



Towards an integrated transport system in the Baltic Sea Region

Baltic Sea Region in 2030. A new geography of freight flows. Are we prepared?

Project presentation at the
Stakeholders Debate, CPH,
29 March 2012



Project part-financed
by the European Union
(European Regional Development Fund)



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project manager

TransBaltic in a nutshell



- **Strategic project** in the Baltic Sea Region Programme 2007-2013 led by Region Skåne (Sweden)
- **51** organisations from **all BSR** countries involved: regional/national authorities, research institutes, transport and logistics associations, pan-Baltic networks
- Project listed in the **EU Baltic Sea Strategy** (cooperate for smarter transport - **green corridors**)
- Combination of **policy analyses** and **business cases** in transport and logistics
- **Macro-scale**: whole BSR & flow generating areas (Russia, China, India, Central Asia) + **corridor analyses**
- **Objective**: develop policy measures for an integrated multimodal transport system in the BSR
- Final **outcome**: Macroregional Transport Action Plan (ready in September 2012)



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Baltic Sea Region
Programme 2007-2013



SKÅNE



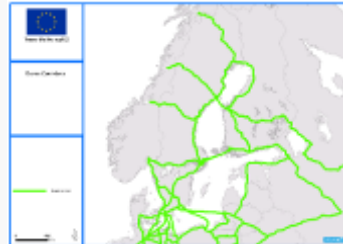
Towards an integrated transport system in the Baltic Sea Region

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
- East-West divide in transport greening policies
- 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 transport action plan (policy support for an integrated multimodal transport system in the Baltic Sea Region)

