TransBaltic

Towards an integrated transport system in the Baltic Sea Region

Main driving forces for future cargo flows in the BSR

Presentation at the TransBaltic-BPO debate, Helsinki, 15 June 2012

Wiktor Szydarowski
project manager

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

Baltic Sea Region Programme 2007–2013

SKÅNE

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)

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

Baltic Sea Region Programme 2007-2013

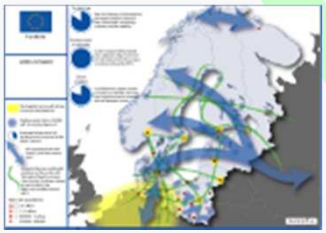
SKÅNE

TransBaltic

Towards an integrated transport system in the Baltic Sea Region

The TransBaltic cuisine...

Best practice inventories, results of previous initiatives



Transport flow scenarios 2030

- BASELINE
- COHESION
- RIVALRY
- GREEN

Green network analyses (links & terminals 2030)

Impact of transcontinental flows

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)

GREEN CORRIDOR CONCEPT

Corridor investigation, case studies

Input from the allied projects (umbrella)

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

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

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

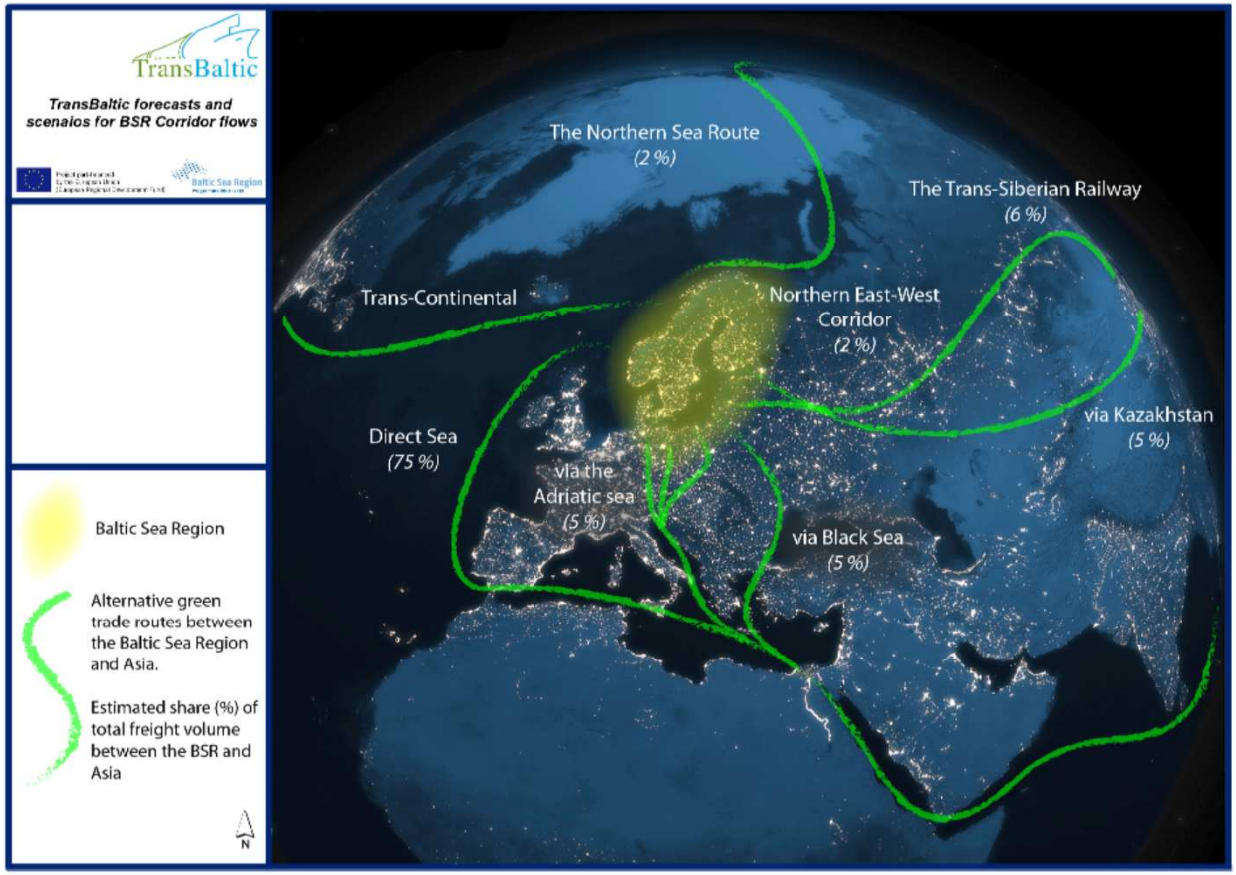
Baltic Sea Region Programme 2007-2013

SKÅNE

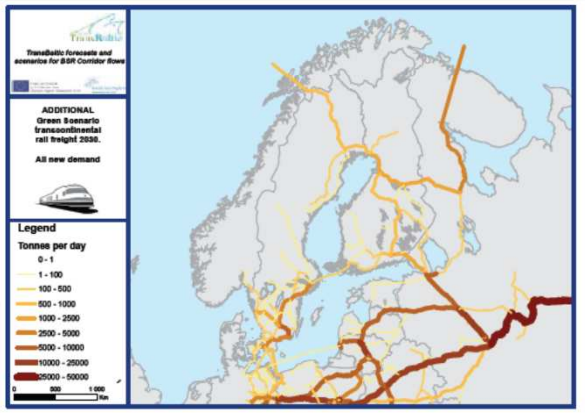
TransBaltic

Towards an integrated transport system in the Baltic Sea Region

