



Towards an integrated transport system in the Baltic Sea Region

TransBaltic - the project overview

Presentation at the TransBaltic stakeholders debate, Riga, 14 September 2011

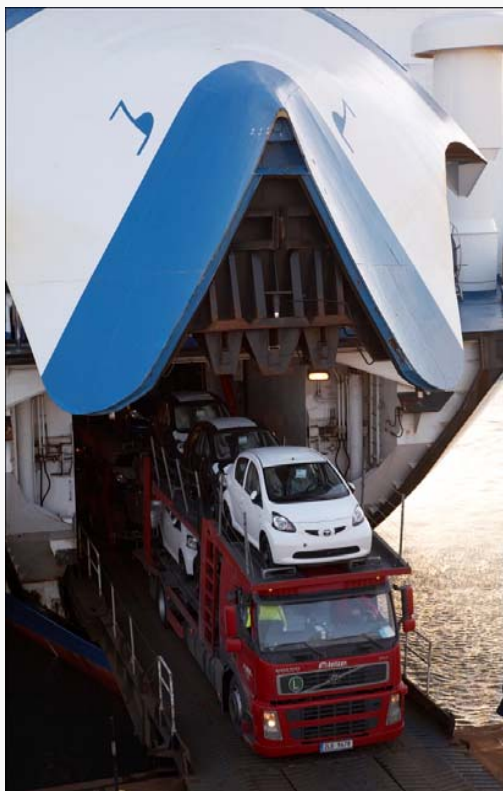
Wiktor Szydarowski
project manager



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TransBaltic in a nutshell



- **Strategic project** in the Baltic Sea Region Programme 2007-2013, initiated by the **regions** (led by Region Skåne)
- Project listed in the **EU Baltic Sea Strategy** (cooperate for smarter transport - **green corridors**)
- 50 financial and associated partners from 11 BSR countries
- **Meeting place** for stakeholders to discuss policy challenges
- **Keywords:** internal and external accessibility of the BSR, gateway function, future transport flows, regional growth, green transport solutions
- Main **deliverables:** pan-Baltic traffic forecasts and scenarios till 2030, macroregional transport action plan, pilot commercial concepts in transport and logistics, transport and regional policy recommendations



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The TransBaltic cuisine...

Best practice inventories, results of previous initiatives



Green network analyses (links & terminals 2030)



Transport policy challenges

- New regulations and policy instruments vs. trade patterns
- Labour force education and learning needs
- New East-West divide
- A place-based approach (territorial cohesion, sustainable regional growth)

Transport flow scenarios 2030

BASELINE

COHESION

RIVALRY

GREEN

Impact of transcontinental flows

Pilot demos to green the corridors

- Dry ports
- Pre-gate parking system
- Management of empty containers
- Internet tools for better use of intermodal transport by SMEs
- Better skills in harbour services
- New solutions to increase rail freight

Corridor investigation, case studies

Input from the allied projects (umbrella)

Macroregional action plan (policy support for an integrated multimodal transport system in the Baltic Sea Region)



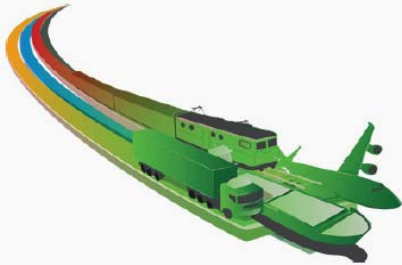
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Departure point for the green corridor concept



What makes the transport corridor 'green'?

- low impact on human and natural environment + energy efficiency
- complementarity of modes (road, rail, short sea shipping, inland waterways)
- relevant facilities (seaports, inland terminals etc.) and supply points (biofuels, hydrogen fuel etc.)
- innovative technologies (e.g. to manage and control the traffic)
- harmonised rules and open access for all interested users

Source: Freight Transport Logistics Action Plan (EC 2007)



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Turbulent policy environment for the green corridor concept...