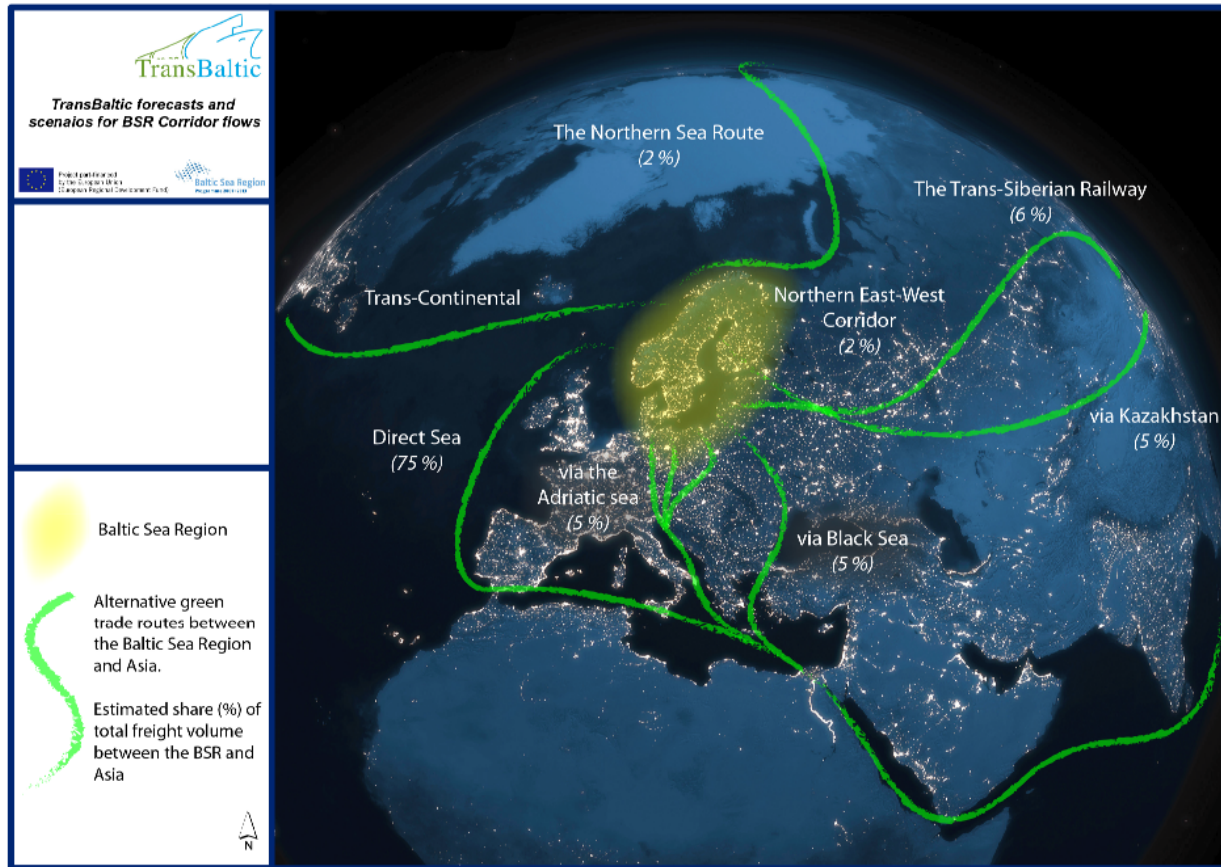


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If extra 120 million tones of Asia-BSR trade becomes a reality...

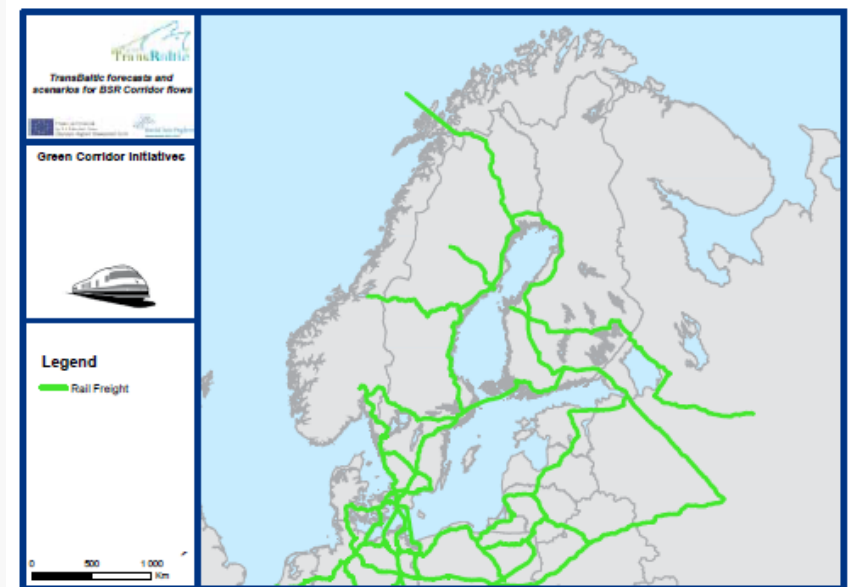
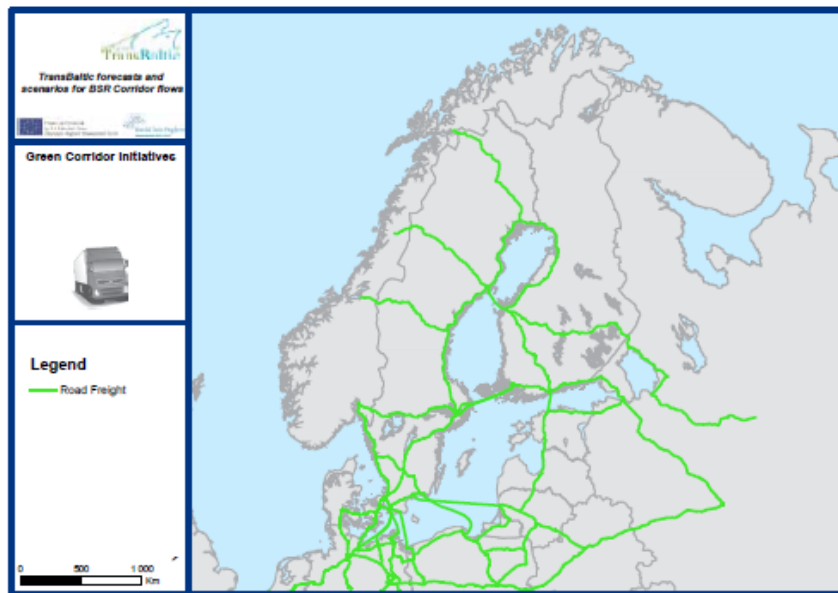