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

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

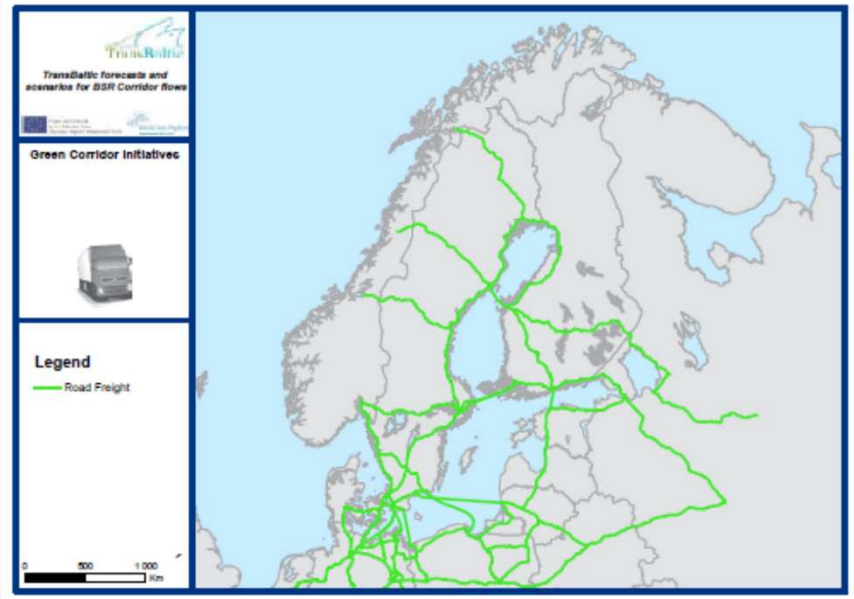
Baltic Sea Region Programme 2007-2013

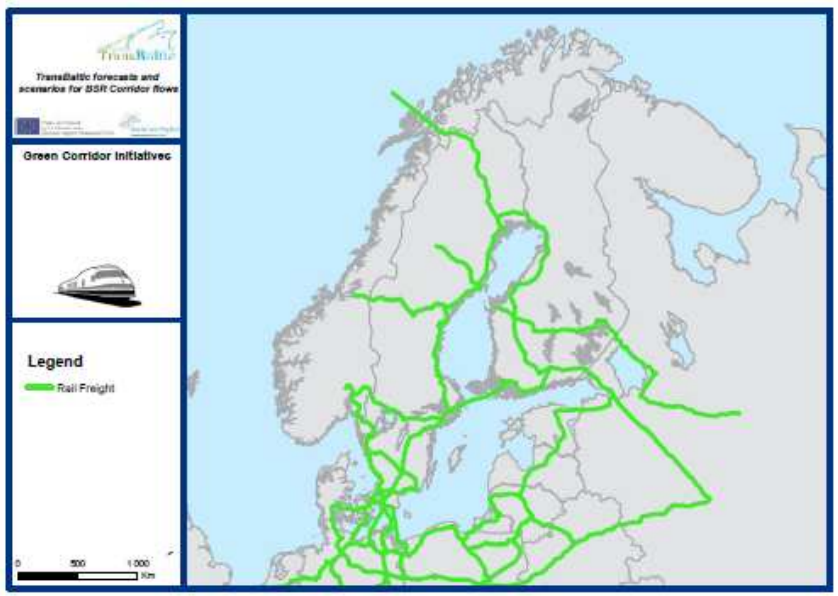
SKANE

TransBaltic

Towards an integrated transport system in the Baltic Sea Region

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%

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

Baltic Sea Region Programme 2007–2013

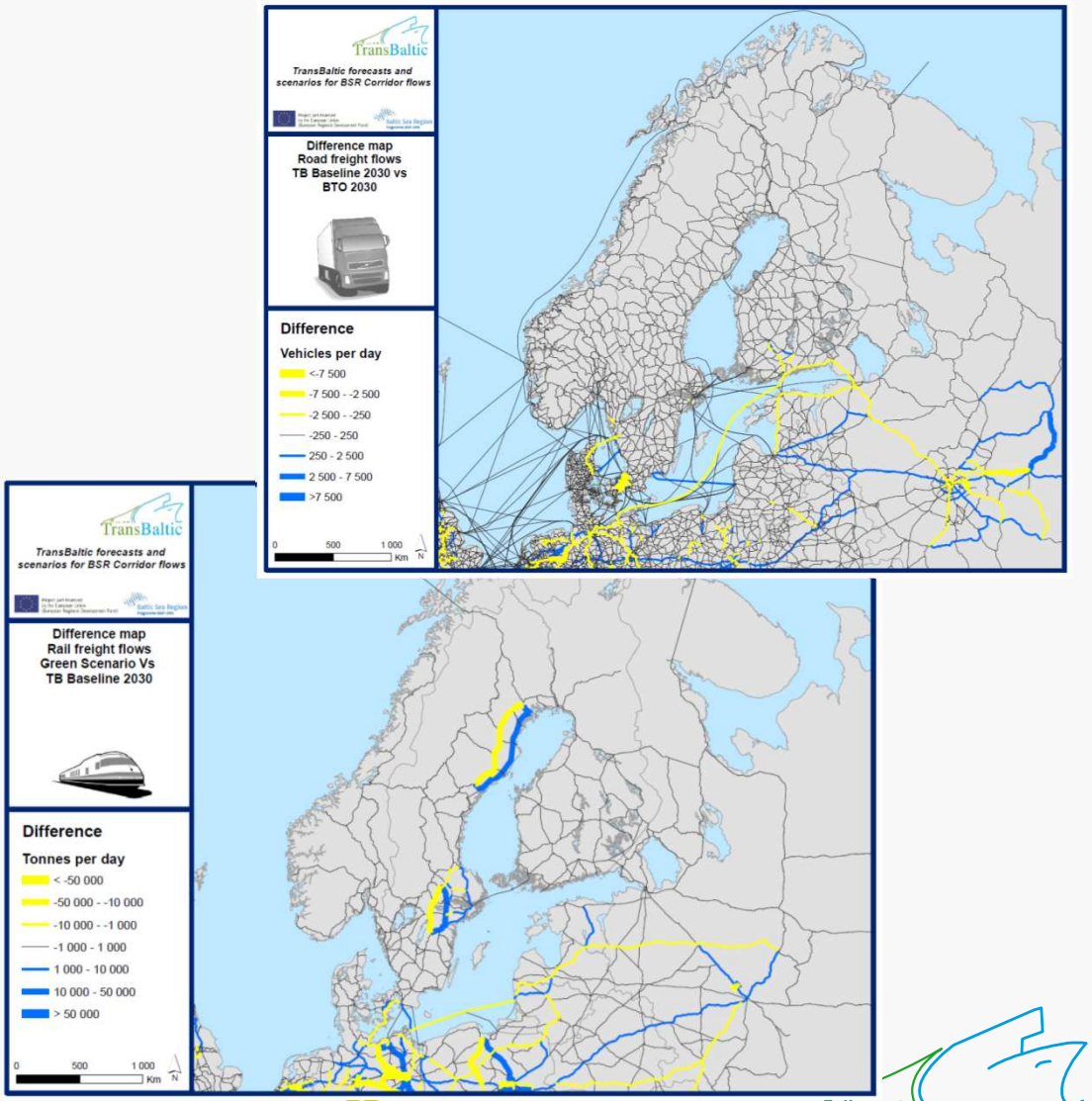
SKÅNE

TransBaltic

Towards an integrated transport system in the Baltic Sea Region

… 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?



