	DB/BB	0.62	0.68	0.75	0.82	0.90	1.00	1.10	1.04	0.99	0.94	0.89	0.85	0.78	0.69	0.62	0.55	0.48	0.41	0.36	0.33	0.30	0.28	1.8%	8.0%	3,000	15,000	0%	25%	75%	NA
Non-Ferrous Ore	DB	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%	0.0%	0	0	0	0	0	0	
Solid Fuel (Coal, Coke, etc.)	DB	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%	0.0%	0	0	0	0	0	0	
Crude Oil	LB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%	0.0%	0	0	0	0	0	0	
Oil and Gas Products	LB	1.38	1.56	1.68	1.81	1.93	2.06	2.19	2.31	2.44	2.56	2.69	2.82	2.93	3.06	3.19	3.32	3.45	3.58	3.71	3.84	3.97	4.10	24.3%	23.7%	1,500	15,000	0%	20%	5%	75%
Chemical Products	LB/BB	0.72	0.73	0.75	0.77	0.80	0.82	0.85	0.87	0.89	0.91	0.93	0.95	0.97	0.99	1.01	1.03	1.05	1.07	1.09	1.11	1.13	1.15	6.1%	3.7%	3,000	35,000	0%	30%	70%	NA
Chalk, Cement, Construction Materials	DB/BB	1.81	1.78	1.73	1.68	1.65	1.61	1.57	1.53	1.49	1.44	1.40	1.36	1.32	1.28	1.24	1.20	1.16	1.11	1.06	1.02	0.98	0.94	16.3%	11.1%	65,000	120,000	0%	50%	50%	NA
Ferrous / Non-Ferrous Metals	BB	1.33	1.37	1.42	1.47	1.52	1.58	1.64	1.70	1.78	1.85	1.93	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	14.5%	15.0%	10,000	20,000	60%	40%	0%	NA
Various Manufactured Products	BB/CT	0.32	0.33	0.34	0.35	0.36	0.37	0.38	0.39	0.40	0.41	0.42	0.43	0.44	0.45	0.46	0.47	0.48	0.49	0.50	0.51	0.52	0.53	4.3%	3.4%	10,000	50,000	60%	40%	0%	NA
Other Charges	BB/CT	0.62	0.63	0.65	0.67	0.69	0.71	0.73	0.75	0.77	0.79	0.82	0.84	0.87	0.91	0.94	0.97	1.01	1.05	1.10	1.15	1.21	1.26	4.3%	7.5%	3,400	10,000	60%	40%	0%	NA
TOTAL		9.47	12.21	12.21	12.32	12.47	12.63	12.82	12.71	12.81	12.87	12.93	12.98	13.03	13.08	13.13	13.18	13.23	13.28	13.33	13.38	13.43	13.48	100.0%	100.0%	0.48%					
Containerisable Cargo		1.12	1.14	1.18	1.21	1.24	1.27	1.31	1.35	1.39	1.43	1.48	1.52	1.58	1.63	1.69	1.75	1.82	1.90	1.99	2.08	2.18	2.28								
Containerisation Rate		46%	49%	52%	56%	59%	63%	66%	70%	73%	77%	80%	81%	82%	83%	84%	85%	86%	87%	88%	89%	90%									
Containerised Cargo		0.52	0.58	0.63	0.69	0.75	0.82	0.89	0.97	1.05	1.14	1.22	1.28	1.34	1.41	1.47	1.55	1.64	1.73	1.83	1.94	2.05									