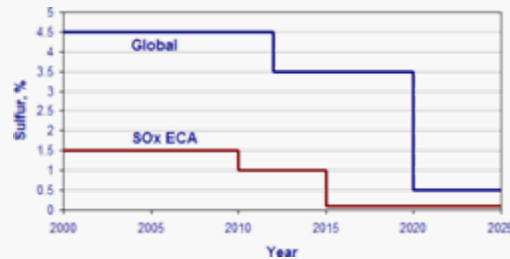
EU Baltic Sea Strategy



Europe 2020 priorities



White Paper 2011



MARPOL fuel sulphur limits



Future EU Cohesion Policy



Revised and extended TEN-T



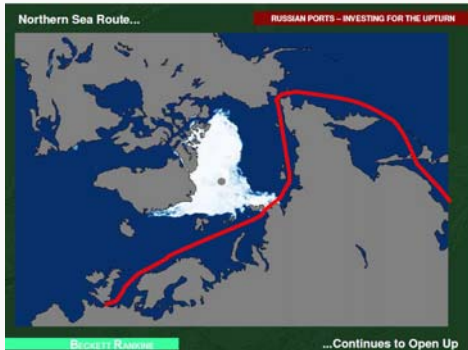
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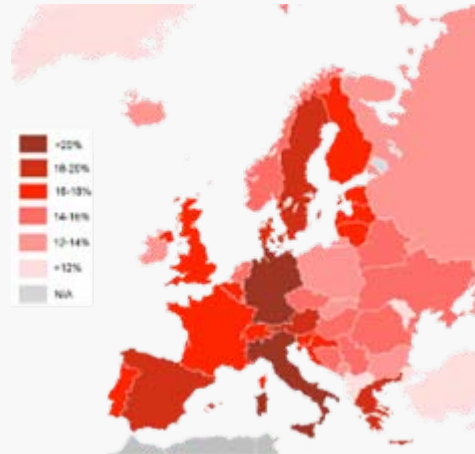
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...and natural and infrastructural developments



Northern Sea Route



Source: Wikipedia



The landbridge



Emerging new Baltic hubs
(Gdansk? Ust-Luga?)

Europe's ageing
population and
migration processes

India to become the
world economic power



Source: www.voxeu.org/index.php?q=node/4428



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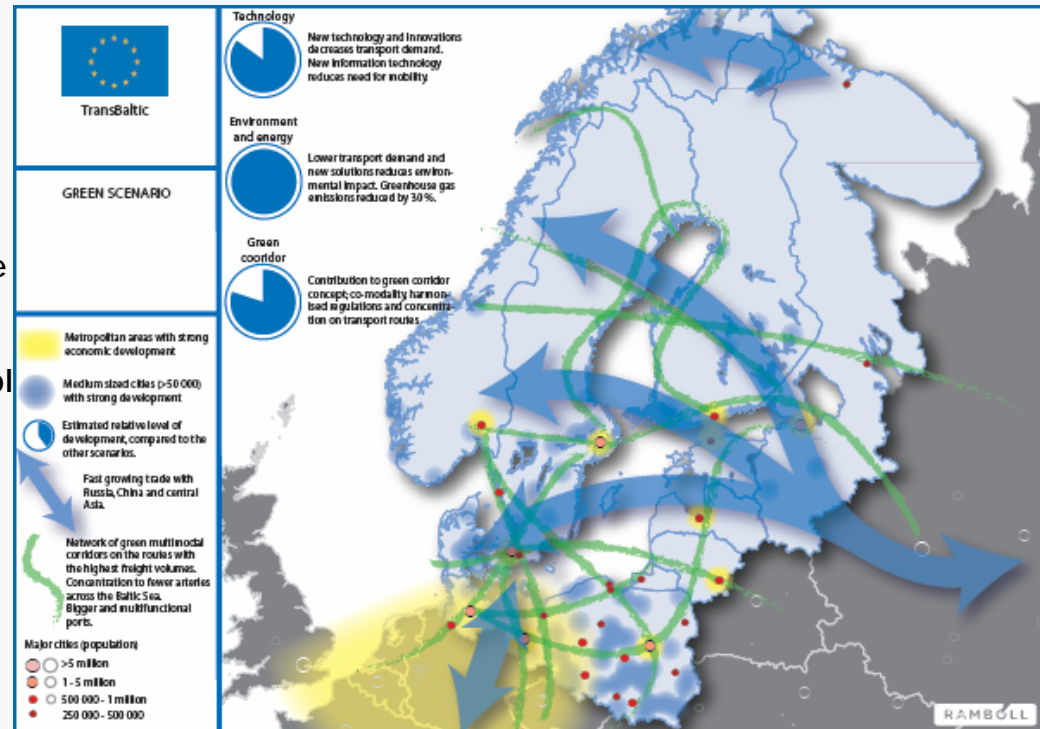


...can change geography of freight flows in the BSR

- Drop in port turnover volumes on the Baltic Sea, some lines out? (IMO regulation)
- Preferred Mediterranean routes and feeding of Adriatic/Mediterranean ports from the BSR by trucks?
- Dynamic container feeder service from Gdansk/Gdynia as a new gateway to BSR market; southern Scandinavia a new hinterland?
- Fewer transit corridors and bigger, multifunctional ports competing for Asian cargo (China, India)?
- Boom in rail services to Russian ports?
- Barents vs. South Baltic? Centre of political gravity moving north?

