

PREFACE

The 2013 *ITF Transport Outlook* examines scenarios for the development of global transport volumes through 2050. The analysis highlights the impact of alternative scenarios for economic growth on passenger and freight flows and the consequences of rapid urbanisation outside the OECD on overall transport volumes and CO₂ emissions.

The approach taken is to explore the factors that could drive supply and demand for transport services to higher or lower bounds. Rather than attempting to establish a likely central forecast for the evolution of transport volumes, the *ITF Transport Outlook* instead focuses on scenarios that illustrate the potential upper and lower tracks that might unfold depending on policies adopted and key external factors including oil prices and overall GDP. Under any scenario, transport volumes grow very strongly in non-OECD economies and curbing negative side-effects, including greenhouse gas emissions, local pollution and congestion, will be a major challenge.

As in earlier editions, the 2013 *ITF Transport Outlook* addresses topics discussed at the annual ITF Summit. The 2013 Summit focused on Funding Transport and the Outlook incorporates insights from debate at the Summit. This edition discusses the challenge of establishing sustainable funding mechanisms for the transport sector, emphasising the need for long run funding strategies in a context of growing global investment demand. It also integrates the previously distinct *Trends in the Transport Sector* publication.

The *ITF Transport Outlook* also provides the starting point for discussions at the ITF's 2014 Annual Summit which takes the theme of "Transport for a Changing World".



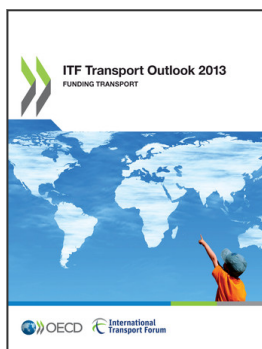
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FOREWORD

The *ITF Transport Outlook* brings together statistics on recent trends in transport and scenario analysis for the long term. It identifies the drivers of past trends and possible future trends and discusses their relevance to policy making. The Outlook aims to be an aid to the analysis of strategic policy concerns.

The *ITF Transport Outlook* is a collaborative effort. This expanded edition is produced in close co-ordination with OECD Publishing. The long term scenario analysis is based on the International Energy Agency's MoMo-model in combination with tools developed by the International Transport Forum. The IEA's willingness to share the model is gratefully acknowledged. At the ITF, Aimée Aguilar Jaber and Martin Clever deserve credit for model development and implementation. The statistics team, Jari Kauppila, Mario Barreto and Edouard Chong produced most of the factual information discussed in Chapter 1. Kurt Van Dender co-ordinated the work and developed the analytical framework and conclusions, drawing from recent work of the ITF's research centre among other sources.



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