yielding additional pressure on some road, rail and short sea links



ALTERNATIVE TRANCONTINENTAL ROUTES ASIA-BSR
AND ESTIMATED DIVISION OF VOLUMES

If we make the transport networks in the BSR green and efficient...



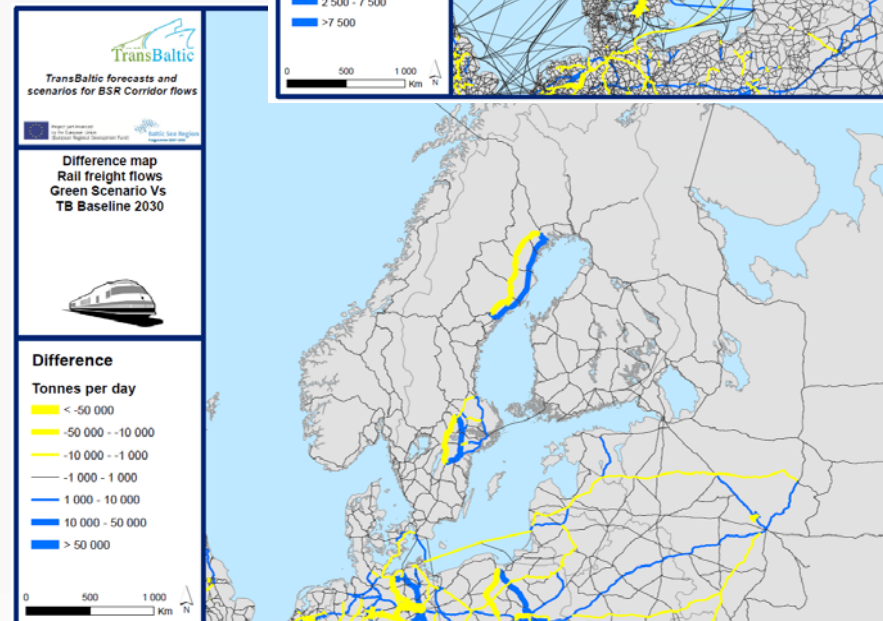
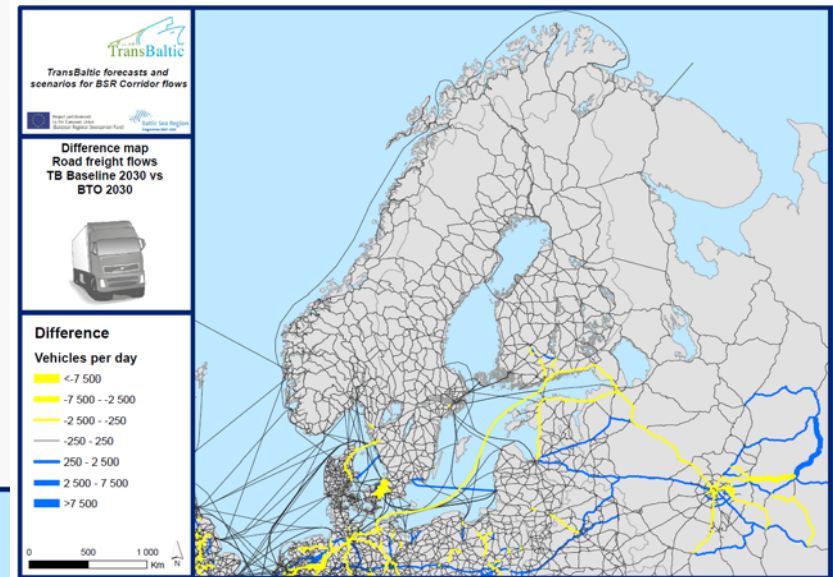
Changed speed/cost variables on displayed road & rail links