The green scenario as one of possible trajectories till 2030...

- Surge of **eco-consciousness** (e.g. higher demand for environmental friendly vehicles, locally produced goods and products with low environment impact)
- Concentration of public resources in '**green economy**' sectors
- **Policy ambitions** achieved: higher targets of the Europe 2020 strategy met (GHG emissions reduced by 30% compared with 1990 levels) + decreased transport demand + shift in modal split in favour of rail and waterborne transport
- More **balanced development** in rural and urban areas, fast growth of medium-sized cities in metropolitan hinterlands serviced by efficient public transport networks
- **Harmonisation** measures (e.g. carbon taxes, certification, product labelling of terminals and particular services, common cargo safety standards etc.) to balance business models with societal expectations



DRAFT as of 7 September 2011



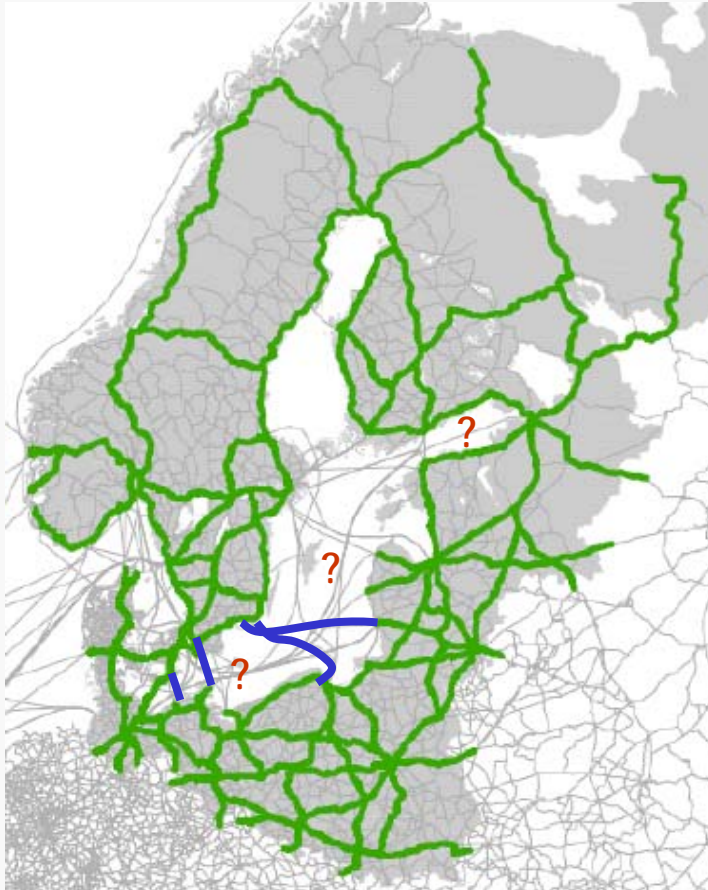
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Featuring a network of green multimodal transport corridors...



- Target: **green corridors** spread over the whole BSR territory
- New **TEN-T links** + **MoS links** + nodes (ports, inland terminals, dry ports) to form a functional network
- Focus on **last mile infrastructure** to strategic nodes (ports and inland terminals)
- Mix of **hubs** and smaller **feeding terminals**
- Eminent role of **public administration**: supervise and repair system failures in green corridors performance
- **Steering mechanisms** adjusted to specific natural and socio-economic conditions of each corridor
- Question mark on the routing of the Motorway of the Baltic Sea on the ECOM maps
- Complementary short sea links needed in the central and northern part of the Baltic Sea!



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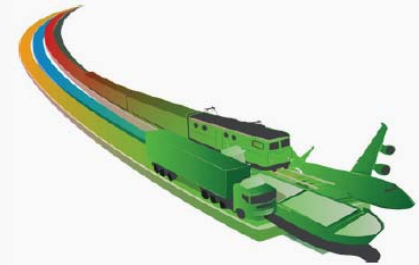


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Looming threats for **green corridors** in the BSR

- Cooperation with business indispensable to make this concept feasible - serious challenges detected!
 - Lack of **coordinated** policy support, leadership and stakeholder involvement across the BSR
 - Negative **response from the market** to possible new regulations
 - Low **popularity** of green transport solutions in new EU Member States and neighbouring countries
 - No efficient **education and promotion** measures on green services and products?
 - Need for **equal operation standards** in eastern and western parts of the BSR?
- A new **East-West divide** in the BSR?
 - Green solutions **too costly** for new EU Member States and Russia?
 - **Conventional infrastructure** preferred - to improve connectivity to European markets and increase competitiveness
 - **Insufficient** human and monetary **resources** for green transport solutions



