

# Challenges and solutions for transport in the Danube region

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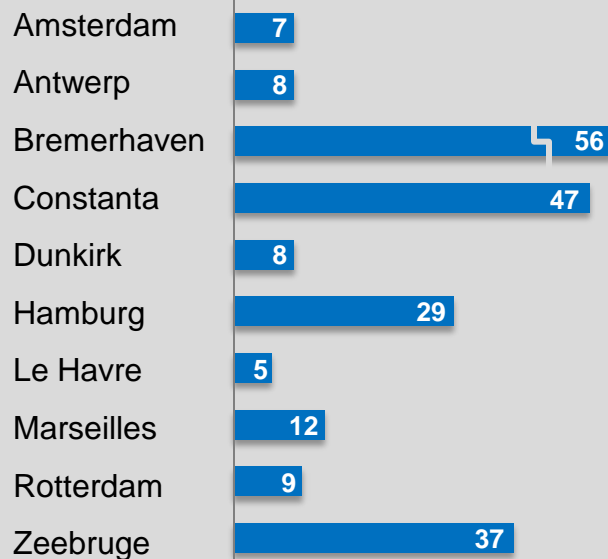
## Business models and solutions for the Adriatic – Danube multimodal platform

Ljubljana, November 2012

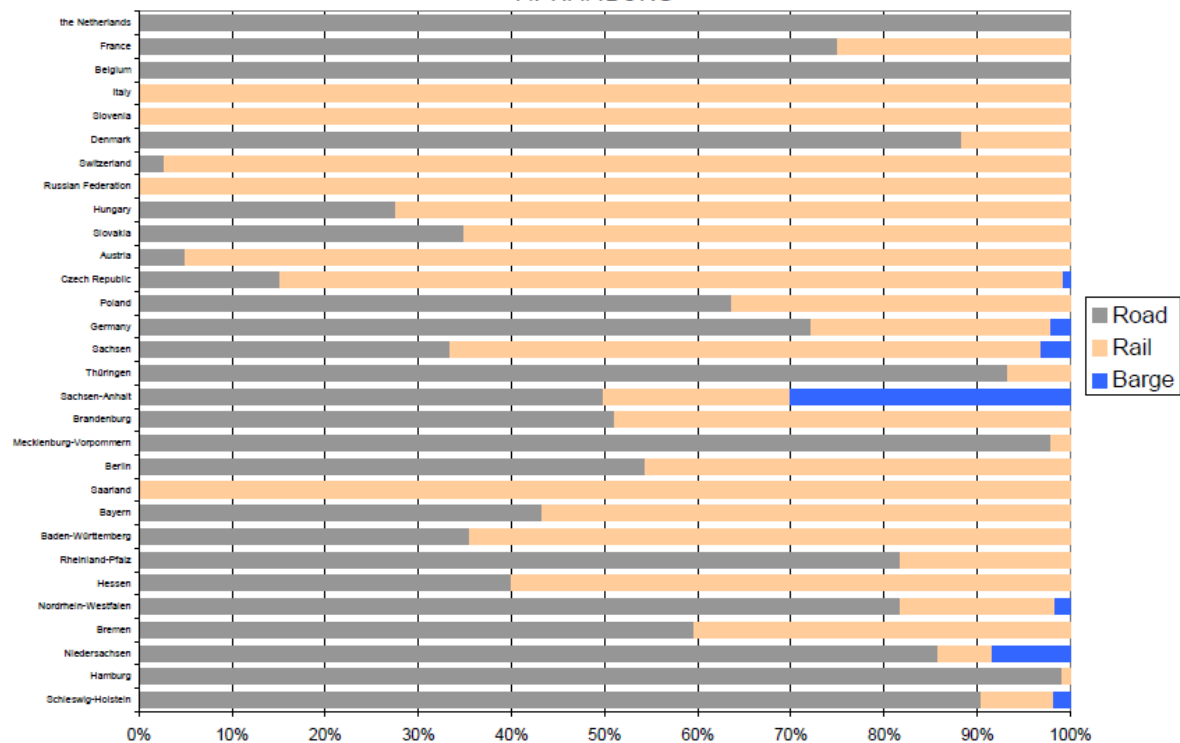
# Rail transport – Does it matter?