Road haulage cost
↘ 2 eurocent per vehicle/km

Rail link speed ↗ 30%

... they will become attractive freight corridors!

- **Capturing volumes** from other parts of the network (extra 7% of road volumes and 14% of rail volumes)
- **Road and rail ferries** gaining much!
- **Investment dilemma:** where to place efficient intermodal terminals?



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But the policies may matter a lot...

IMO Sulphur Regulation



Cost of traffic on the Baltic Sea ↗ 30%



Re-routed flows (N-S corridors gaining volumes):

- **via Black Sea 5 → 10%;**
- **via the Adriatic Sea 5 → 10%;**
- **conventional sea route 75% → 65%**

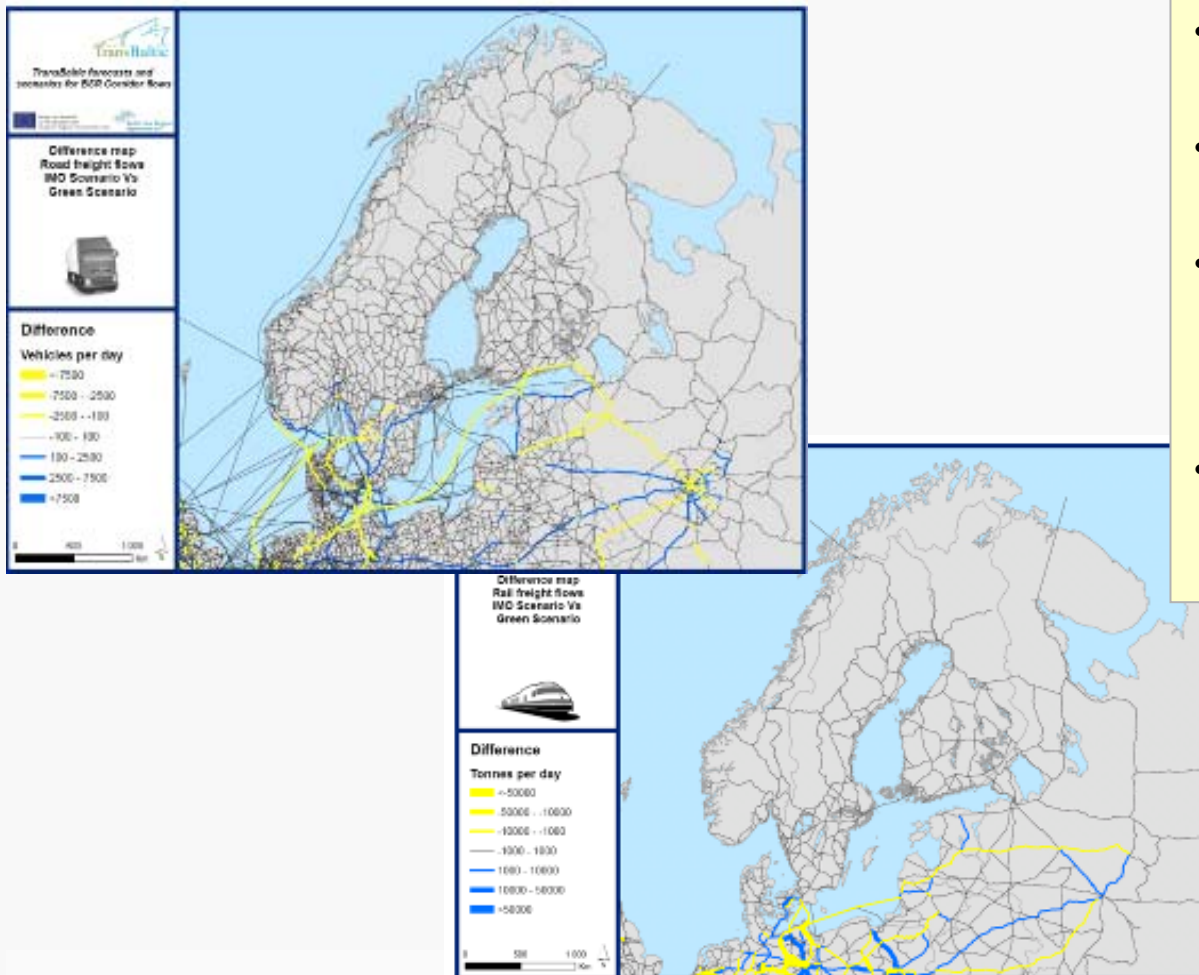
EU White Paper's Modal Change Goals by 2030