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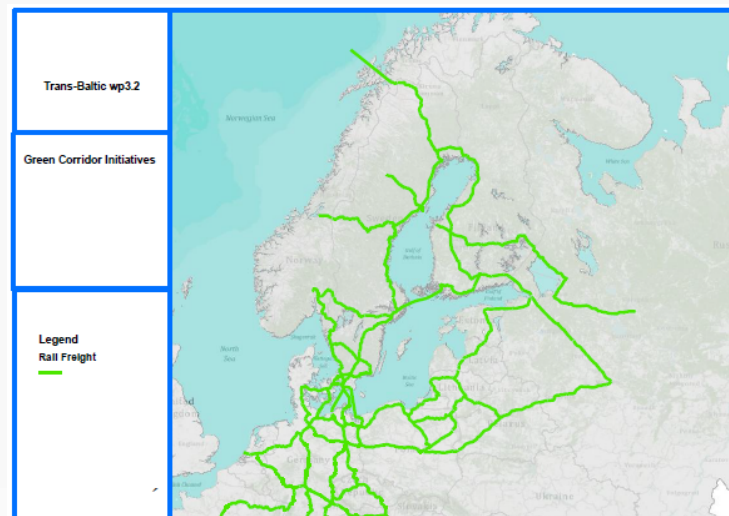
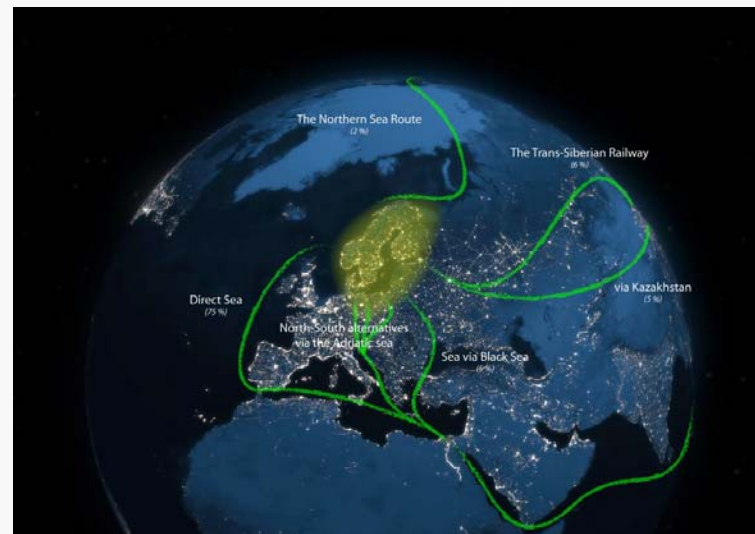
TransBaltic Green Scenario - components

Actual road and rail flows (2010) as a departure point

Projection of road and rail flows (2030) - baseline scenario of the Baltic Transport Outlook study (BTO)

