

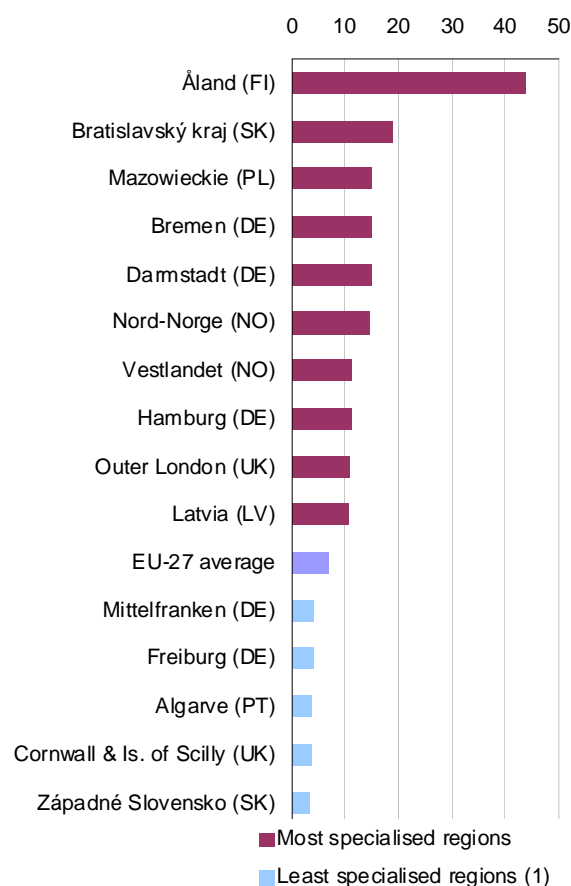
Regional specialisation within transport services

Transport services include land, air and water transport, as well as supporting and auxiliary transport services. In the EU-27 employment in these services reached a total of 9 million persons in 2006, equivalent to 6.9 % of all employment in the non-financial business economy. Among the four NACE divisions that make up transport services, the largest by far is land transport (including transport via pipelines), with more than half of all transport services employment.

Several of the regions within the EU and Norway that are most specialised in transport services are in fact particularly specialised in one type of service. The most notable example is the Finnish island region of Åland, which has by far the highest employment specialisation of any region in the EU-27 and Norway, largely due to its exceptionally high specialisation in water transport services. The next most specialised regions, Bratislavský kraj in Slovakia and Mazowieckie in Poland, were both particularly specialised in land transport, while Bremen and Darmstadt in Germany both owe their high ranking mainly to their supporting and auxiliary transport activities and activities of travel agencies.

The three regions with the largest transport services workforces were the capital city regions of France, Spain and Poland. Spain with Comunidad de Madrid and Illes Balears also recorded the largest percentage increase in employment in these services during the five years from 2001 to 2006.

Figure 1: The most and least specialised regions in transport services, EU-27 and Norway, 2006 - Share of non-financial business economy employment of the regions (%)



(1) Norte (Portugal), La Rioja, and Border, Midlands and Western (Ireland), confidential, but among the least specialised regions.

Source: Eurostat ([sbs_r_nuts03](#))

Transport services

This analysis of the transport services sector focuses principally on the provision of transport services to clients for hire and reward: as such it differs from functional transport statistics that include these transport services as well as own transport (whether by business or households).

Table 1: Transport services employment – largest and fastest growing regions, NUTS 2 level, EU-27 and Norway (1)