shift of 30% from road to: rail, short sea shipping and ferries on the green network

...and may result in a modal backshift...

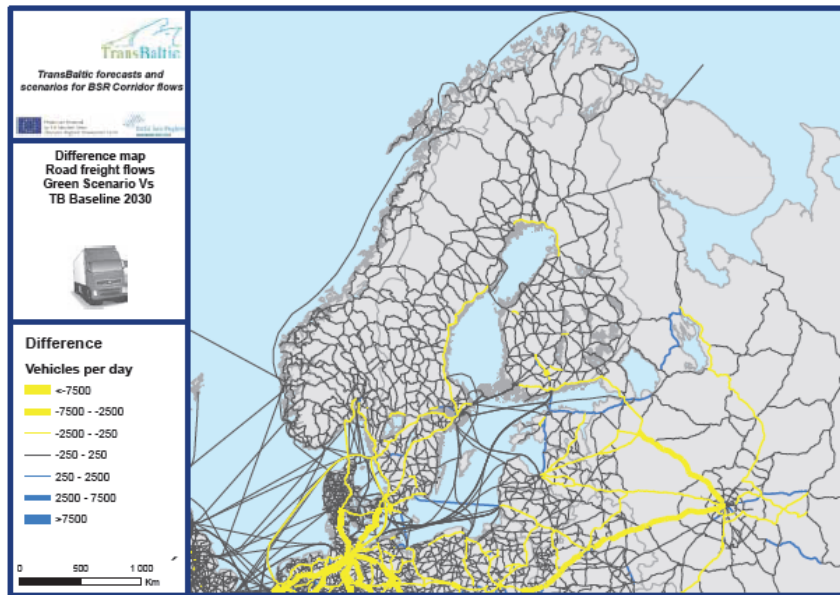
IMPACT OF THE IMO REGULATION ON THE GEOGRAPHY OF FLOWS



- Volumes on road ferries ↘ 14%, on rail ferries ↘ 50%
- Longer shipping routes in the BSR losing volumes
- Pressure on roads linking Moscow, St.Petersburg and Nordic capitals with western Europe
- Inflow of northbound volumes on rail corridors in S-BSR

...or promote rail solutions...

IMPACT OF THE EU TRANSPORT WHITE PAPER ON THE GEOGRAPHY OF FLOWS



- Volumes on the green network: road ↘ 30%, rail ↗ 34%
- Road and rail ferries ↗ ~ 40%
- Rail corridors serving metropolitan areas under pressure