Additional volumes via transcontinental routes

Changed speed/cost variables on the green network

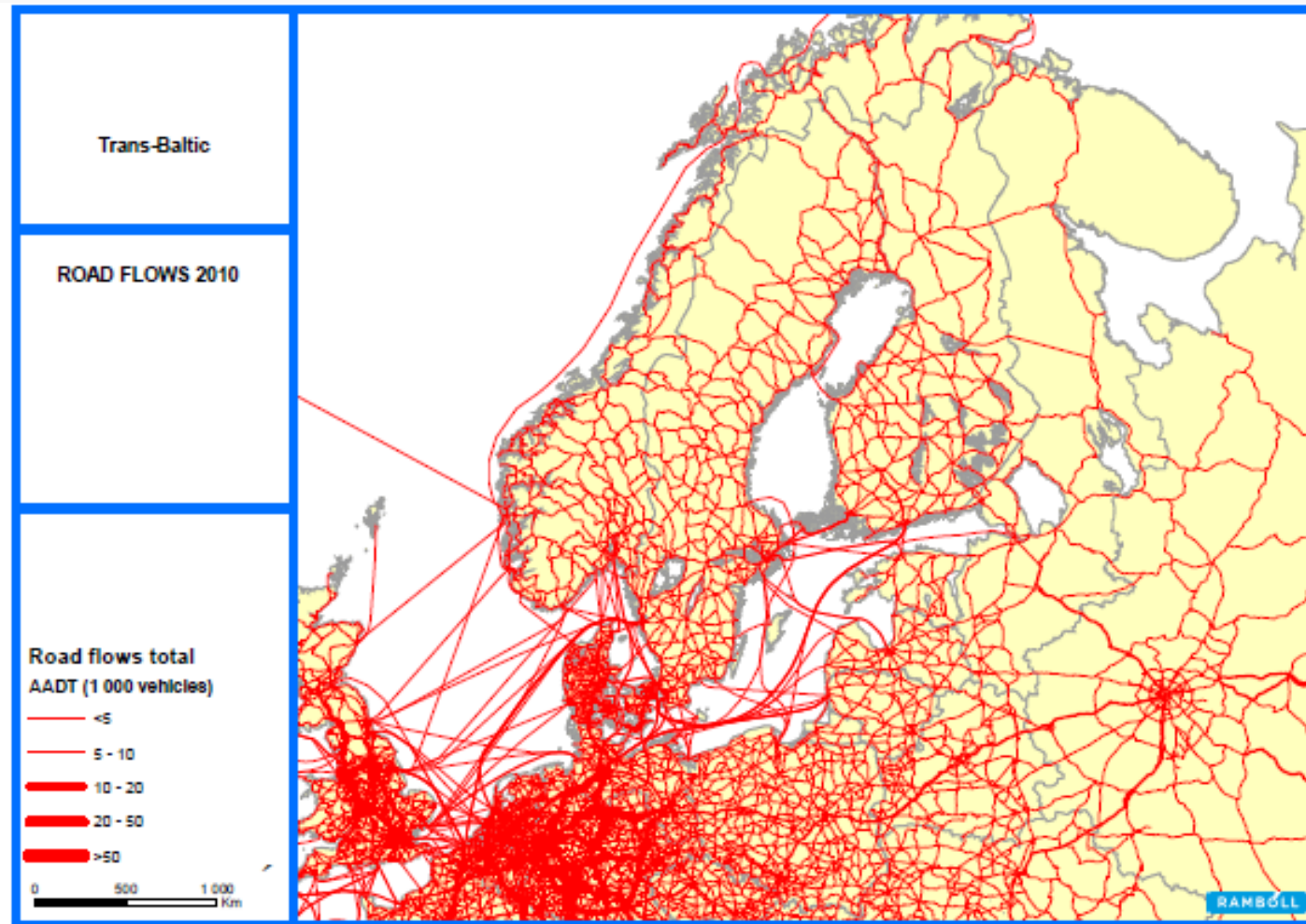


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Road flows 2010 (BTO)