Region		Number of persons employed 2006	Rate of change 2006/2001 (%) (2)
Largest regions (3)			
Île de France	FR10	345 149	0.0
Comunidad de Madrid	ES30	241 921	16.7
Mazowieckie	PL12	207 227	5.6
Lombardia	ITC4	187 482	1.8
Darmstadt	DE71	171 754	2.8
Cataluña	ES51	149 473	5.0
Outer London	UKI2	126 523	6.8
Lazio	ITE4	117 823	0.2
Rhône-Alpes	FR71	113 014	0.6
Düsseldorf	DEA1	105 048	2.3
Fastest growing regions			
Comunidad de Madrid	ES30	241 921	16.7
Illes Balears	ES53	35 064	15.3
Bremen	DE50	31 528	10.0
Trier	DEB2	5 837	9.7
Leicestershire, Rutland & Northants.	UKF2	43 092	9.0
Región de Murcia (4)	ES62	20 260	8.1
Merseyside	UKD5	22 786	7.8
Aragón	ES24	c	c
Brandenburg - Südwest	DE42	21 189	7.5
Corse	FR83	5 375	7.4

(1) Cyprus and Luxembourg, enterprise data.

(2) Slovenia, 2000 to 2005; Ireland, United Kingdom and Norway, 2000 to 2006; Czech Republic 2002 to 2006.

(3) Regions not available at NUTS level 2 have been excluded (regions in Bulgaria, Denmark, Portugal and Slovenia).

(4) Rounded estimates based on non-confidential data.

Source: Eurostat ([sbs_r_nuts03](#))

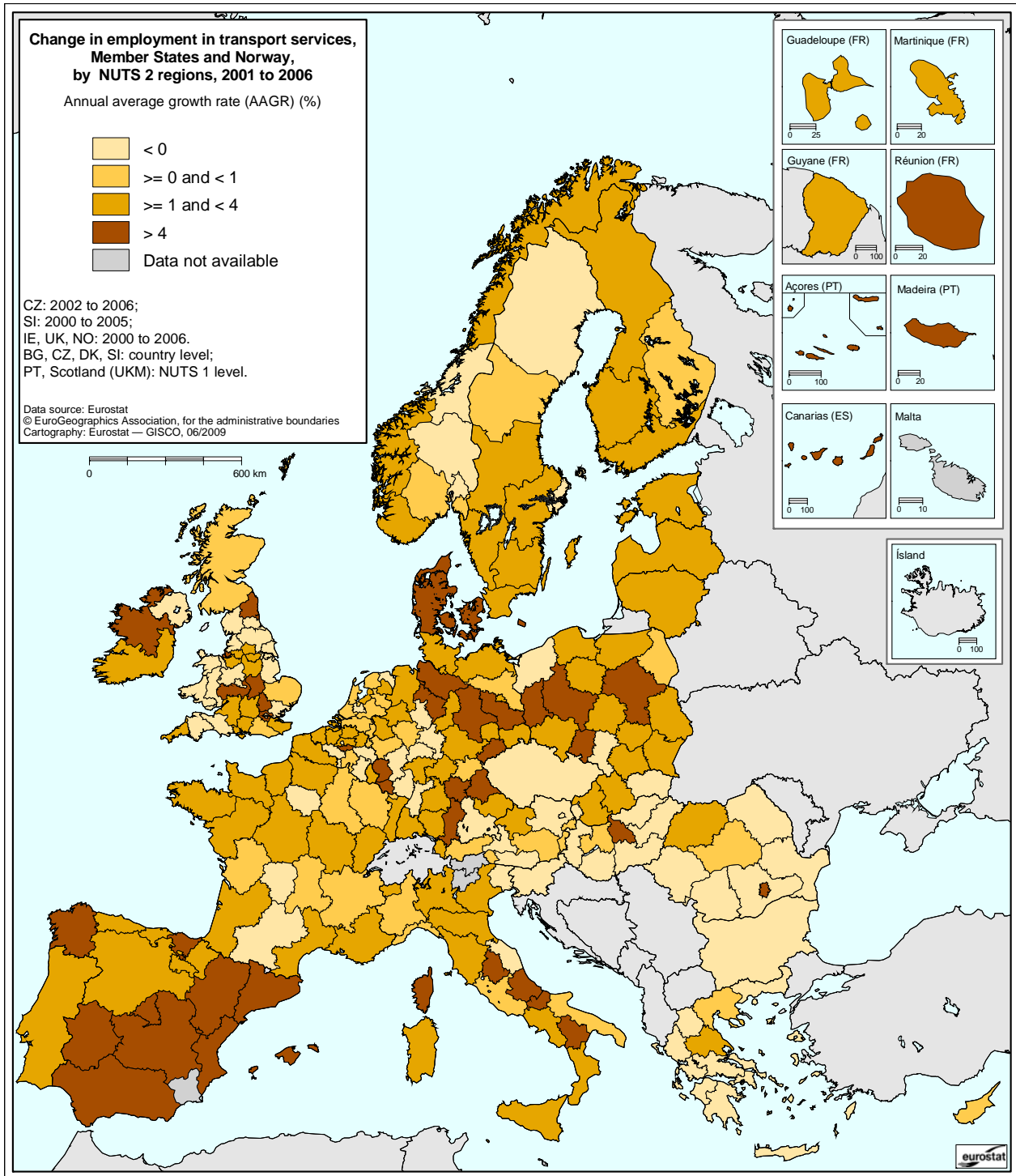
The share of a particular activity within the non-financial business economy of a region gives an idea of which regions are the most or least specialised in a certain activity, regardless of whether the region or the activity considered are large or small. As a whole, the share of transport services in non-financial business economy employment is concentrated within a relatively narrow range, with a small number of regions being outliers with a very high degree of specialisation in these activities - see Figure 1. As shown later many of these outliers are specialised in transport services because of a very strong specialisation in one particular type of transport service.