Macro Basis Forecast

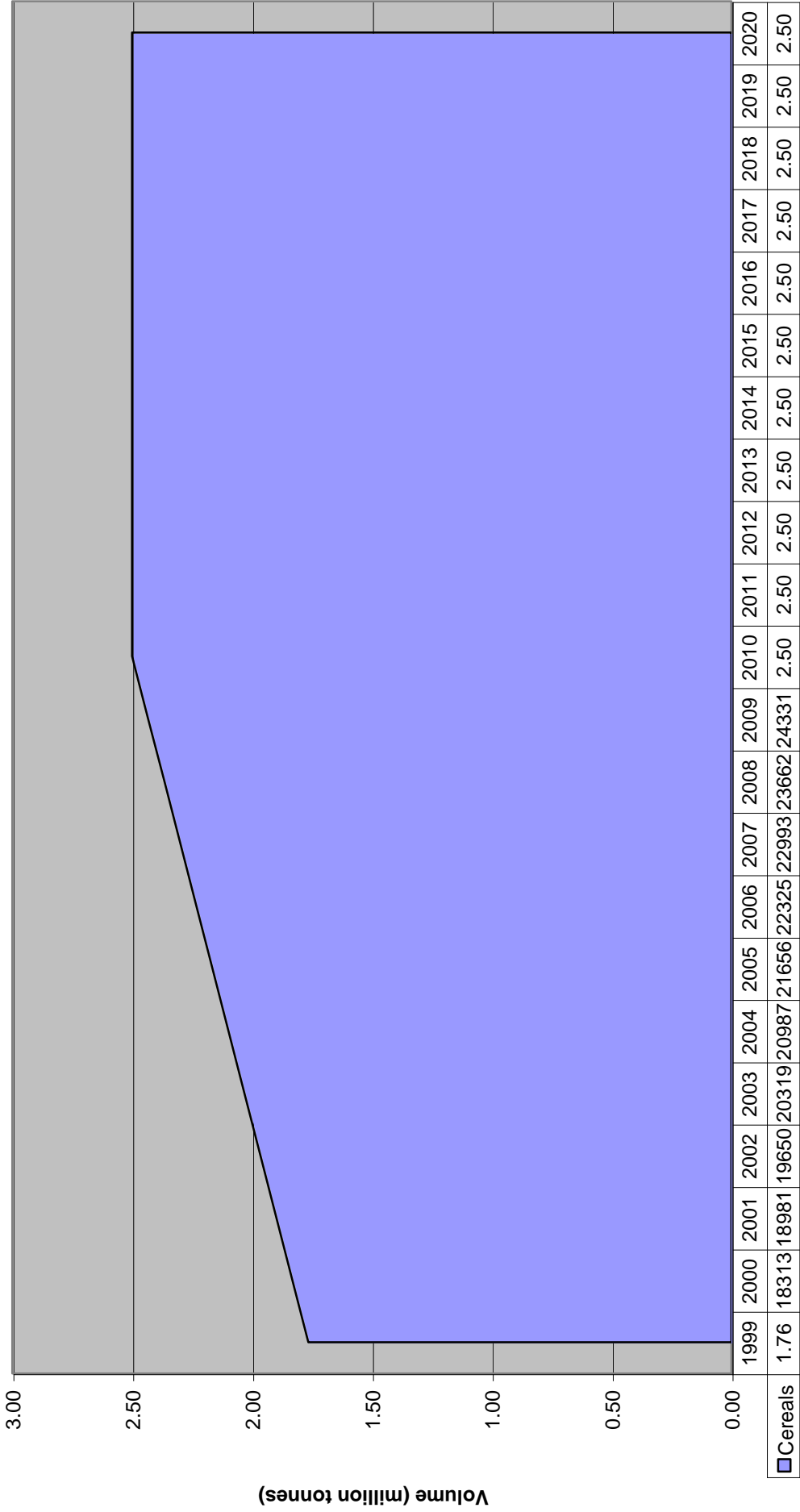
12.93 16.23 22.93 28.23

TRADE IMPORT		1999	2000	2001	2002	2003	2004
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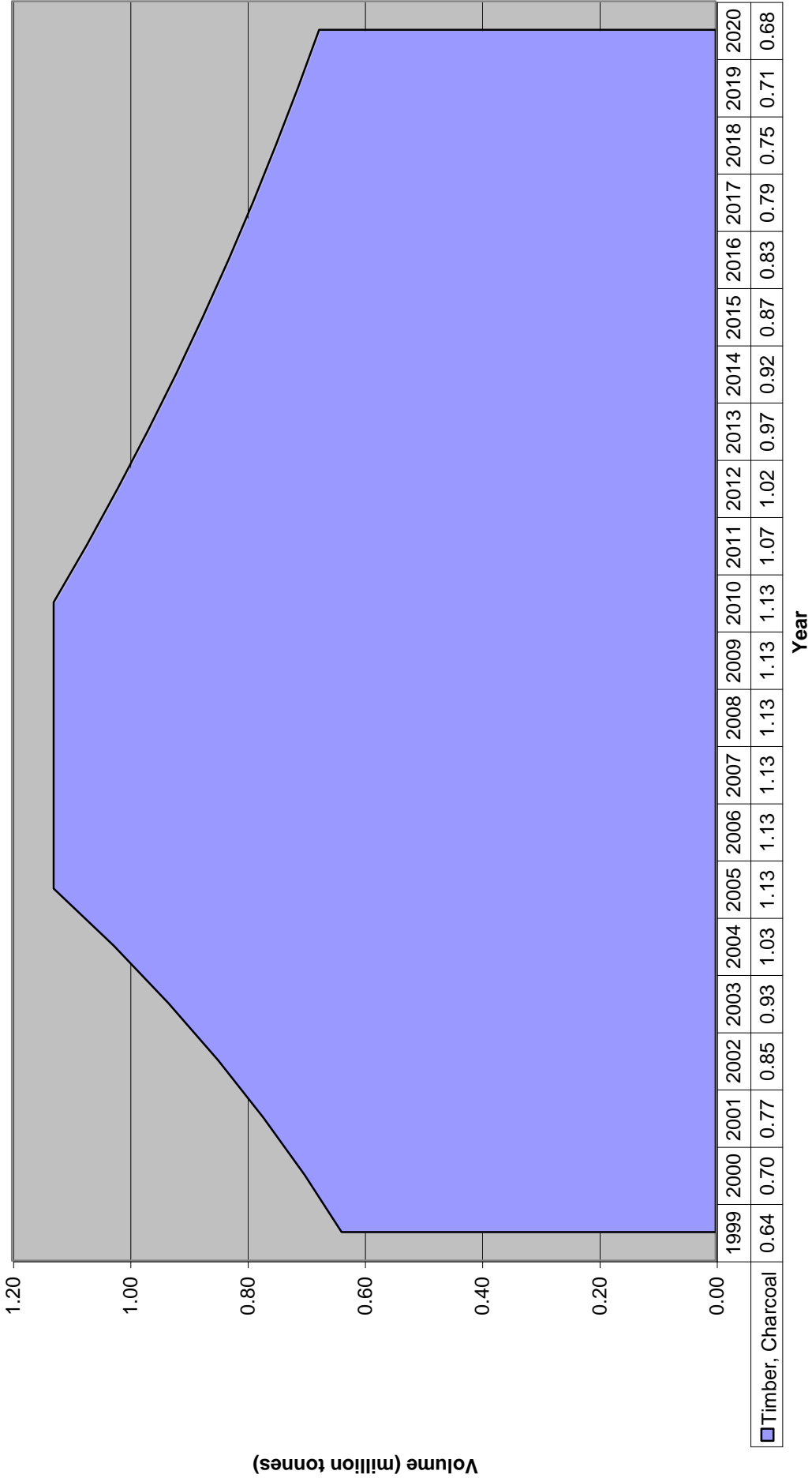
Forecast Volume at Constantza 1999 - 2020 (Case 2)