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Rail flows 2010 (BTO)



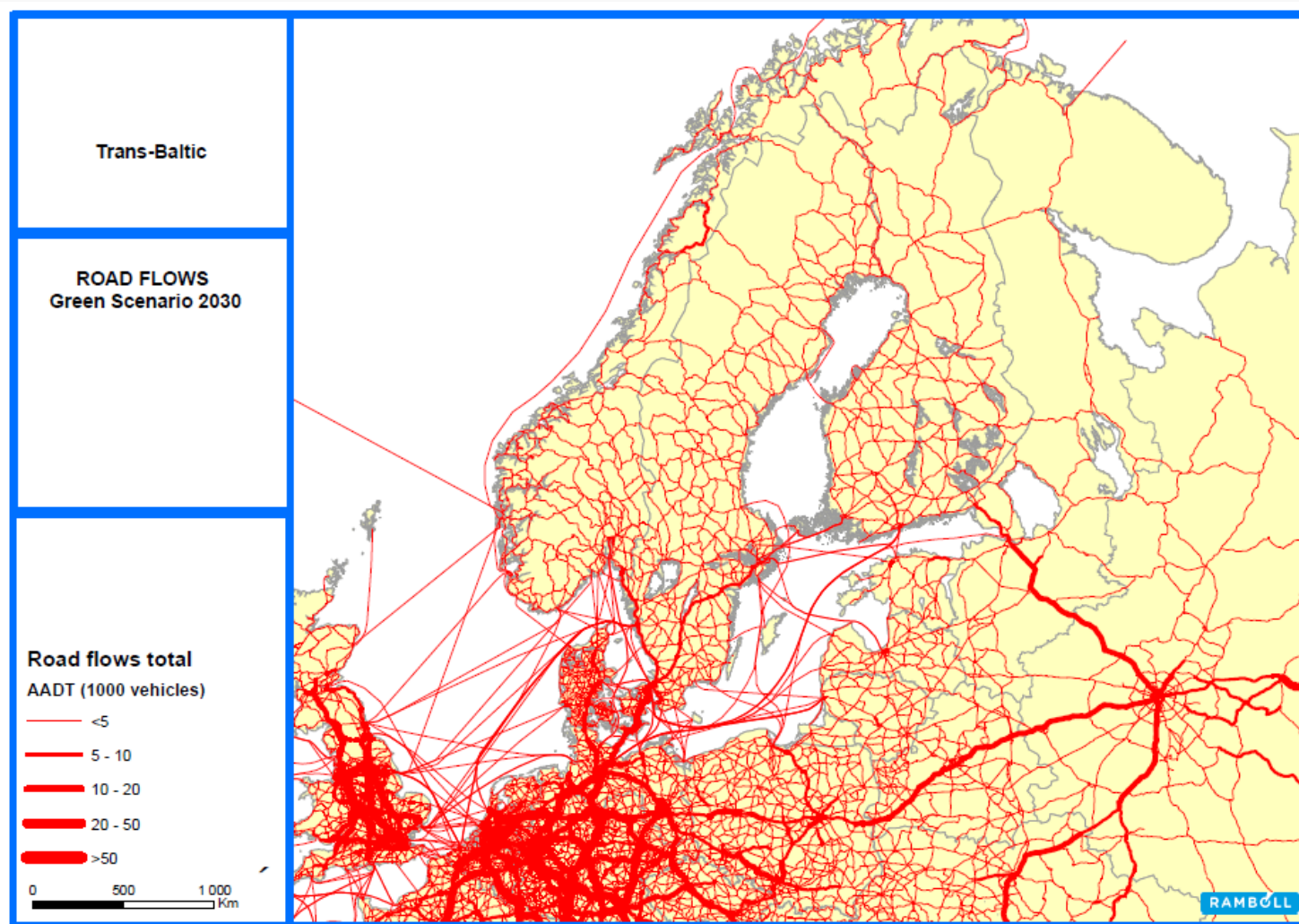
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Road flows 2030 (Green Scenario)