All in all - some areas/components exposed to severe capacity pressure

Rail links in N-S connections

Road/rail ferries + intermodal terminals

Rail corridors to metropolitan areas

Barents Area

Cluster of ports in the Leningrad oblast

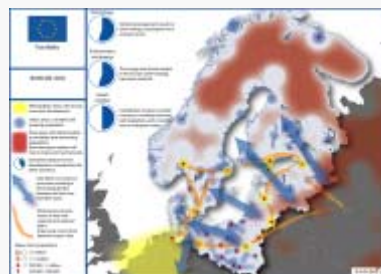
Ports of the three Baltic States

Gdansk-Gdynia-Kaliningrad belt

Öresund area/Danish straits



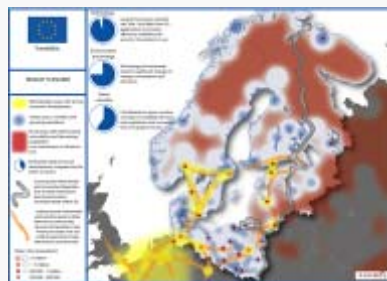
with policies faced with the
myriads of trajectories and
unpredictable black swan events



BUSINESS AS USUAL



GREEN



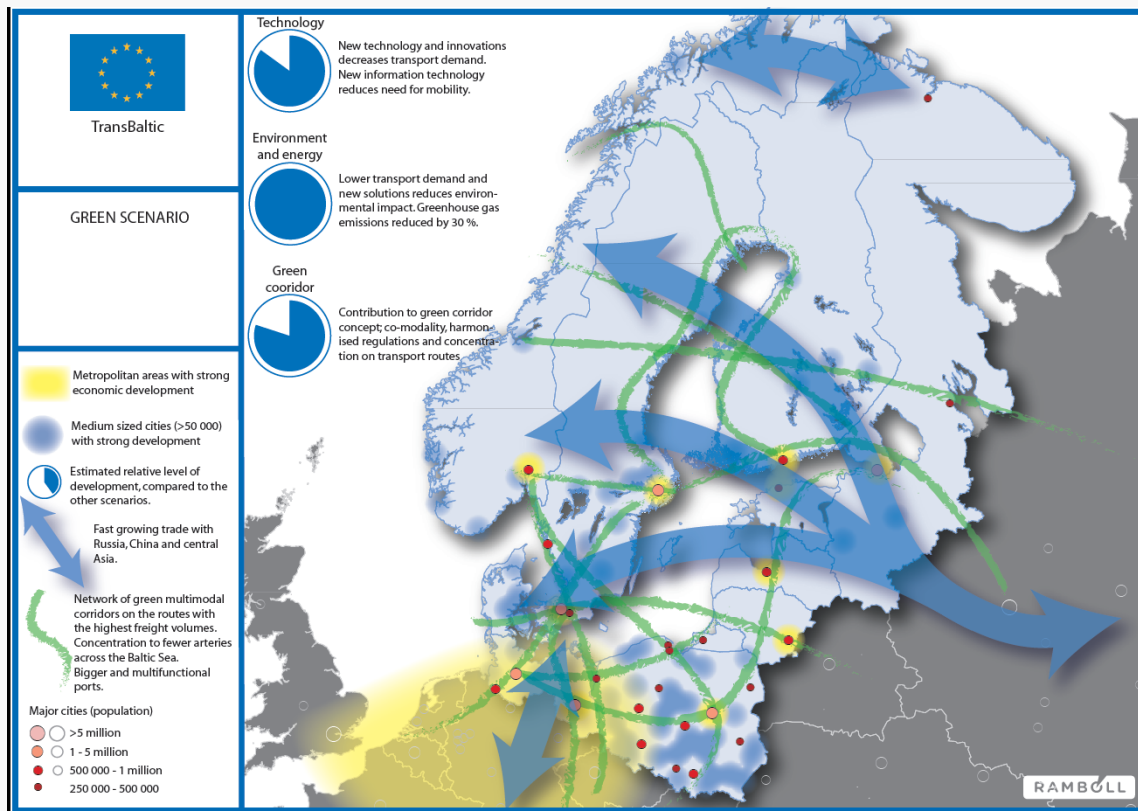
RIVALRY



COHESION

But can we go green and efficient?