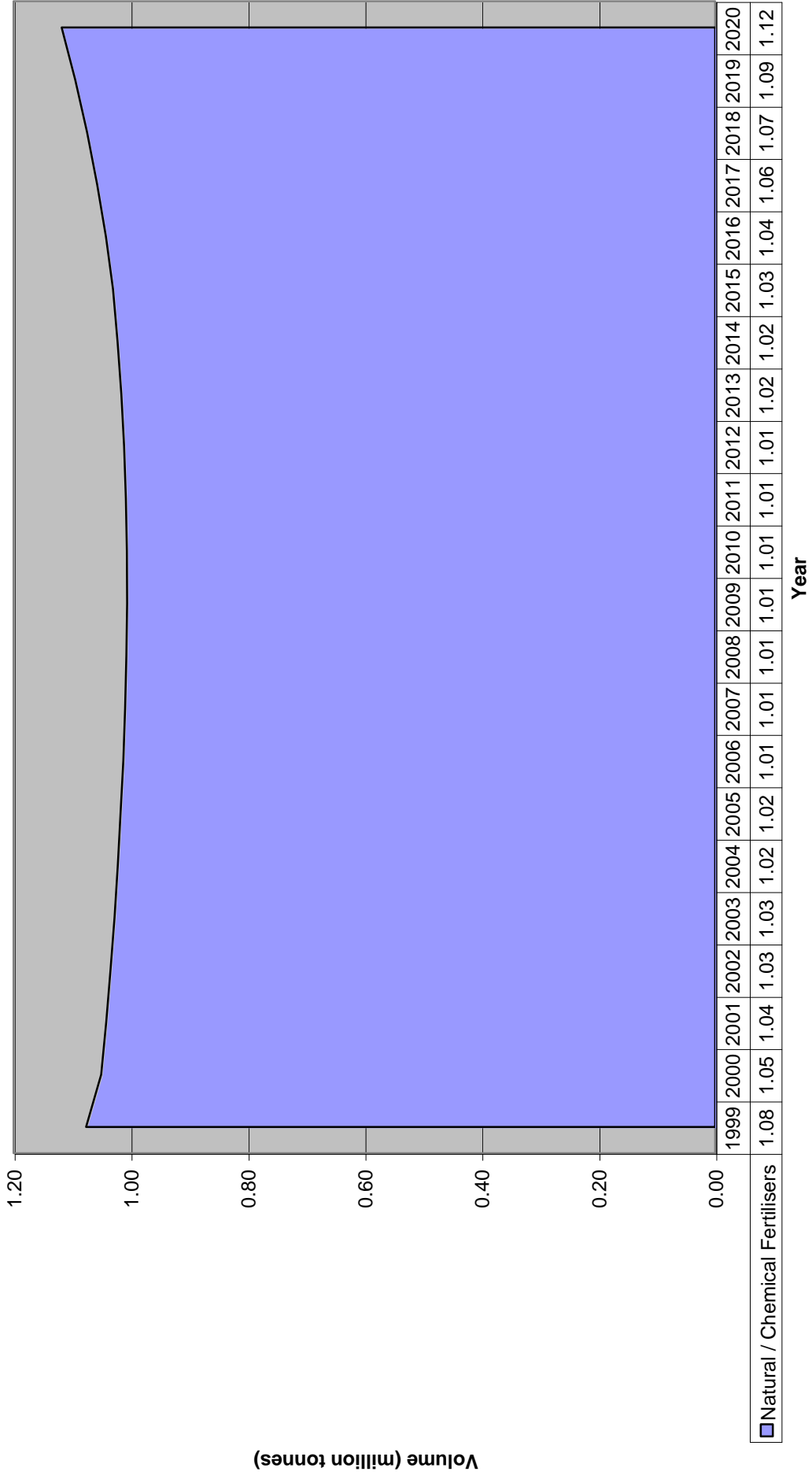
Cereals - Case 2



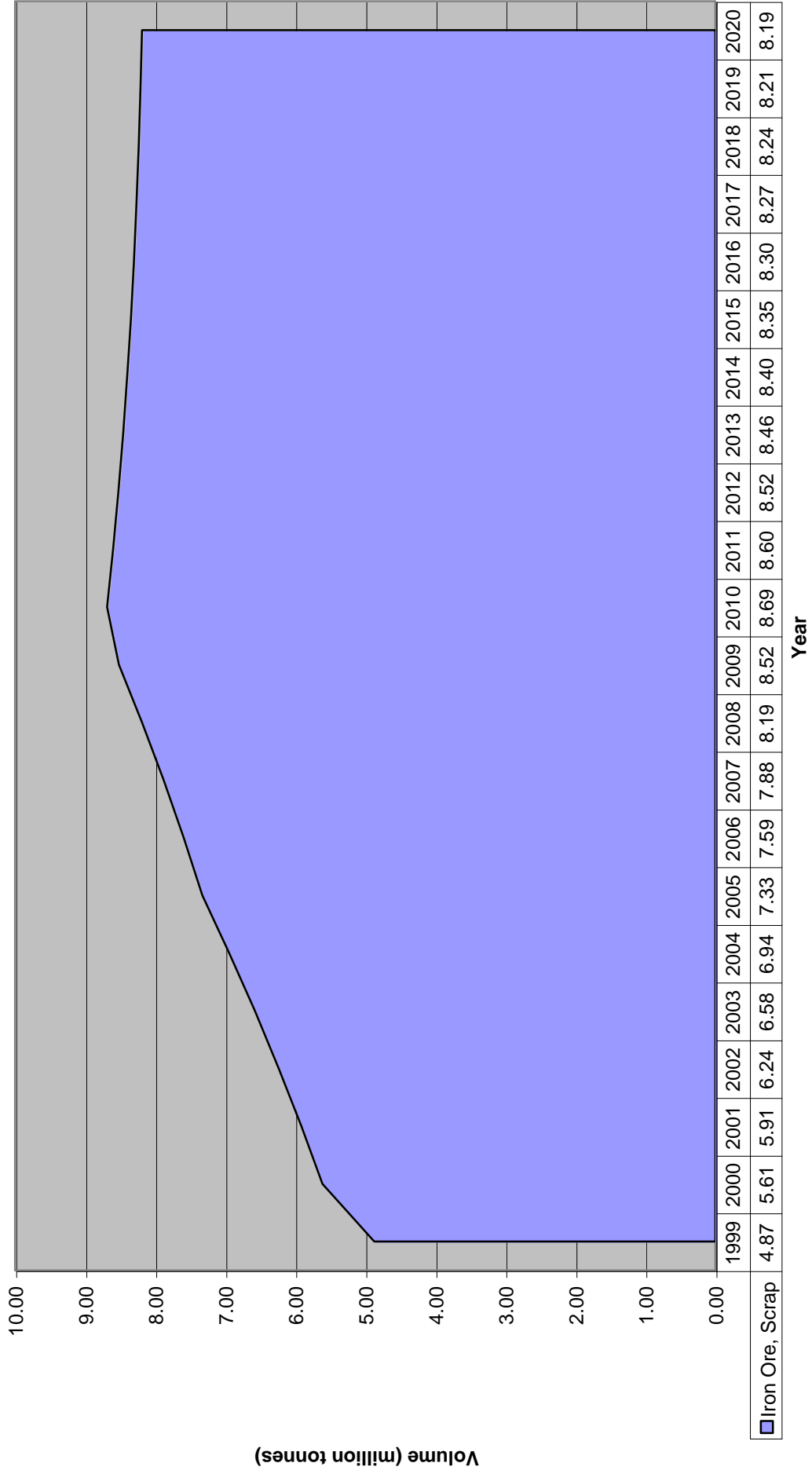
Timber, Charcoal - Case 2



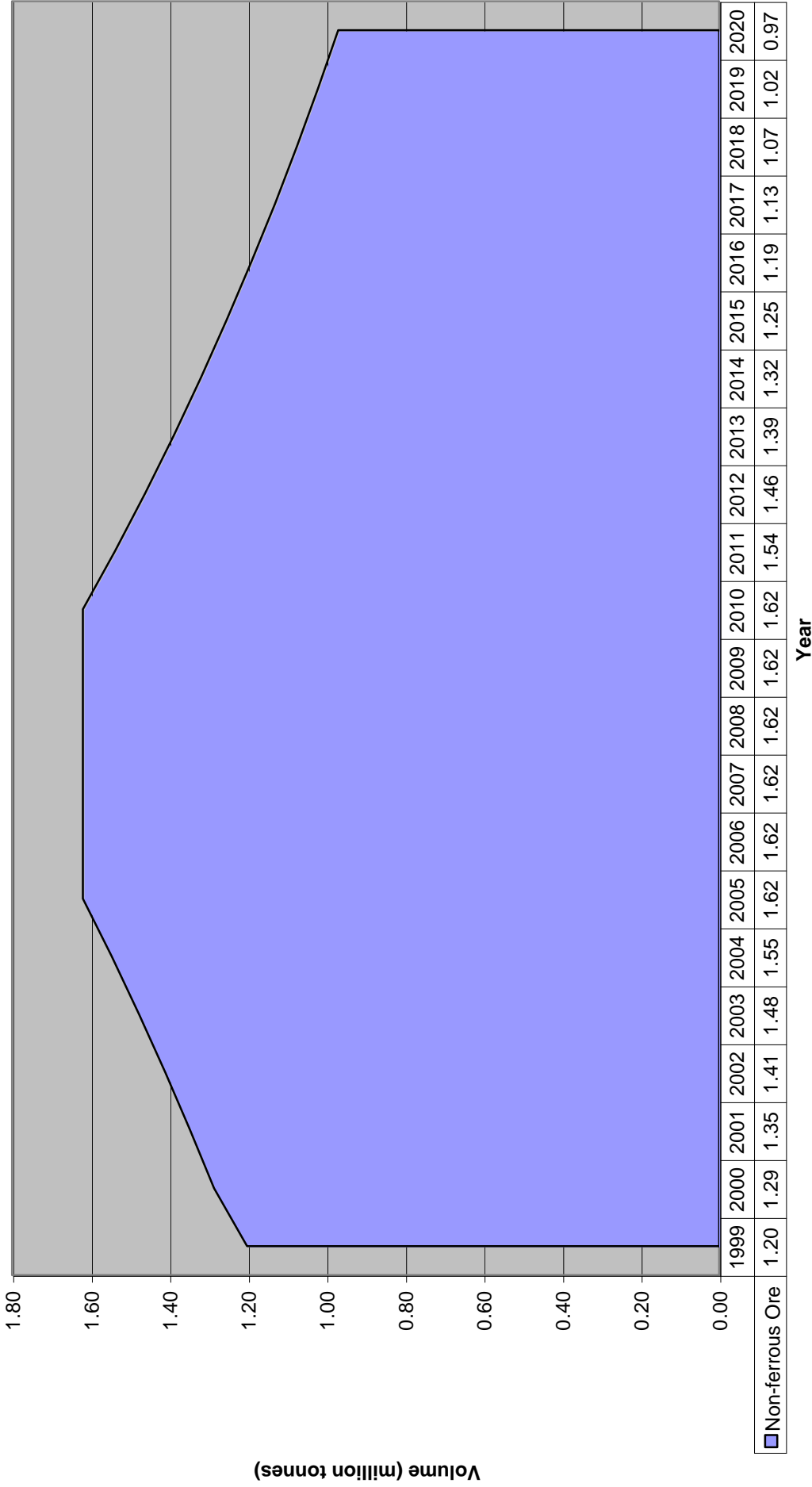
Natural / Chemical Fertilisers - Case 2



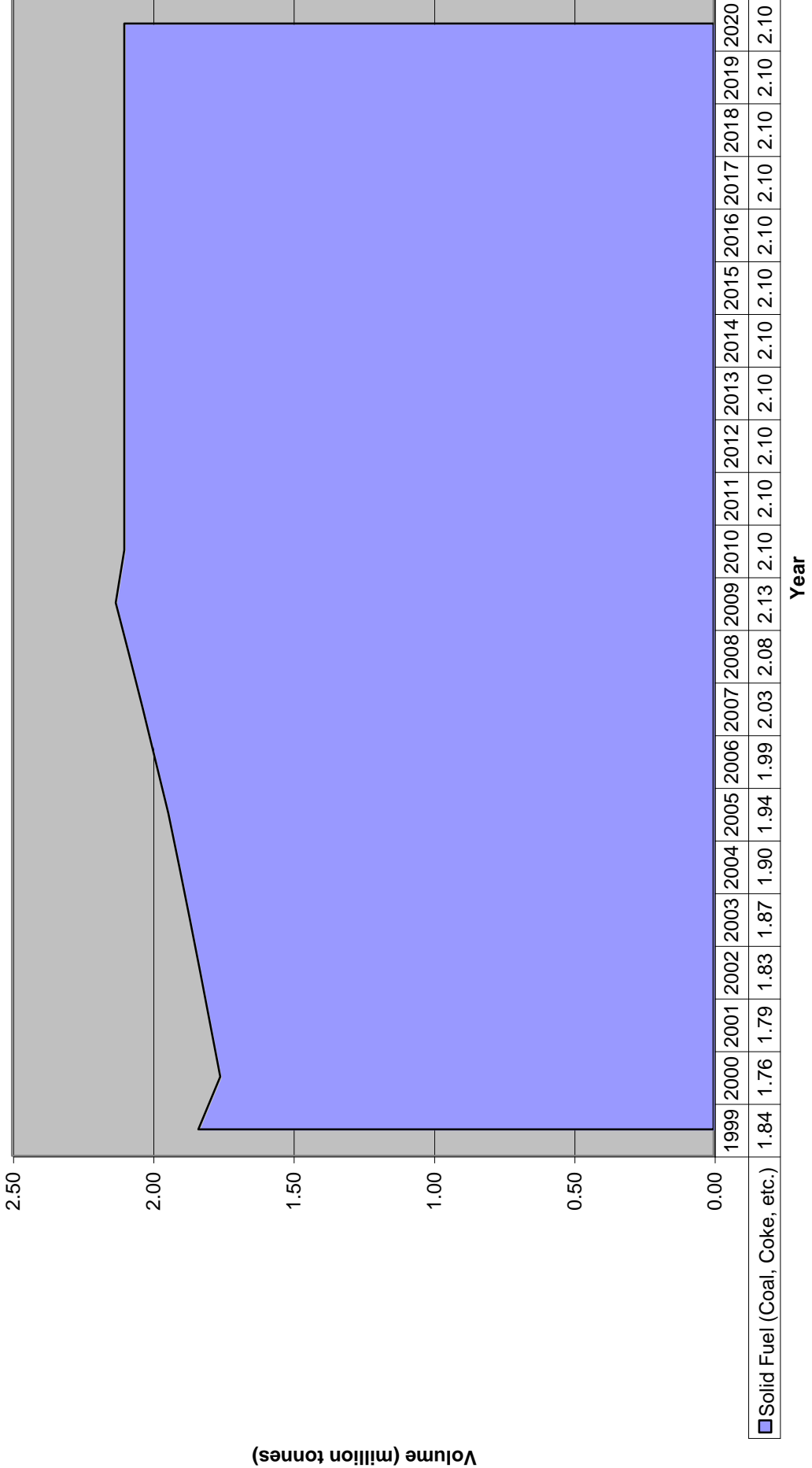
Iron Ore, Scrap - Case 2



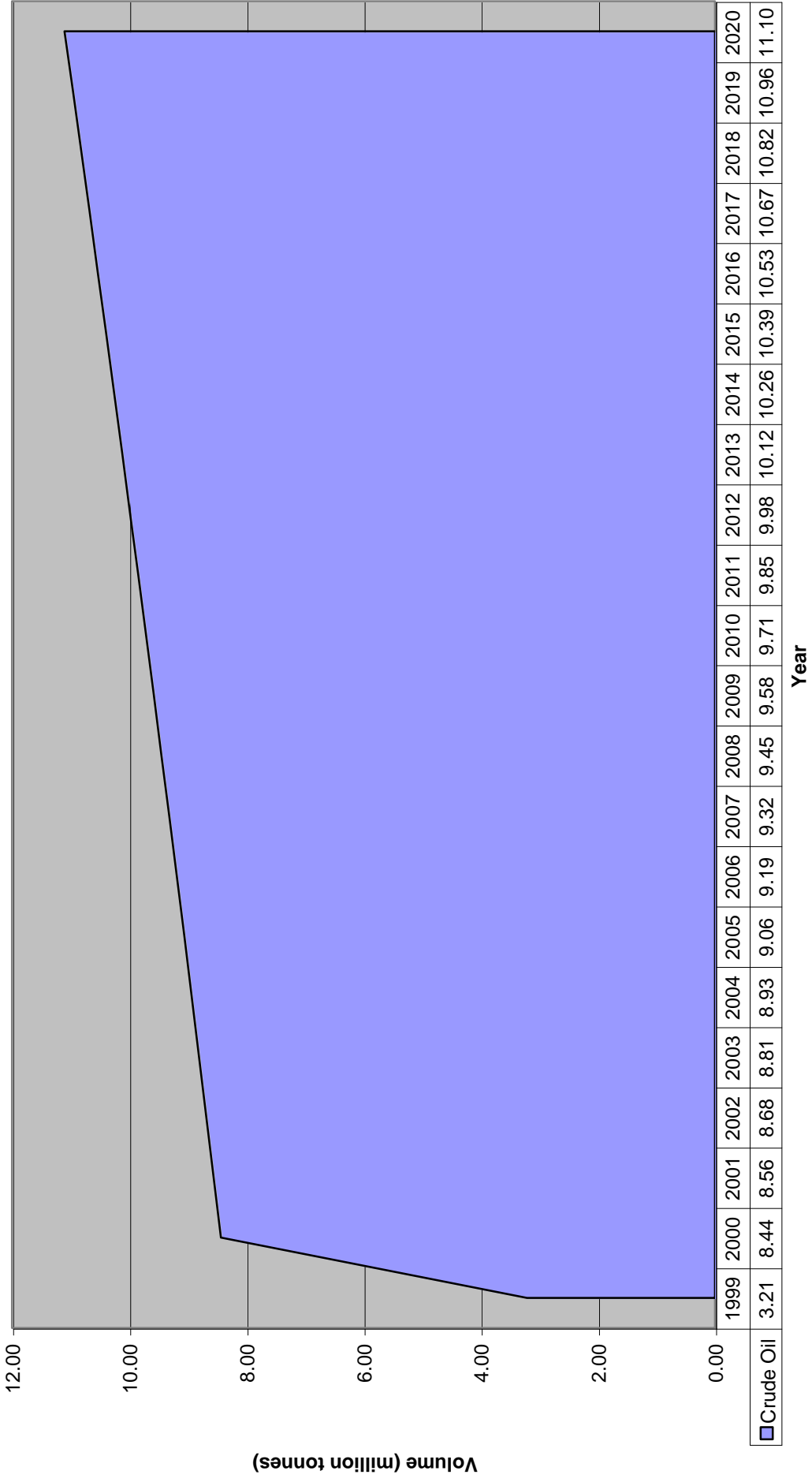
Non-ferrous Ore - Case 2



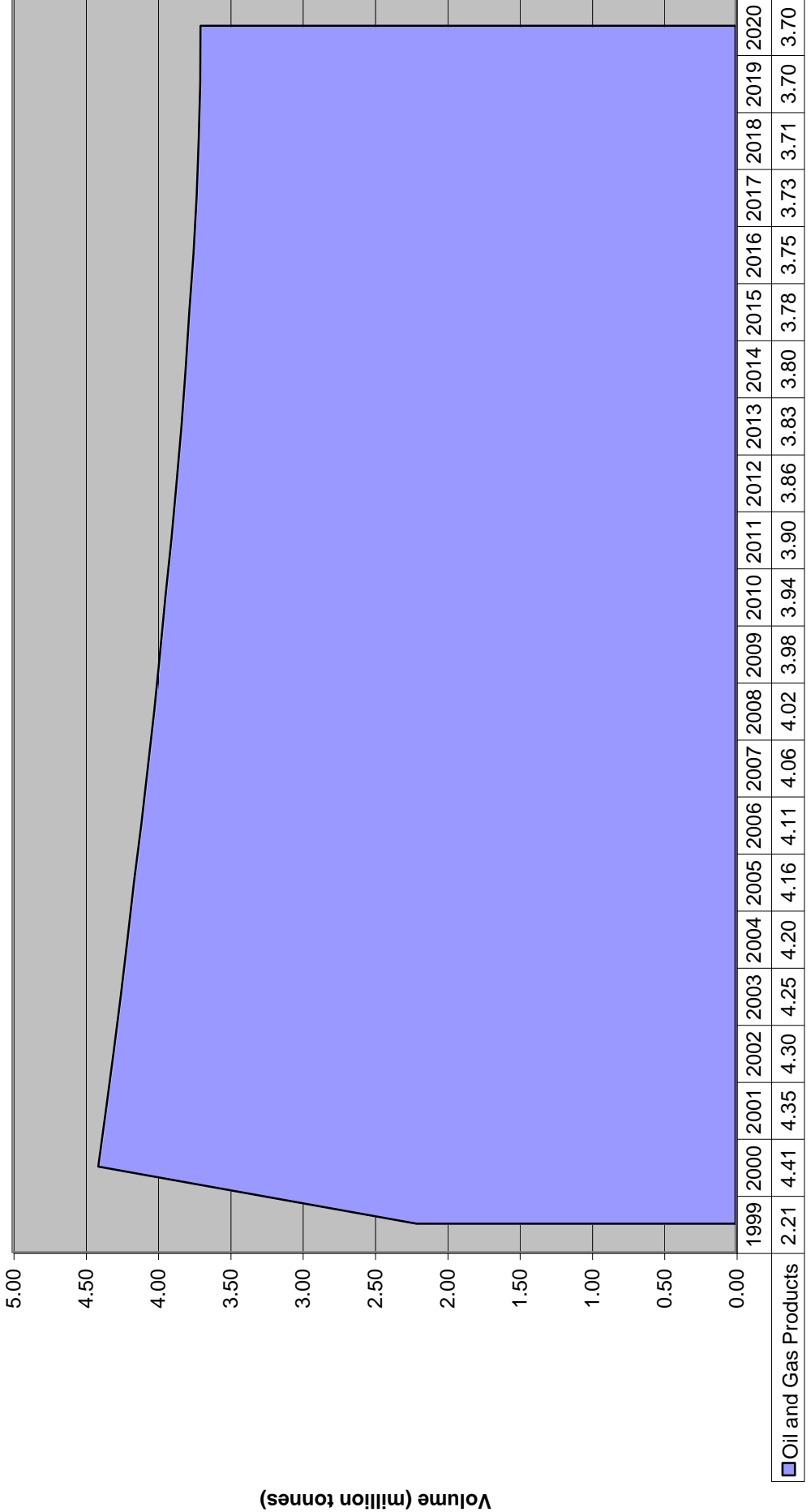
Solid Fuel (Coal, Coke, etc.) - Case 2