The regional distribution of transport services is influenced by a number of factors, essentially focused on a concentration of customers and access to transport infrastructure. In employment terms the three regions with the largest transport services workforces were the capital city regions of France, Spain and Poland. The other regions in the top 10 (listed in Table 1) also included major urban areas, such as Milano in Lombardia, Frankfurt in Darmstadt, Barcelona in Cataluña, Roma in Lazio and Lyon in the Rhône-Alpes.

Between 2001 and 2006 employment in transport services in the EU-27 grew on average by an estimated 1.9 % per annum. Several of the regions with the largest transport services workforces recorded employment increases above this average, most notably both of the two large Spanish regions as well as Outer London and Mazowieckie which all recorded average growth of 5 % per annum or more. In fact, the Comunidad de Madrid had not only the second largest transport services workforce, it also recorded the highest employment growth rate in transport services of any region in the EU-27 and Norway during the five years from 2001 to 2006. Three other Spanish regions also recorded particularly large increases in transport services employment: the Illes Balears, the Región de Murcia and Aragon. Three regions from Germany and two from the United Kingdom also figured in the top ten fastest growing regions for transport services employment.

Over this five-year period from 2001 to 2006 a fall in transport services employment was recorded in 68 of the 248 regions for which data are available. Del-Dunantul in Hungary, Karlsruhe in Germany and Śląskie in Poland all recorded an average fall in transport services of 10 % or more per annum.

Map 1: Change in employment in transport services, by NUTS 2 regions, 2001-2006
Annual average growth rate (%)



Regional specialisation

Within land transport, the importance of urban transport such as light railways, metros, buses and trolleybuses is concentrated in densely populated areas; equally inter-urban rail networks tend to be focused on connections between larger urban areas. In contrast to land passenger transport, specialisation in road freight transport services may be linked to a number of factors such as access to terminals for other transport modes such as ports, proximity to key industrial customers requiring the inward transport of materials or the outward delivery of finished goods, proximity to warehousing and distribution centres and access to the motorway network.

Water transport services include maritime and inland waterways transport. The provision of water transport services is dependent upon a region having a coastal access for maritime transport, or access to a navigable waterway for inland waterway transport. Maritime transport is the dominant part of the activity in the EU-27 and Norway as a whole, despite many regions being landlocked. As a result regions specialised in water transport tend to be very specialised, while unspecialised regions have close to no activity in water transport services. This can be seen from the very large differences between the average share of water transport services within non-financial business economy employment in the EU-27 (0.2 %), and the equivalent shares in the most specialised regions. Among the five most specialised regions are two island regions (Åland and Kriti), two regions that together make up nearly all of the east coast of Norway, where water transport is a major means of transport because of the difficulties of land transport in the hinterland, and Hamburg, which includes the third largest sea port for freight in the EU-27 and Norway.