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Baltic Sea Region
Programme 2007-2013



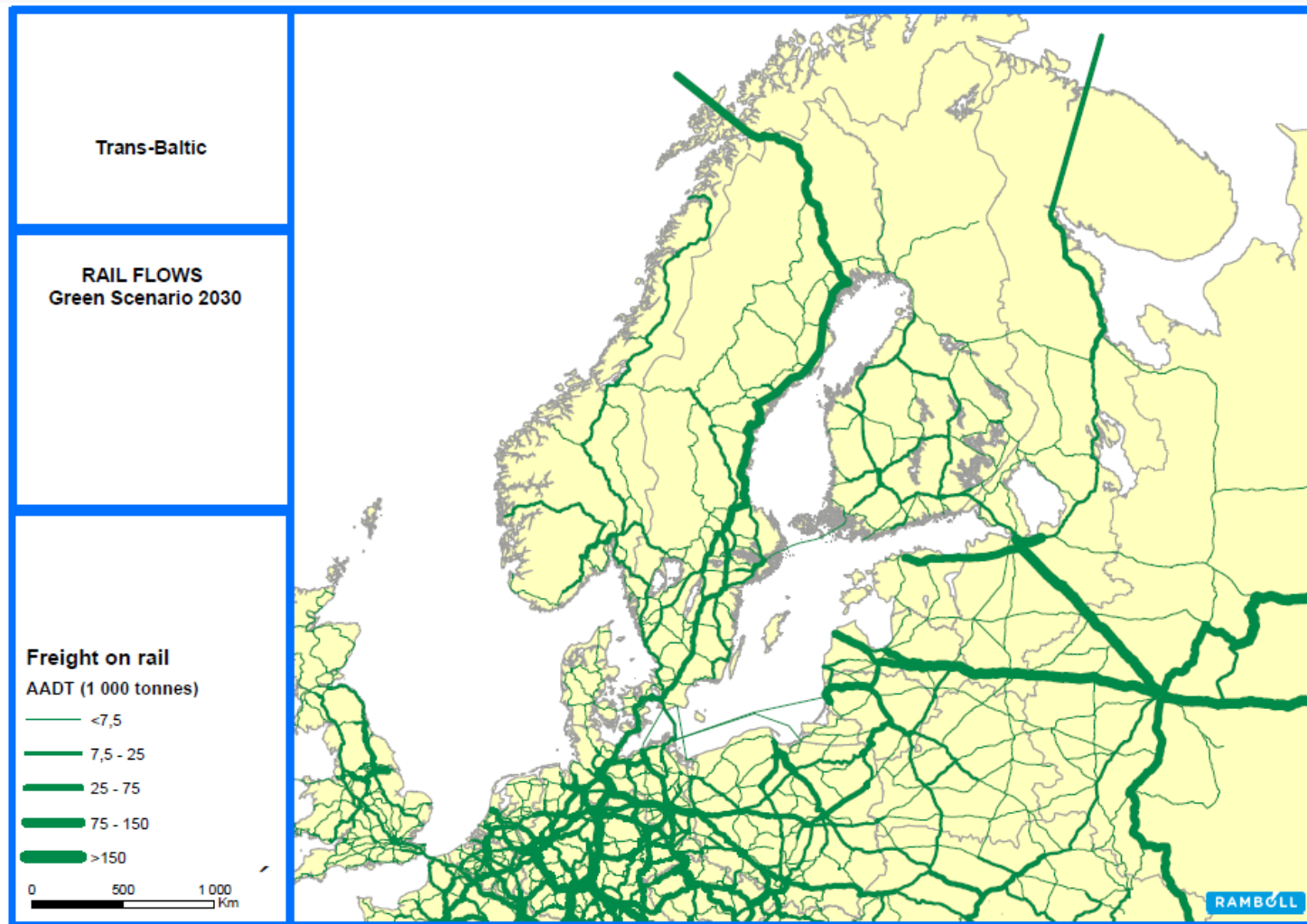
SKÅNE

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TransBaltic

Rail flows 2030 (Green Scenario)



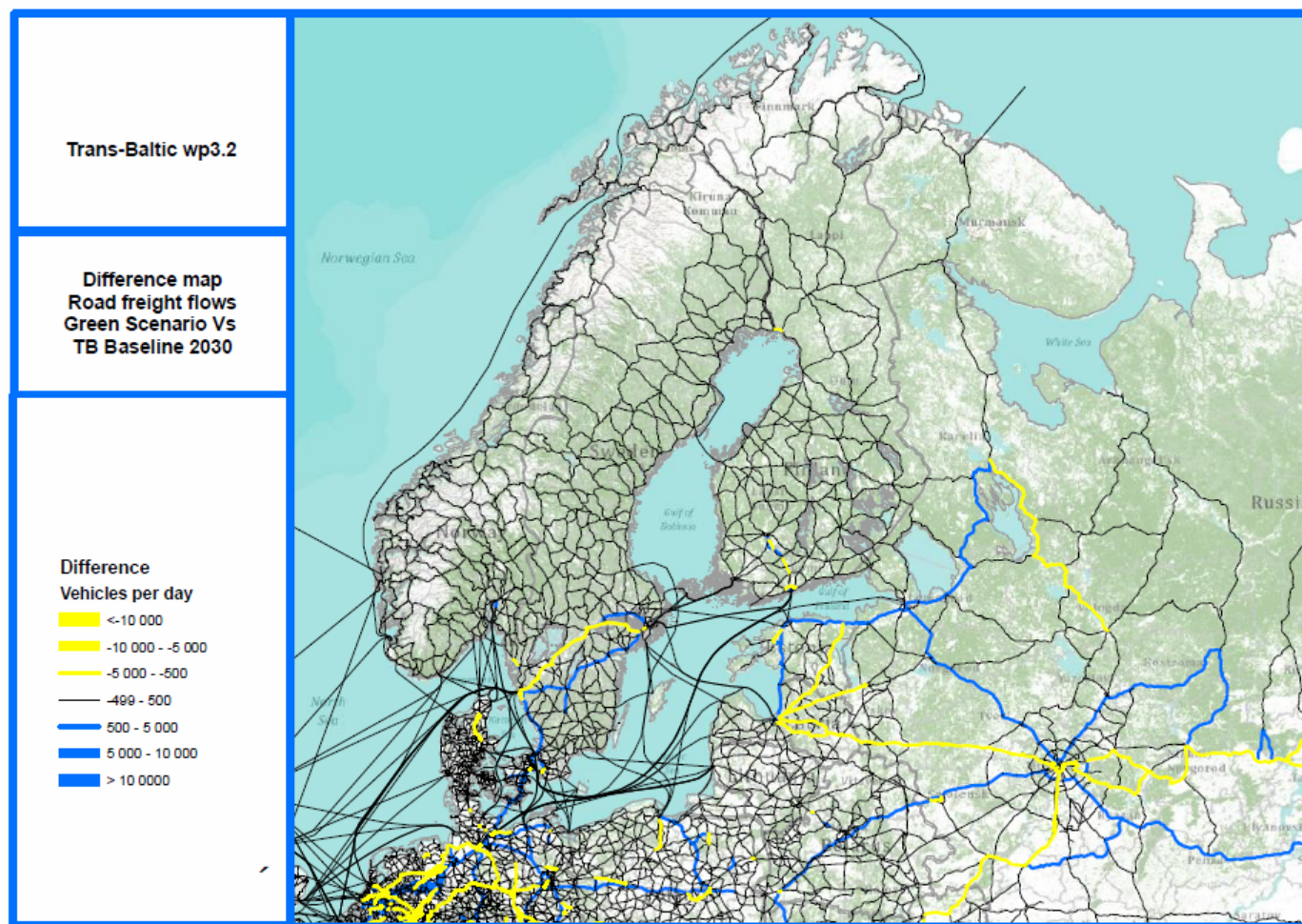
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Road flows 2030 (Green vs. Baseline)