THE GREEN SCENARIO AS ONE OF POSSIBLE TRAJECTORIES TILL 2030



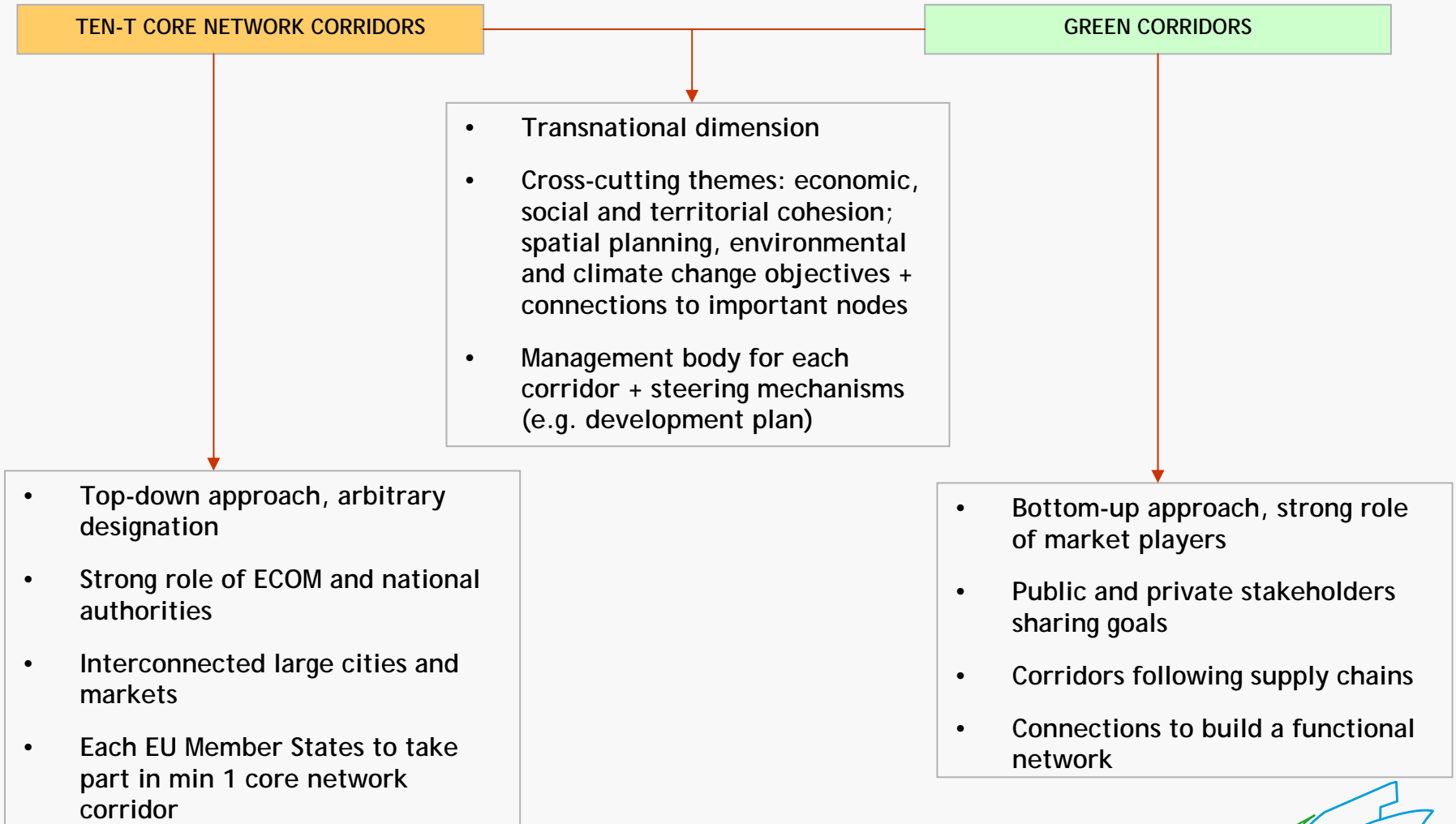
- Surge of **eco-consciousness** (e.g. higher demand for environmental friendly vehicles, locally produced goods and products with low environment impact)
- **Harmonisation** measures (e.g. carbon taxes, certification, product labelling of terminals and particular services, common cargo safety standards etc.) to balance business models with societal expectations
- Eminent role of **public administration**: supervise and repair system failures in corridors performance