In many cases air transport services tend to be located close to urban areas: depending on the way the regional classification is organised these may be in the region of the urban area itself (for example, a region with the capital city), or in a region neighbouring the urban area, such as Outer London in the United Kingdom. As well as densely populated regions, other regions that are relatively specialised in air transport include popular tourist destinations, particularly those that can not be accessed by land, for example, Corse in France and the Illes Balears in Spain. As with water transport, regions tend to be either highly specialised or highly unspecialised in air transport, with the employment share of air transport in specialised regions many times greater than the EU-27 average.

The regional specialisation of supporting and auxiliary transport activities and activities of travel agencies is to a large extent related to the particular transport services that are supported. The operation of railway infrastructure, airports and ports is clearly related to the regional specialisation of the underlying transport modes. More general services such as warehousing can be related to more or less any transport mode, as to a large extent can the services of travel agents and tour operators which are also related more generally to the level of outgoing and incoming tourism. The three most specialised regions in this activity are all in Germany: for Bremen and Hamburg the specialisation in supporting and auxiliary activities may be linked to their relative specialisation in water transport services, while the region of Darmstadt (which includes Frankfurt and its airport) is specialised in both air and land transport.

Table 2: Top five most specialised regions in transport services activities
Share of non-financial business economy employment of the regions (%)

Most specialised regions		Share (%)
Land transport, transport via pipelines		
Bratislavský kraj	SK01	15.8
Mazowieckie	PL12	12.9
Rheinessen-Pfalz	DEB3	8.5
Prov. Namur	BE35	8.4
Itä-Suomi	FI13	7.8
EU-27 average		4.3
Water transport		
Åland	FI20	38.7
Vestlandet	NO05	4.1
Nord-Norge	NO07	3.3
Kriti	GR43	2.4
Hamburg	DE60	2.3
EU-27 average		0.2
Air transport		
Outer London	UKI2	3.9
Noord-Holland	NL32	3.4
Corse	FR83	2.9
Köln	DEA2	2.4
Illes Balears	ES53	2.3
EU-27 average		0.3
Supporting & auxiliary transport activities		
Bremen	DE50	11.0
Darmstadt	DE71	8.7
Hamburg	DE60	6.6
Ciudad Autónoma de Ceuta	ES63	5.4
Liguria	ITC3	4.8
EU-27 average		2.1

Source: Eurostat ([sbs_r_nuts03](#))

Regional concentration of employment in transport services

As noted above, access to infrastructure is an important factor for the provision of some transport services. This is reflected in an analysis of the concentration of certain activities.