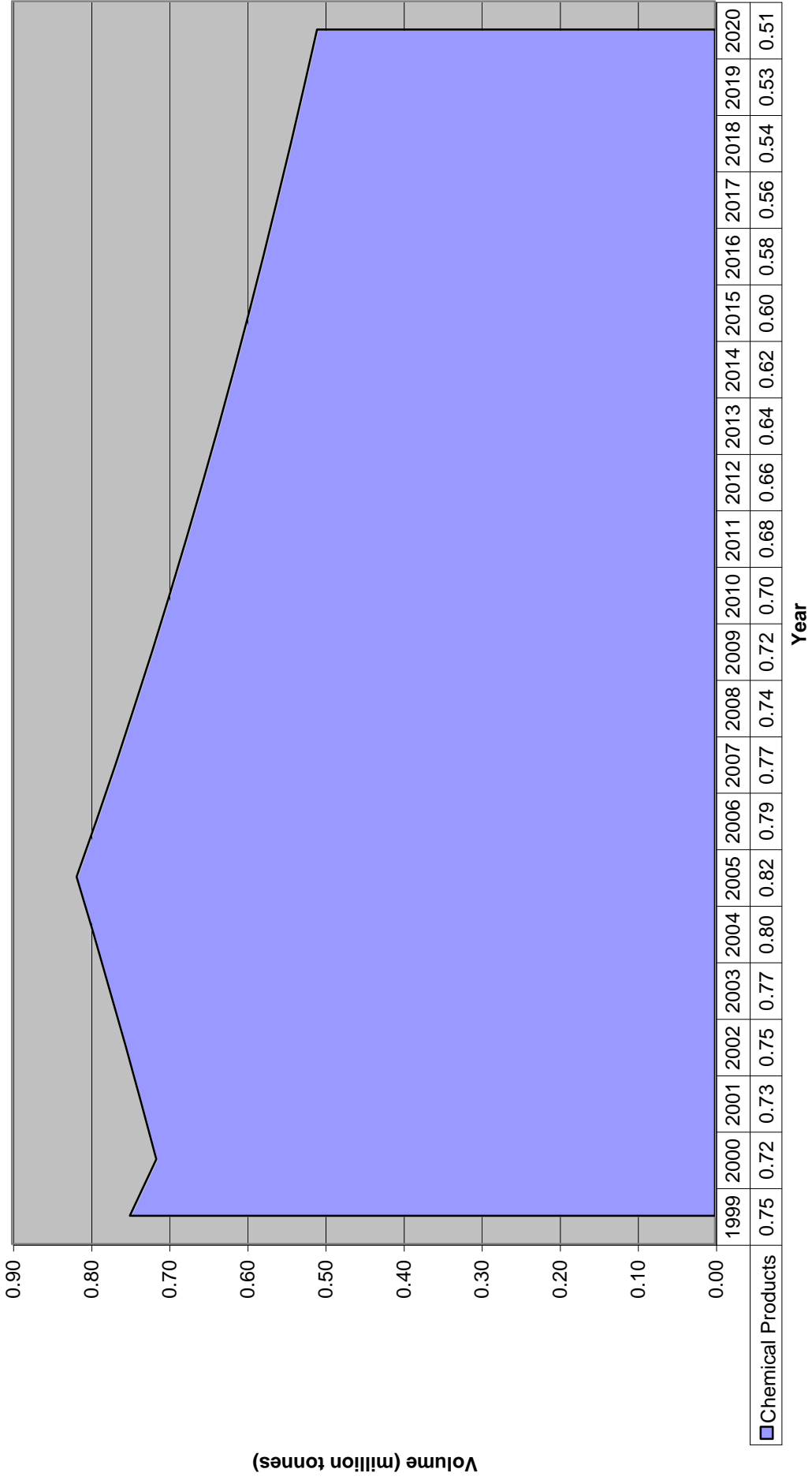
Crude Oil - Case 2



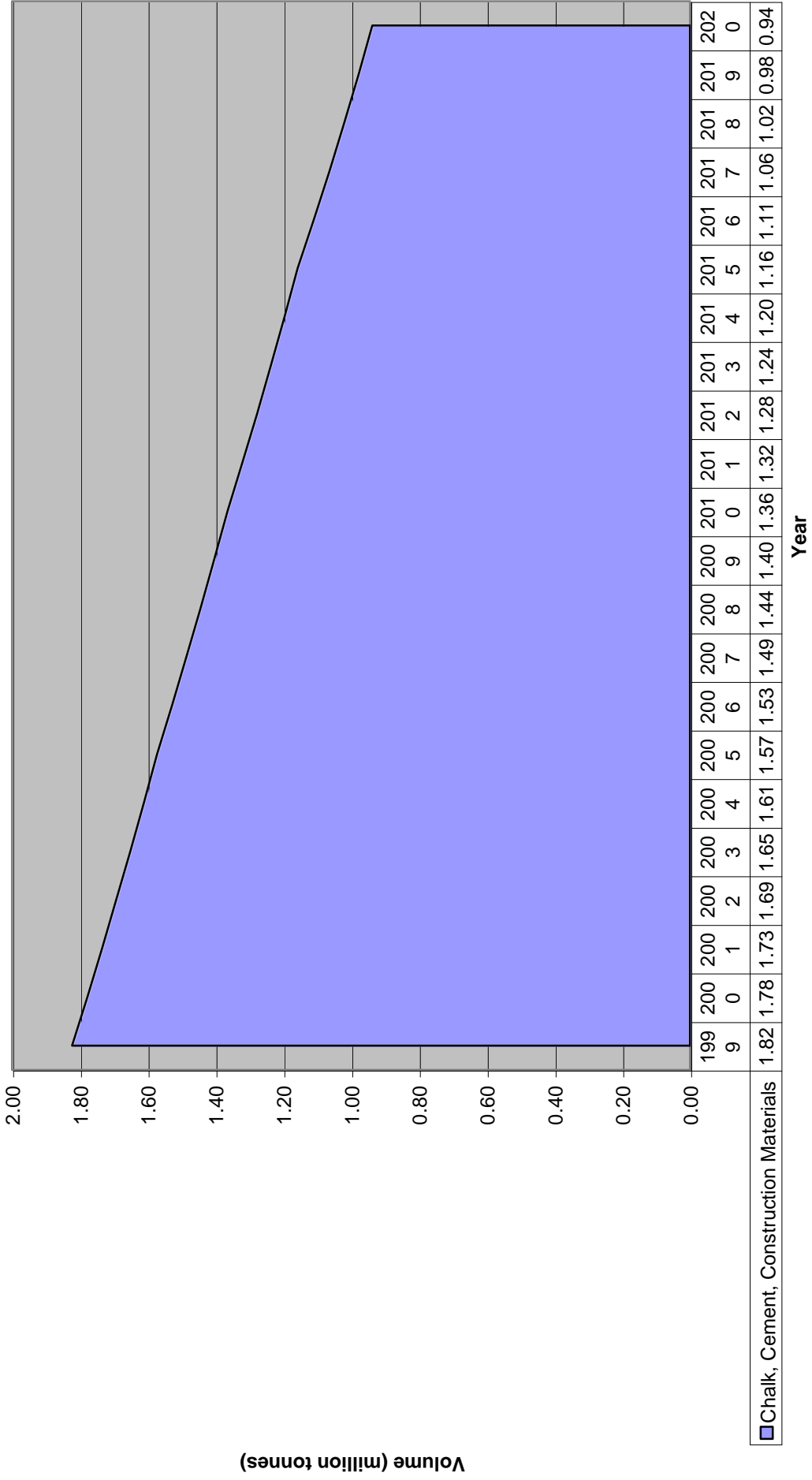
Oil and Gas Products - Case 2



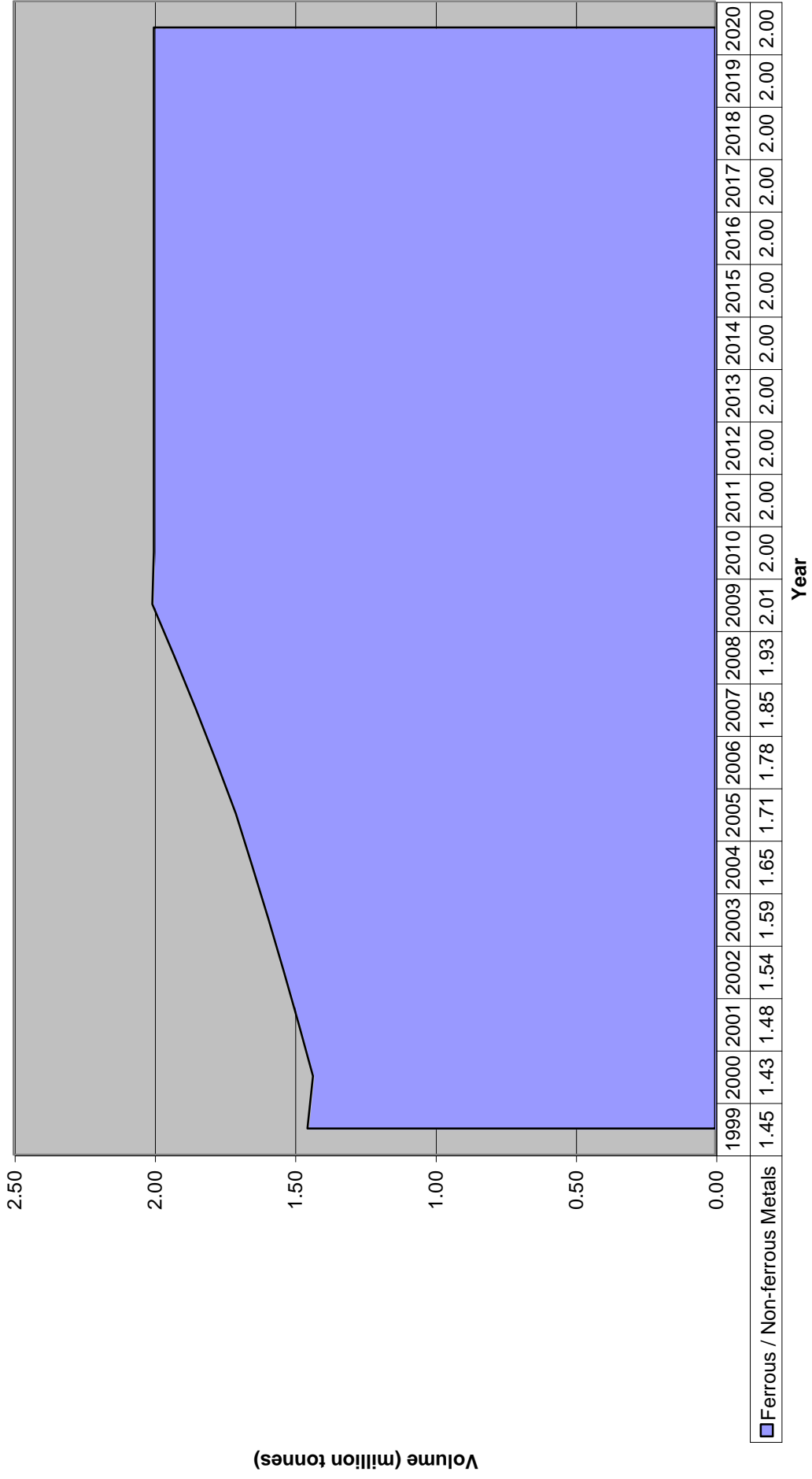
Chemical Products - Case 2



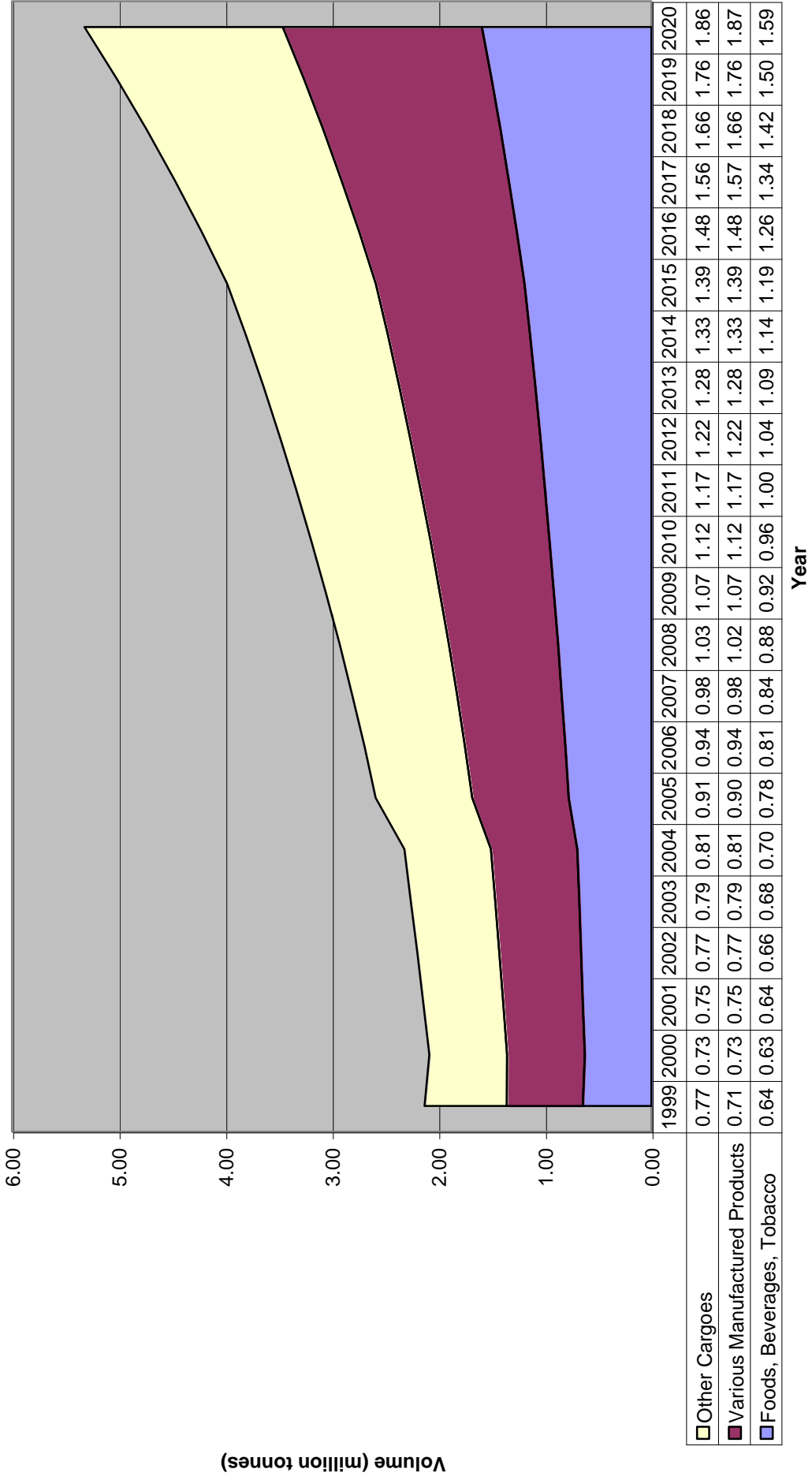
Chalk, Cement, Construction Materials - Case 2



Ferrous / Non-ferrous Metals - Case 2



Containerisable Cargoes - Case 2



APPENDIX IIB

**PASSENGER TRAFFIC DEMAND FORECAST: DATA TO SECTION
3.11, CHAPTER 3, PART 2**

**(Forecast Criteria, Summary of International Tourists
and Domestic Tourists)**

APPENDIX 3.11 Passenger Traffic Demand Forecast

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of Departures from Romanian Abroad

Table 3.11.1 International Tourists (Arrivals at Romania of Foreign Visitors) by Mode

(Unit: 1,000 Passengers)

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Road	3,670	3,729	4,826	4,309	4,557	4,266	4,073	3,850	3,529	3,930	3,808
Railway	2,349	1,178	1,128	1,005	902	570	492	596	589	586	660
Air	271	276	308	326	289	433	479	533	553	567	655
Ship	242	176	139	146	150	176	161	170	160	141	141
Total	6,532	5,359	6,401	5,786	5,898	5,445	5,205	5,149	4,831	5,224	5,264
Annual Growth Rate(%)		-18.0	19.4	-9.6	1.9	-7.7	-4.4	-1.1	-6.2	8.1	0.8