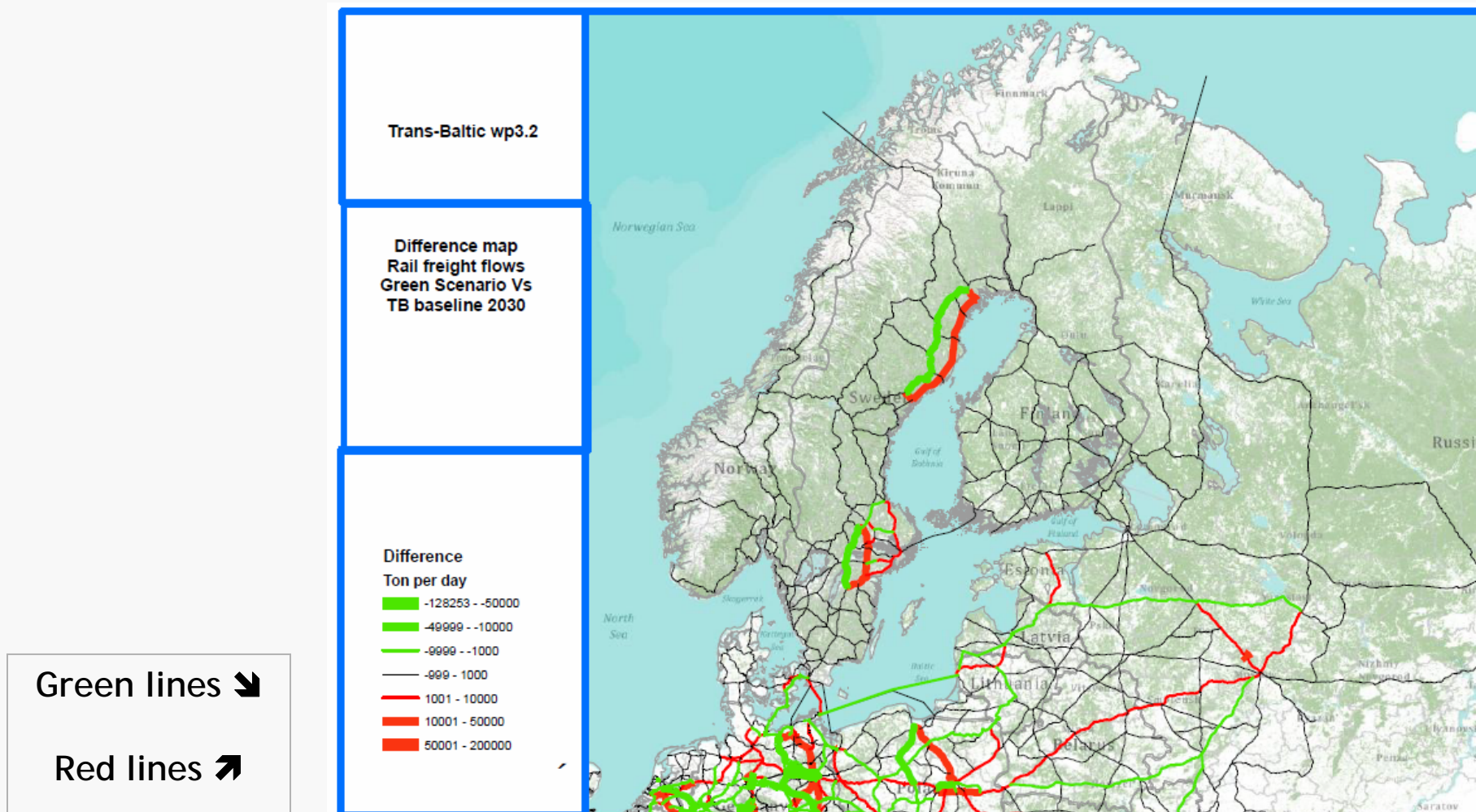
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Rail flows 2030 (Green vs. Baseline)



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Policy implications?



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Thank you for your attention!

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