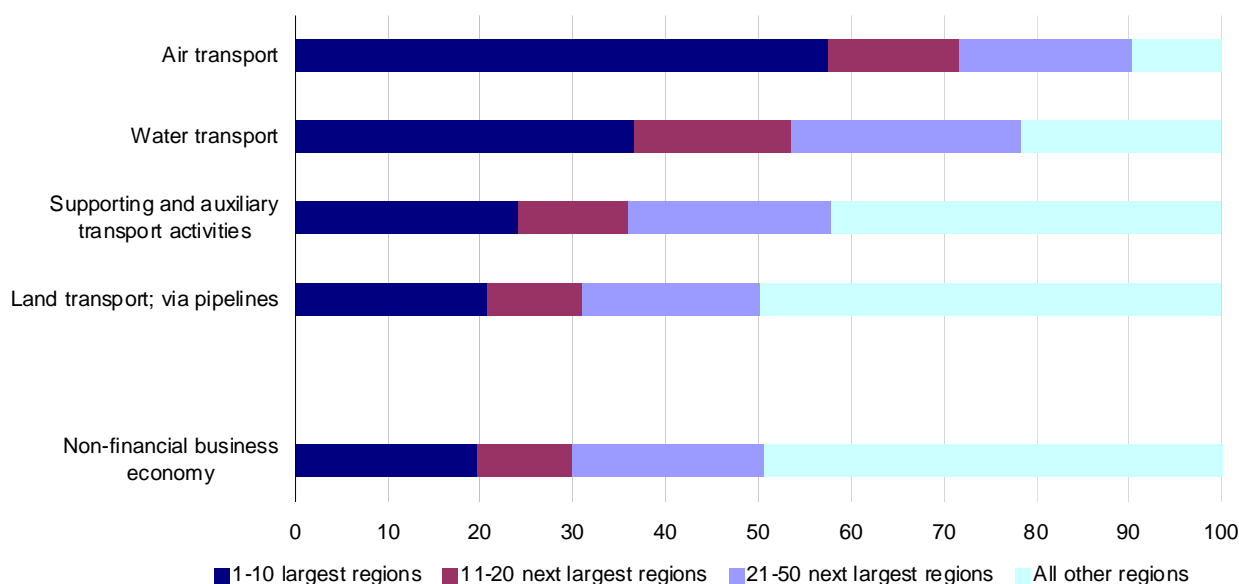
The very high concentration in air transport services around a small number of major international airports is reflected in the fact that the ten regions with the largest level of air transport employment together accounted for more than half of the EU-27 and Norway's employment in this sector; the 20 largest accounted for more than two thirds of the total.

Similarly, the dominance of maritime transport within water transport services, and the concentration of maritime transport service providers around major ports results in a high regional concentration of water transport services. The ten largest regions in terms of water transport services' employment contributed more than one third of EU-27 and Norway employment in this sector, and the top 20 contributed more than one half of the total.

Supporting and auxiliary transport activities and activities of travel agencies have a notably lower regional concentration, only slightly higher than the average for the non-financial business economy. The 50 largest regions in this sector accounted for just over half (58 %) of the total. This reflects the fact that support services are not just concentrated at terminals (such as stations, ports and aircrafts), but also manage infrastructure between terminals. Furthermore, in the case of travel agencies, these are relatively widespread in all urban areas, not just the largest.

As land transport is less focused on providing long-distance transport (as is the case with most air and water transport), and access to both road and rail networks is widespread, it is unsurprising that the regional concentration for land transport is much lower than for air or water transport. In fact the level of concentration of employment in land transport services within the 10, 20 and 50 largest regions very closely mirrors the average concentration for the non-financial business economy as a whole.

Figure 2: Regional concentration of transport services employment, by division, NUTS 2 level for EU-27 and Norway, 2006
Share of the largest regions in total (EU-27 and Norway) sectoral employment (%)