Green transport corridors vs. EU transport policies

- White Paper on Transport 2011 - **freight corridors** to make the freight multimodality economically attractive for shippers in longer distances and to facilitate the modal shift
- Freight corridors with two attributes:
 - **green** - optimised energy use and emissions, and minimised environmental impacts
 - **efficient** - reliability, limited congestion and low operating and administrative costs



Similarities and dissimilarities



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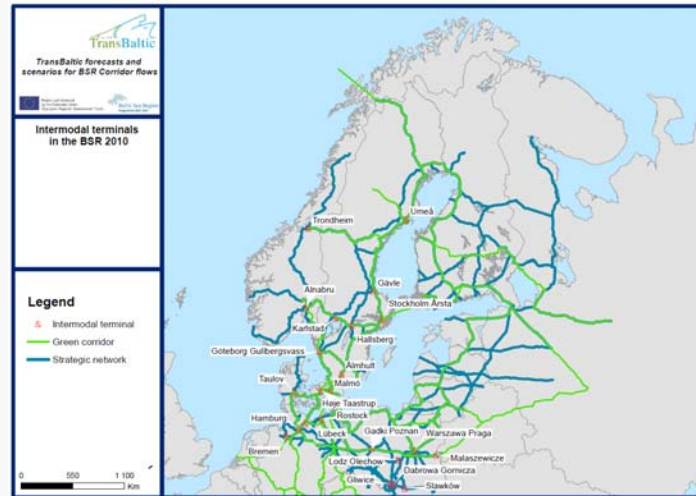


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How to address the future of intermodal terminals in respective policies ?

HIGHLIGHTS

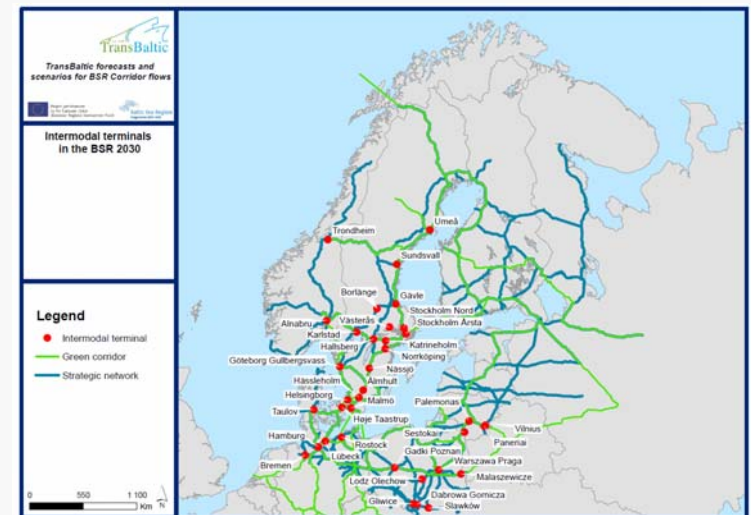
- TEN-T links + MoS links + nodes (ports, inland terminals, dry ports) to form a functional network
- Consolidation and concentration processes
- System of hubs and smaller feeding terminals
- Unrestricted access
- Coordinated policy support?
- Reliable data?



2010



2030



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Baltic Sea Region
Programme 2007-2013



TransBaltic

Towards an integrated transport system in the Baltic Sea Region



Thank you for your attention!

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