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

Baltic Sea Region Programme 2007–2013

SKANE

TransBaltic

Towards an integrated transport system in the Baltic Sea Region

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

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

Baltic Sea Region Programme 2007-2013

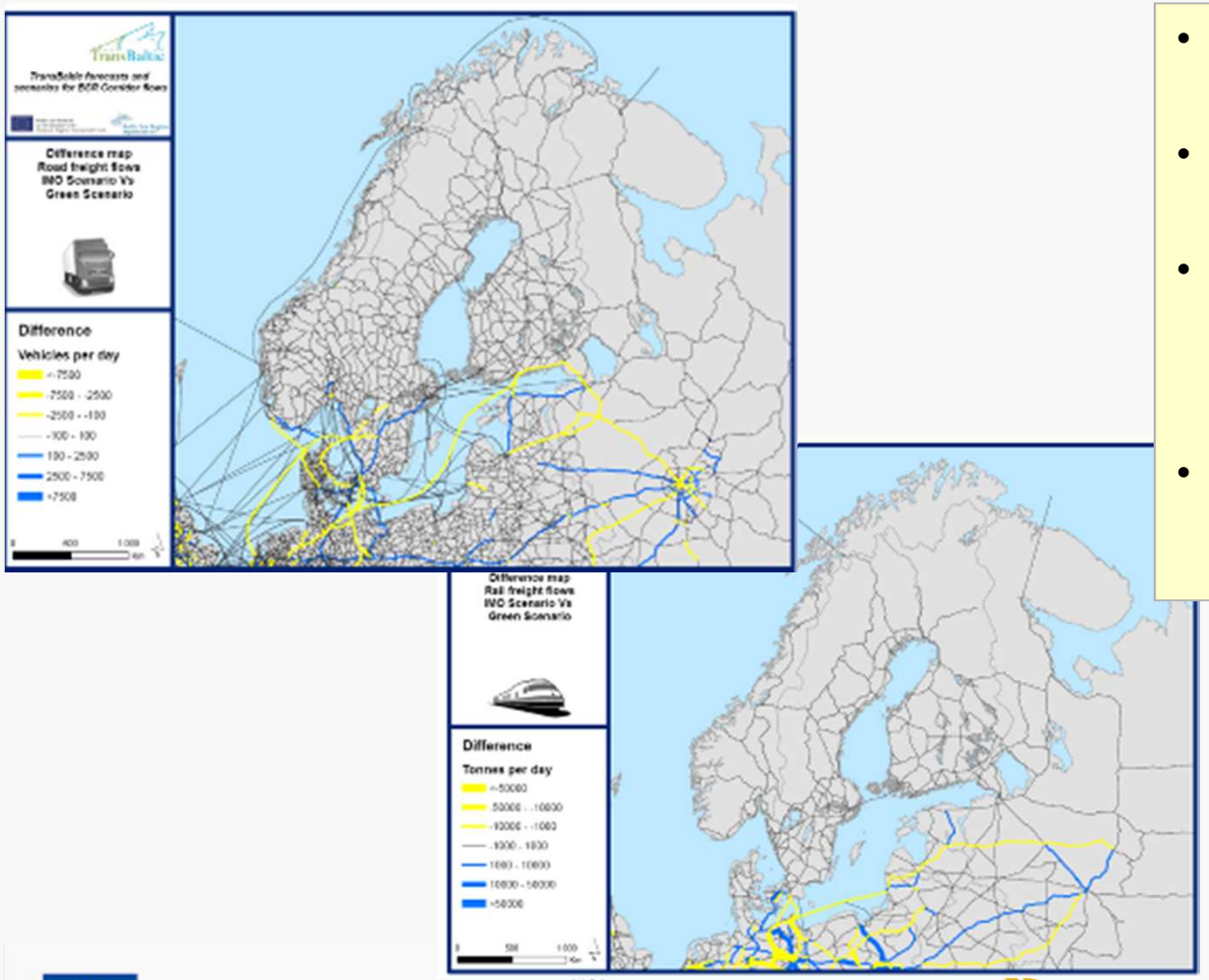
SKÅNE

TransBaltic

Towards an integrated transport system in the Baltic Sea Region

...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/road corridors in S-BSR