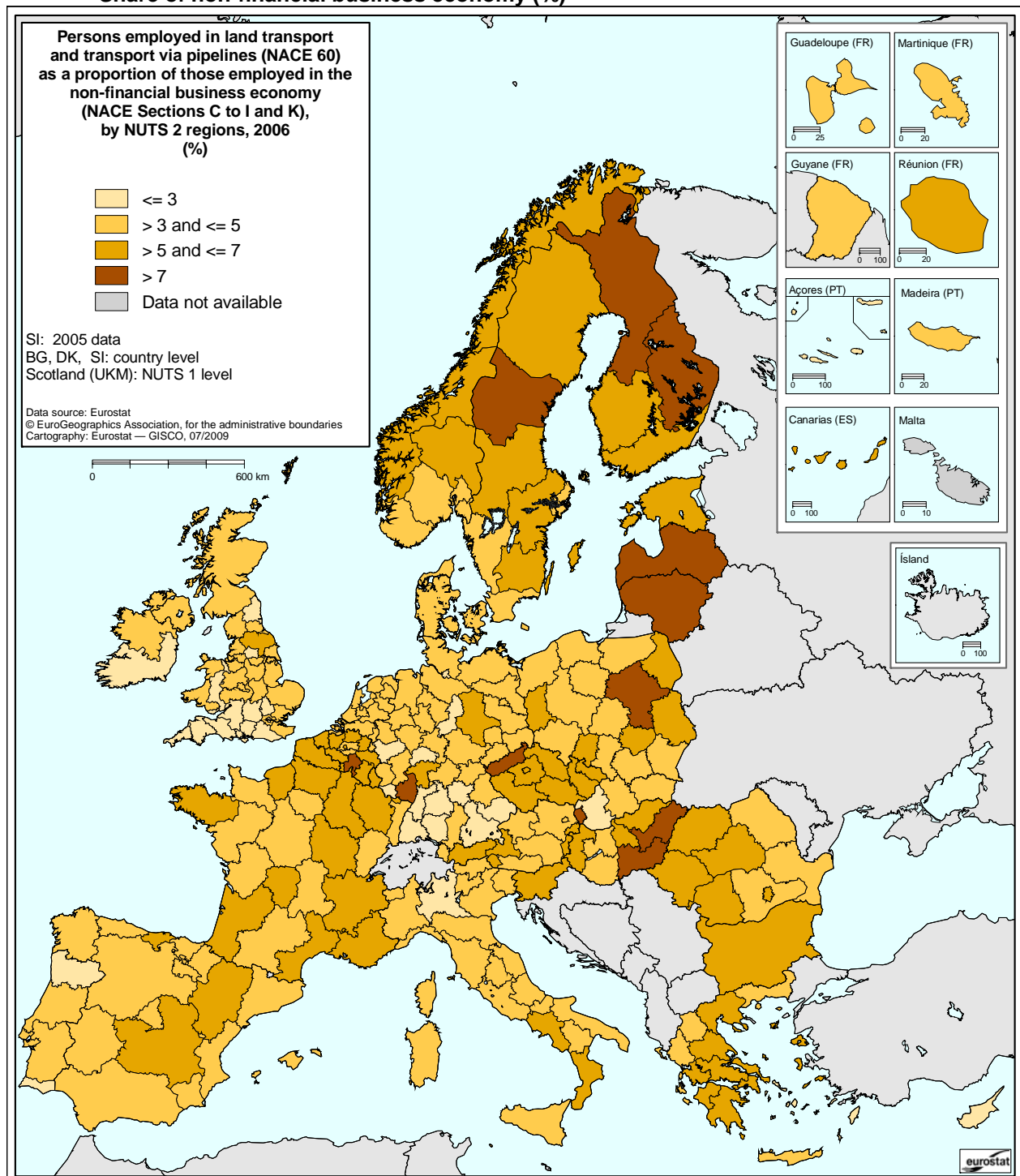
Source: Eurostat ([sbs_r_nuts03](#))

Land transport specialisation

Map 2 shows the regional specialisation of employment in the largest of the transport services sectors, namely land transport. The particularly high importance of land transport services in the capital regions of Slovakia and Poland, and more widely in some regions of the landlocked Czech Republic and Hungary can be explained in part by the location of these regions on East-West road transport axis through Europe.

Relatively high regional specialisation of employment in land transport is also notable in several regions in northern and north-eastern Europe, notably in Sweden, Finland, Latvia and Lithuania, as well as in the hinterland of major North Sea ports, notably in Belgium.

Map 2: Persons employed in land transport and transport via pipelines, by NUTS 2 regions, 2006
Share of non-financial business economy (%)



Location of major freight sea ports and passenger airports

In terms of freight movements, eight of the ten largest sea ports in 2007 in the EU-27 and Norway were on the North Sea coast. Rotterdam was the largest of all, with 374.2 million tonnes of freight loaded and unloaded in 2007, more than twice the volume of the next largest port, Antwerp.