Source : Romanian Statistical Yearbook, 1990-1999, National Institute of Statistics

Table 3.11.2 Share International Tourists (Arrivals in Romania of Foreign Visitors) by Mode

(Unit: %)

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Road	56.2	69.6	75.4	74.5	77.3	78.3	78.3	74.8	73.0	75.2	72.3
Railway	36.0	22.0	17.6	17.4	15.3	10.5	9.5	11.6	12.2	11.2	12.5
Air	4.1	5.2	4.8	5.6	4.9	8.0	9.2	10.4	11.4	10.9	12.4
Ship	3.7	3.3	2.2	2.5	2.5	3.2	3.1	3.3	3.3	2.7	2.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 3.11.3 Annual Growth Rate of GDP in Real Prices of European Countries

(Unit: %)

	1990	1997	1998	1999
EC Countries				
Austria	4.6	1.2	2.9	2.2
Belgium	2.7	3.5	2.7	2.6
France	2.5	1.9	3.2	2.9
Germany	5.7	1.5	2.2	1.5
Greece	-0.6	3.4	3.7	3.4
Italy	2.0	1.5	1.3	2.2
Netherlands	4.0	3.6	3.7	7.9
United Kingdom	0.6	3.5	2.2	2.1
Spain	3.7	3.5	3.8	3.7
Bulgaria		-7.0	3.5	2.4
Switzerland	3.7	1.7	2.1	1.7
Yugoslavia			2.5	-3.2
Poland		6.8	4.8	4.2
Russian Federation	-3.0	0.9	-4.9	3.2
Turkey		7.5	3.1	-5.0
Ukraine			-1.9	-0.4
Hungary	-3.5	4.6	4.9	4.5
Average	2.2	2.2	2.1	1.8

Source : 1. Romanian Statistical Yearbook, 1990-1999, National Institute of Statistics

2. Eurostat Yearbook, 1989-1999 Data, European Commission.

3. World Data Book by Country, 2001/2002, Committee for Tsunataro Yano, Japan.

4. The World 2001, World Economic Information Service Inc., JETRO

Table 3.11.4 Forecast of International Tourist (Arrivals at Romania of Foreign Visitors) by Mode

(Unit : 1,000 Passengers)

Growth Scenario	Average Annual Growth Rate(%)	Mode	2000	2005	2010	2020
Low	3	Road	3,808	4,326	5,039	7,531
		Railway	660	798	996	1,547
		Air	655	816	1,092	1,866
		Ship	141	164	190	255
		Total	5,264	6,103	7,318	11,200
Medium	4	Road	3,808	4,633	5,636	8,343
		Railway	660	803	976	1,445
		Air	655	797	970	1,435
		Ship	141	172	209	310
		Total	5,264	6,404	7,792	11,533
High	6	Road	3,808	5,096	6,819	12,212
		Railway	660	883	1,181	2,115
		Air	655	876	1,173	2,101
		Ship	141	189	253	453
		Total	5,264	7,044	9,427	16,881

Table 3.11.5 Forecast of International Tourists of Foreign Visitors Destined to Constantza by Mode

(Unit : 1,000 Passengers)

Growth Scenario	Average Annual Growth Rate(%)	Mode from Abroad to Romania	Ratio of Visitors Destined to Constantza (%)	2000	2005	2010	2020
Low	3	Road	10	381	433	504	753
		Railway	5	33	40	50	77
		Air	5	33	41	55	93
		Ship	10	14	16	19	26
		Total		461	530	627	949
Medium	4	Road	15	571	695	845	1,251
		Railway	10	66	80	98	145
		Air	10	65	80	97	144
		Ship	20	141	172	209	309
		Total		844	1,026	1,249	1,848
High	6	Road	20	762	1,019	1,364	2,442
		Railway	15	99	132	177	317
		Air	15	98	131	176	315
		Ship	30	42	57	76	136
		Total		1,001	1,340	1,793	3,211

Table 3.11.6 Forecast of Passengers to Make Trip by Ship of International Tourists

(Unit : 1,000 Passengers)

Growth Scenario	Average Annual Growth Rate(%)	Mode from Abroad to Romania	Ratio of Visitors to Use Ship (%)	2005	2010	2020
Low	3	Road	10	43	50	75
		Railway	10	4	5	8
		Air	10	4	5	9
		Ship	10	2	2	3
		Total		53	63	95
Medium	4	Road	20	139	169	250
		Railway	20	16	20	29
		Air	20	16	19	29
		Ship	20	34	42	62
		Total		205	250	370
High	6	Road	30	306	409	733
		Railway	30	40	53	95
		Air	30	39	53	95
		Ship	30	17	23	41
		Total		402	538	963

Table 3.11.7 International Tourist (Departures of Romanian Visitors Abroad) by Mode

(Unit: 1,000 Passengers)

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Road	8,396	7,408	9,601	9,036	8,057	4,288	4,202	4,664	5,308	4,999	5,018
Railway	2,501	1,396	1,103	1,435	1,673	985	1,065	996	976	654	687
Air	265	169	152	176	193	299	324	405	448	489	535
Ship	113	105	49	110	182	165	157	178	161	132	148
Total	11,275	9,078	10,905	10,757	10,105	5,737	5,748	6,243	6,893	6,274	6,388
Annual Growth Rate(%)		-19.5	20.1	-1.4	-6.1	-43.2	0.2	8.6	10.4	-9.0	1.8

Source : Romanian Statistical Yearbook, 1990-1999, National Institute of Statistics

Table 3.11.8 Share of International Tourist (Departures of Romanian Visitors Abroad) by Mode

(Unit: %)

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Road	74.5	81.6	88.0	84.0	79.7	74.7	73.1	74.7	77.0	79.7	78.6
Railway	22.2	15.4	10.1	13.3	16.6	17.2	18.5	16.0	14.2	10.4	10.8
Air	2.4	1.9	1.4	1.6	1.9	5.2	5.6	6.5	6.5	7.8	8.4
Ship	1.0	1.2	0.4	1.0	1.8	2.9	2.7	2.9	2.3	2.1	2.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 3.11.9 Annual Growth Rate of GDP in Romania in Market Prices

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Growth Rate (%)	-5.60	-12.90	-8.80	1.50	3.90	7.10	3.90	-6.10	-5.40	-3.20

Tale Table 3.11.10 Growth Scenario of GDP for Romania

Growth Scenario	Average Annual Growth Scenario (%)		
	2000~2005	2006~2010	2011~2020
Low	2.6	3.1	4.1
Medium	3.9	4.6	4.5
High	4.5	6.0	5.5

Table 3.11.11 Forecast of International Tourist (Departures of Romanian Visitors Abroad) by Mode

(Unit : 1,000 Passengers)

Growth Scenario	Mode	2000	2005	2010	2020
Low	Road	5,018	5,701	6,641	9,925
	Railway	687	780	909	1,359
	Air	535	608	708	1,058
	Ship	148	168	195	292
	Total	6,388	7,257	8,453	12,634
Medium	Road	5,018	6,069	7,581	11,773
	Railway	687	831	1,038	1,612
	Air	535	647	808	1,255
	Ship	148	178	223	346
	Total	6,388	7,725	9,650	14,986
High	Road	5,018	6,254	8,369	14,295
	Railway	687	856	1,146	1,957
	Air	535	666	892	1,523
	Ship	148	184	246	420
	Total	6,388	7,960	10,653	18,196

Table 3.11.12 Forecast of International Tourist (Departures of Romanian Visitors Abroad) by Mode Via the Port of Constantza

(Unit : 1,000 Passengers)

Growth Scenario	Mode from Romania	Diversion Rate of Passengers Via the Port of Constantza (%)	2005	2010	2020
Low	Road	3	171	199	298
	Railway	4	31	36	54
	Air	1	6	7	11
	Ship	30	50	59	88
	Total		259	301	450
Medium	Road	4	243	303	471
	Railway	5	42	52	81
	Air	2	13	16	25
	Ship	40	71	89	138
	Total		369	460	715
High	Road	5	313	418	715
	Railway	6	51	69	117
	Air	3	20	27	46
	Ship	50	92	123	210
	Total		476	637	1,088

Table 3.11.13 Passenger Intercity and International Transport (Passengers)

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Railway	407,931	362,583	232,758	225,397	206,920	210,738	212,893	186,615	146,800	129,339	117,501
Road	780,666	770,403	694,071	528,902	425,142	413,502	389,461	379,444	224,261	192,633	205,978
River	1,637	1,361	1,124	868	1,986	2,042	2,399	2,035	1,923	1,654	1,561
Air	2,738	1,712	1,714	1,747	1,978	1,963	1,360	1,034	1,008	1,048	1,282
Total	1,192,972	1,136,059	929,667	756,914	636,026	628,245	606,113	569,128	373,992	324,674	326,322

(Unit:1,000 Passenger)

Source : Rommanian Statistical Yearbook, 1990-1999, National Institute of Statistics

Table 3.11.14 Estimated Passenger Intercity Transport (Passengers)

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Railway	99	403,852	358,957	230,430	223,143	204,851	208,631	210,764	184,749	145,332	128,046
Road	99	772,859	762,699	687,130	523,613	420,891	409,367	385,566	375,650	222,018	203,918
River	96	1,572	1,307	1,079	833	1,907	1,960	2,303	1,954	1,846	1,499
Air	87	2,382	1,489	1,491	1,520	1,721	1,708	1,183	900	877	912
Total		1,180,665	1,124,452	920,131	749,109	629,369	621,666	599,817	563,252	370,073	322,858

(Unit:1,000 Passenger)

Source : Rommanian Statistical Yearbook, 1990-1999, National Institute of Statistics

Note : *1) is based on the actual traffic in the Year of 2000.