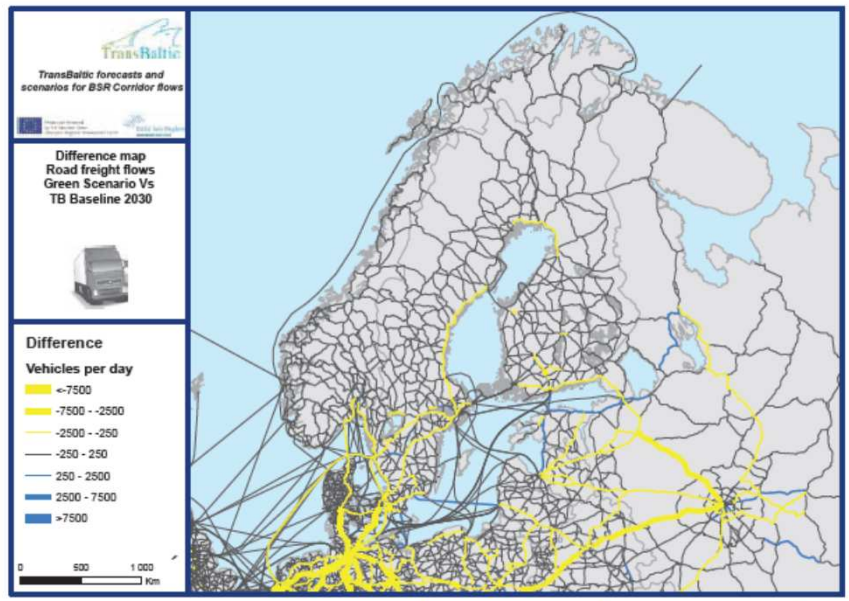
Project part-financed by the European Union (European Regional Development Fund)

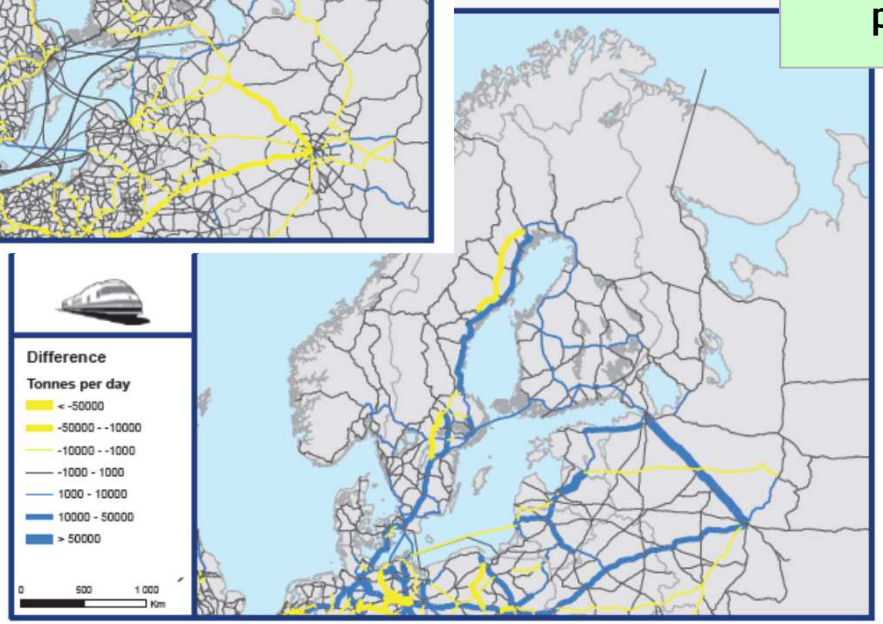
Baltic Sea Region Programme 2007-2013

SKANE

...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

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

Baltic Sea Region Programme 2007-2013

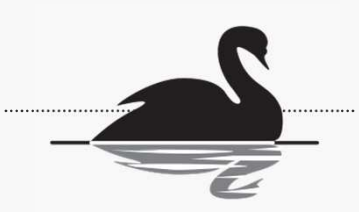
SKANE

TransBaltic

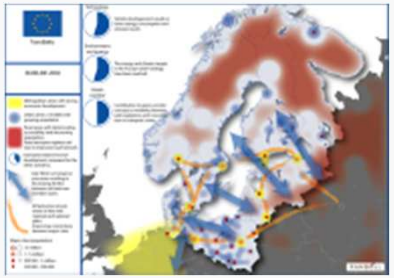
Towards an integrated transport system in the Baltic Sea Region