In 2007 the EU-27's largest airport in passenger terms was London Heathrow with 67.9 million passengers. As regards freight traffic, the largest airport in the EU-27 was Frankfurt with 2.2 million tonnes of loaded and unloaded freight and mail in 2007.

Table 3: Top 10 sea ports ranked by freight traffic, EU-27 and Norway (million tonnes)

		2007
Rotterdam	Netherlands	374.2
Antwerp	Belgium	165.5
Hamburg	Germany	118.2
Marseille	France	92.6
Le Havre	France	78.9
Grimsby & Immingham	United Kingdom	66.3
Amsterdam	Netherlands	62.5
Algeciras	Spain	62.1
Bergen	Norway	61.2
London	United Kingdom	52.7

Source: Eurostat ([mar_go_aa](#))

Table 4: Top 10 airports ranked by number of passengers carried, EU-27 and Norway (million passengers)

		2007
London Heathrow	United Kingdom	67.9
Paris Ch. de Gaulle	France	59.5
Frankfurt	Germany	53.9
Madrid Barajas	Spain	51.2
Amsterdam Schiphol	Netherlands	47.8
London Gatwick	United Kingdom	35.2
München F.J. Strauss	Germany	33.8
Barcelona Transoceanico	Spain	32.7
Roma Fiumicino	Italy	32.4
Paris Orly	France	26.4

Source: Eurostat ([avia_paoa](#))

METHODOLOGICAL NOTES

Sources

The main source for the data used in this publication is Eurostat's structural business statistics (SBS), with additional information from Eurostat's transport statistics. SBS data have been collected within the legal framework provided by [Council Regulation No 58/97](#) of 20 December 1996 concerning structural business statistics, which aims to provide data which is comparable between the Member States on the structure, activity, competitiveness and performance of businesses.

Business statistics are available from Eurostat's database within the industry, trade and services theme.

Definitions

Employment is based on the **number of persons employed**. This includes all persons who work in the observation unit (including working proprietors and unpaid family workers), as well as persons who work outside the unit who belong to it and are paid by it. Part-time, seasonal and home workers on the payroll are included, as well as apprentices.

Statistical unit

The observation unit for regional SBS data is normally the local unit, which is an enterprise, or part of one, situated in one geographically identified place. Local units are classified based on NACE according to their principal activity. As an enterprise can consist of several local units, it is possible for the principal activity of the local unit to differ from that of the enterprise to which it belongs – hence, national and regional structural business statistics are not entirely comparable.

For Luxembourg data are based on enterprises and not local units, and it is believed that this may also be the case for some other countries.

Classifications and notes

The classification of activities used in this publication is NACE Rev. 1.1. For the purposes of this publication the non-financial business economy is defined as Sections C to I and K. For Cyprus, Division 73 (research and development activity) is excluded.

The transport services Divisions are:

- 60: Land transport; transport via pipelines
- 61: Water transport
- 62: Air transport
- 63: Supporting and auxiliary transport activities; activities of travel agencies

The regional classification used is the 2006 version of NUTS (¹). Data are generally presented at level 2 of the NUTS classification. Data for Bulgaria, Denmark and Slovenia are presented at the national level. Data for region UKM (Scotland) is presented at level 1 of NUTS.

Reference year and notes

The SBS data presented are generally for the reference year 2006. Data for Slovenia are for 2005. For Bulgaria data for 2005 for the construction sector was combined with 2006 data for all other sectors to produce the non-financial business economy total.

Data for the EU-27 average may include rounded estimates.

Abbreviations and symbols

EU-27 European Union of 27 Member States
c (in tables) confidential

⁽¹⁾ http://ec.europa.eu/eurostat/ramon/nuts/splash_regions.html

Further information

Data: [Eurostat Website: http://ec.europa.eu/eurostat](http://ec.europa.eu/eurostat)

Data on structural business statistics:

http://epp.eurostat.ec.europa.eu/portal/page/portal/european_business/data/database

More information about structural business statistics:

http://epp.eurostat.ec.europa.eu/portal/page/portal/european_business/introduction

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