Table 3.11.15 Passenger Intercity and International Transport(Passengers - km)

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Railway	30,582	25,429	24,269	19,402	18,313	18,879	18,356	15,795	13,422	12,304
Road	24,007	20,835	25,649	20,512	14,058	12,343	12,842	13,531	8,962	8,323
River	58	33	26	25	22	24	17	16	13	11
Air	3,418	2,694	2,732	2,748	3,521	3,415	2,327	1,857	1,827	1,887
Total	58,065	48,991	52,676	42,687	35,914	34,661	33,542	31,199	24,224	22,525

(Unit:Million Passenger Km)

Source : Rommanian Statistical Yearbook, 1990-1999, National Institute of Statistics

Table 3.11.16 Forecast of Domestic Intercity passenger by Mode

(Unit : 1,000 Passengers)

Growth Scenario	Mode	2000	2005	2010	2020
Low	Road	116,326	132,148	153,941	230,071
	Railway	203,918	231,654	269,857	403,312
	Air	1,499	1,702	1,983	2,964
	Ship	1,115	1,267	1,476	2,206
	Total	322,858	366,772	427,257	638,552
Medium	Road	116,326	132,148	153,941	230,071
	Railway	203,918	231,654	269,857	403,312
	Air	1,499	1,702	1,983	2,964
	Ship	1,115	1,267	1,476	2,206
	Total	322,858	366,772	427,257	638,552
High	Road	116,326	132,148	153,941	230,071
	Railway	203,918	231,654	269,857	403,312
	Air	1,499	1,702	1,983	2,964
	Ship	1,115	1,267	1,476	2,206
	Total	322,858	366,772	427,257	638,552

Table 3.11.17 Forecast of Domestic Intercity Passenger Destined to Constantza by Mode

(Unit : 1,000 Passengers)

Growth Scenario	Mode of Intercity Passengers	Ratio of Visitors Destined to Constantza (%)	2005	2010	2020
Low	Road	5	100	7,697	11,504
	Railway	2	4,633	5,397	8,066
	Air	2	34	40	59
	Ship	5	63	74	110
	Total		4,831	13,208	19,739
Medium	Road	6	7,929	9,236	13,804
	Railway	3	6,950	8,096	12,099
	Air	3	51	59	89
	Ship	6	76	89	132
	Total		15,006	17,480	26,125
High	Road	7	9,250	10,776	16,105
	Railway	4	9,266	10,794	16,132
	Air	4	68	79	119
	Ship	7	89	103	154
	Total		18,673	21,753	32,510

Table 3.11.18 Forecast of Passengers to Make Trip by Ship of Domestic Intercity Passengers Destined to Constantza

(Unit : 1,000 Passengers)

Growth Scenario	Mode of Intercity Passengers	Ratio of passenger to Use Ship (%)	2005	2010	2020
Low	Road	5	5	385	575
	Railway	5	232	270	403
	Air	5	2	2	3
	Ship	5	3	4	6
	Total		242	660	987
Medium	Road	10	793	924	1,380
	Railway	10	695	810	1,210
	Air	10	5	6	9
	Ship	10	8	9	13
	Total		1,501	1,748	2,612
High	Road	15	1,388	1,616	2,416
	Railway	15	1,390	1,619	2,420
	Air	15	10	12	18
	Ship	15	13	15	23
	Total		2,801	3,263	4,877

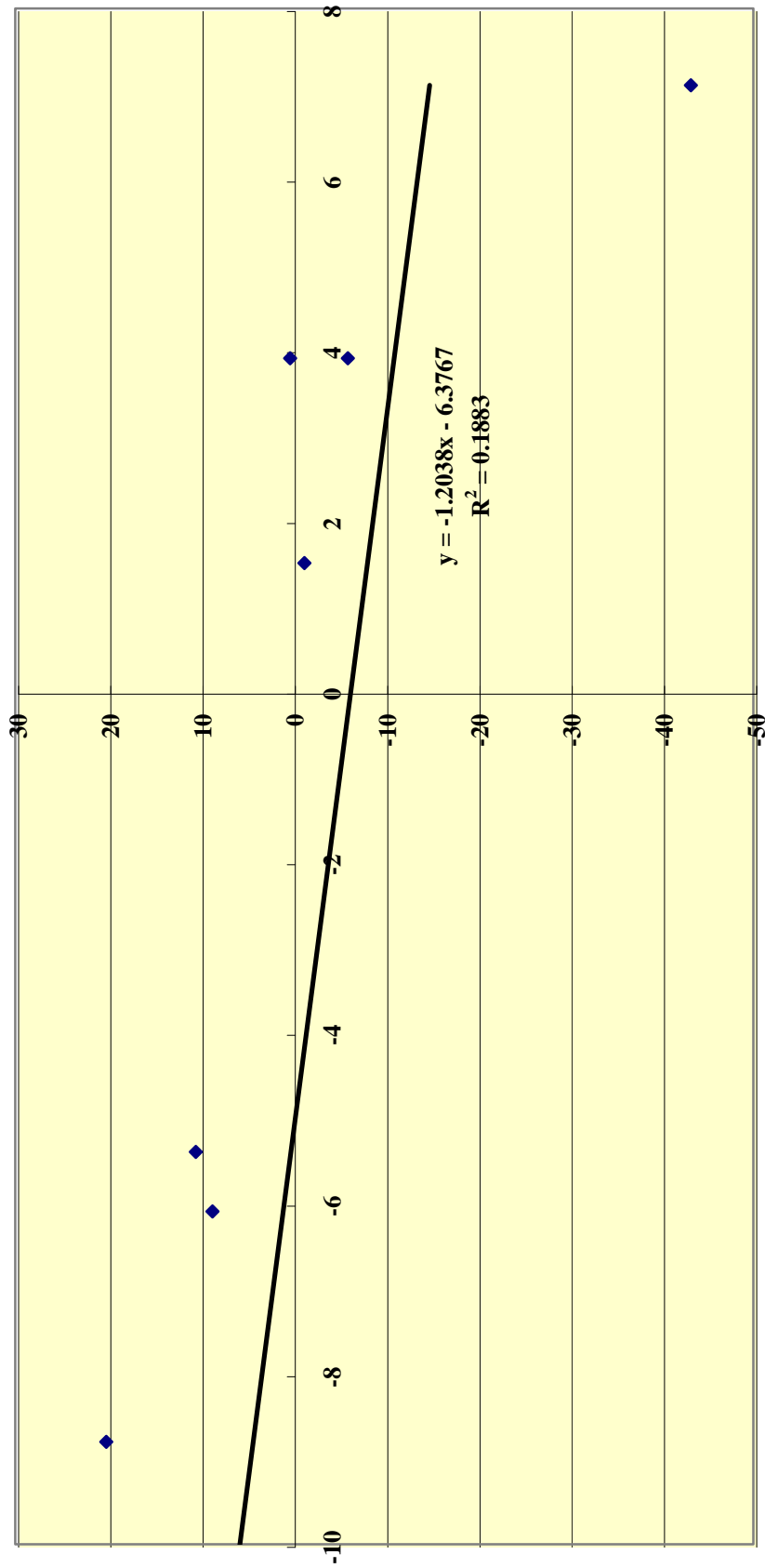


Figure 3.11.1
 Relation between Annual Growth Rate of GDP and Annual Growth Rate of International Tourists of Departures from Romanian Abroad