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

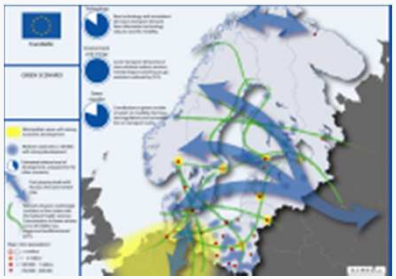
- Rail/road links in N-S connections
- Road/rail ferries + intermodal terminals
- Rail corridors to metropolitan areas
- Barents Area
- Cluster of ports in the Leningrad oblast
- Ports of the three Baltic States
- Gdansk-Gdynia-Kaliningrad belt
- Öresund area/Danish straits



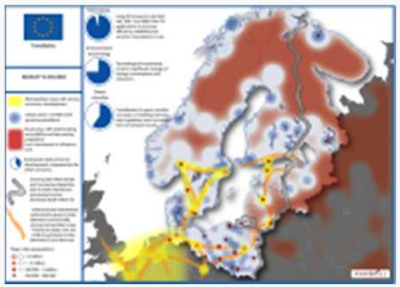
with policies faced with the myriads of trajectories and unpredictable black swan events



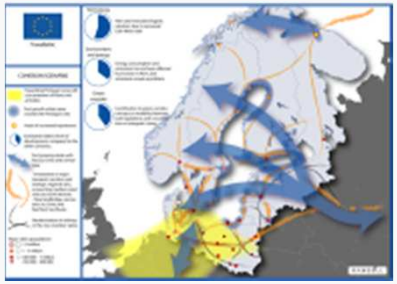
BUSINESS AS USUAL



GREEN



RIVALRY



COHESION

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

Baltic Sea Region Programme 2007-2013

SKÅNE

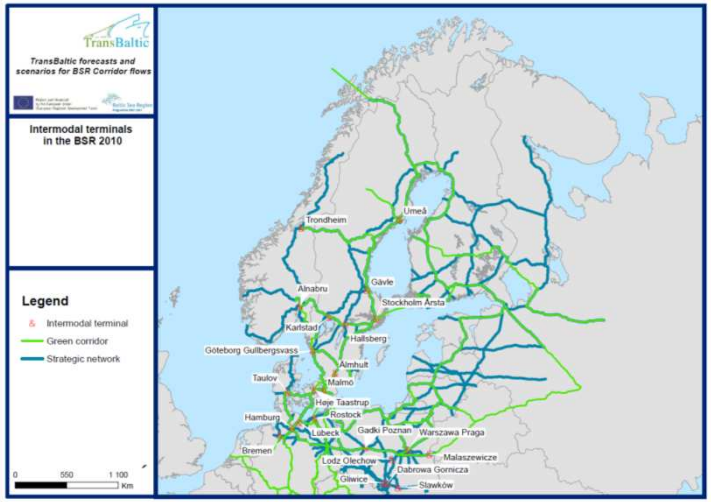
TransBaltic

Towards an integrated transport system in the Baltic Sea Region

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

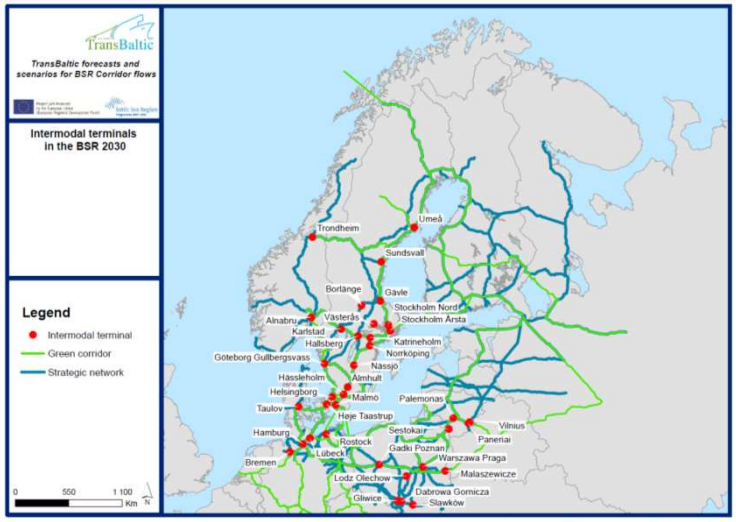
HIGHLIGHTS

- 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



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

Baltic Sea Region Programme 2007-2013

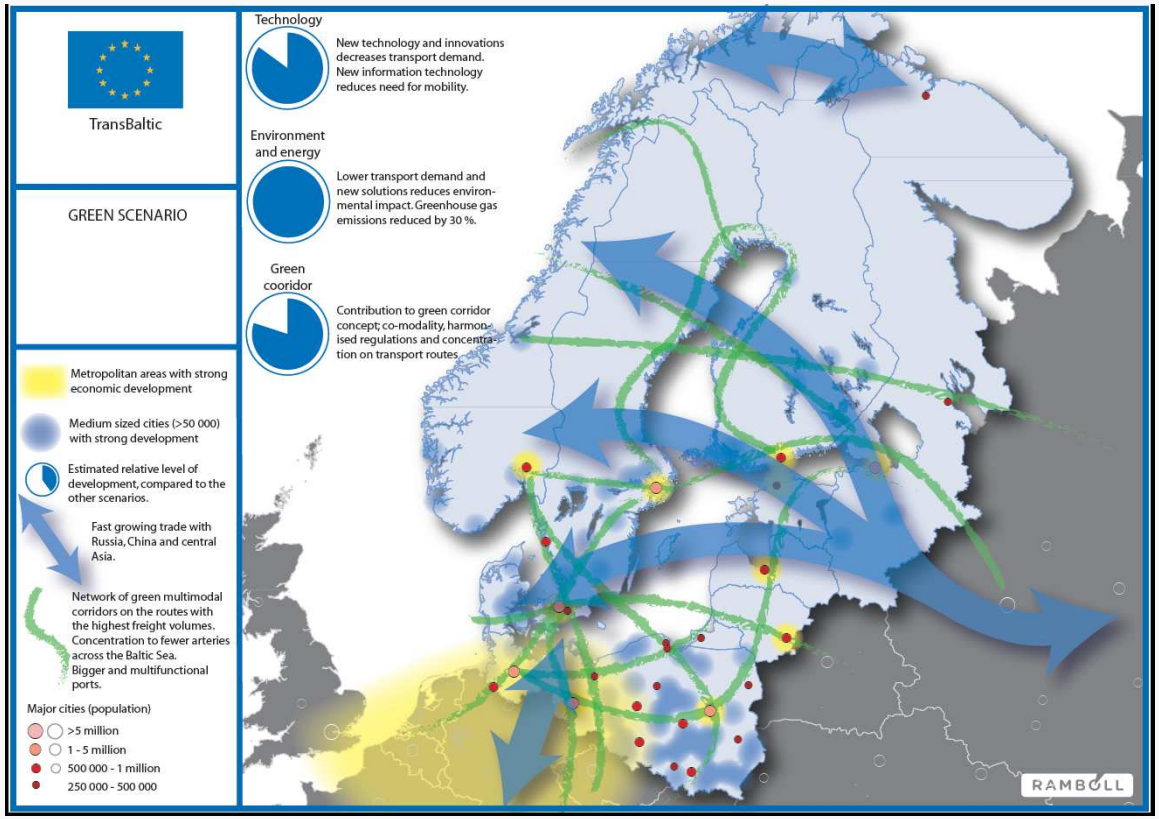
SKÅNE

TransBaltic

Towards an integrated transport system in the Baltic Sea Region

Pre-requisites for going 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

Project part-financed by the European Union (European Regional Development Fund)
Baltic Sea Region Programme 2007-2013
SKANE
TransBaltic
Towards an integrated transport system in the Baltic Sea Region

Challenges for the green scenario

- Insufficient monetary and human resources
- Preference to investments in conventional infrastructure
- Insufficient intermodal transport volumes along a corridor
- Lack of rewarding mechanisms for developing and using green infrastructure
- Lack of coordinated policy approach (harmonisation measures, level-playing field for all market actors)
- Problems with data sharing and access (ICT services, statistics)
- Low involvement of civil society (green transport solutions interpreted as additional cost)
- Inadequate competence of transport and logistics staff
- No efficient education and promotion measures on green services and products

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

Baltic Sea Region Programme 2007-2013

SKANE

TransBaltic

Towards an integrated transport system in the Baltic Sea Region

Thank you for your attention!

Wiktor Szydarowski, Ph.D.
Project manager
wiktor@szydarowski.com

www.transbaltic.eu

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

Baltic Sea Region
Programme 2007-2013

SKÅNE

TransBaltic
Towards an integrated transport system in the Baltic Sea Region