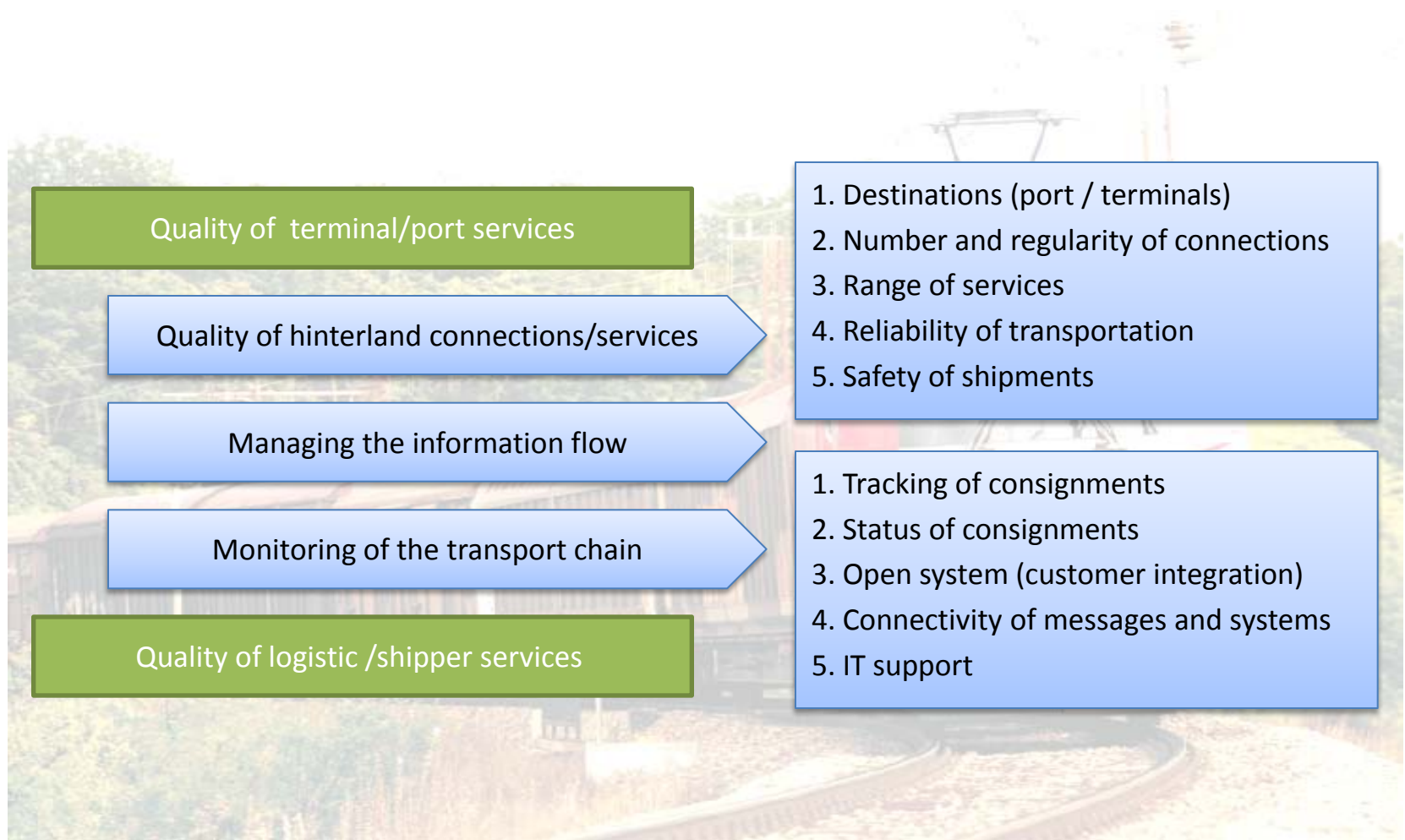
## CNT Modal split (Rail transport in %)



## A. HAMBURG



# Logistic demand & competence

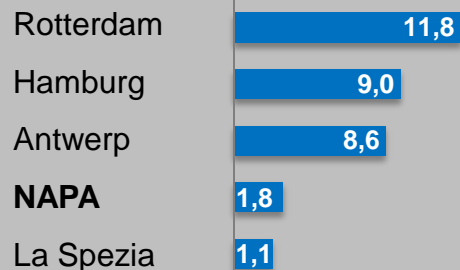


# North Adriatic Ports example



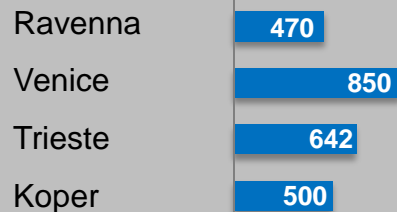
## NAPA Throughput

(in Mio TEUs, 2011)



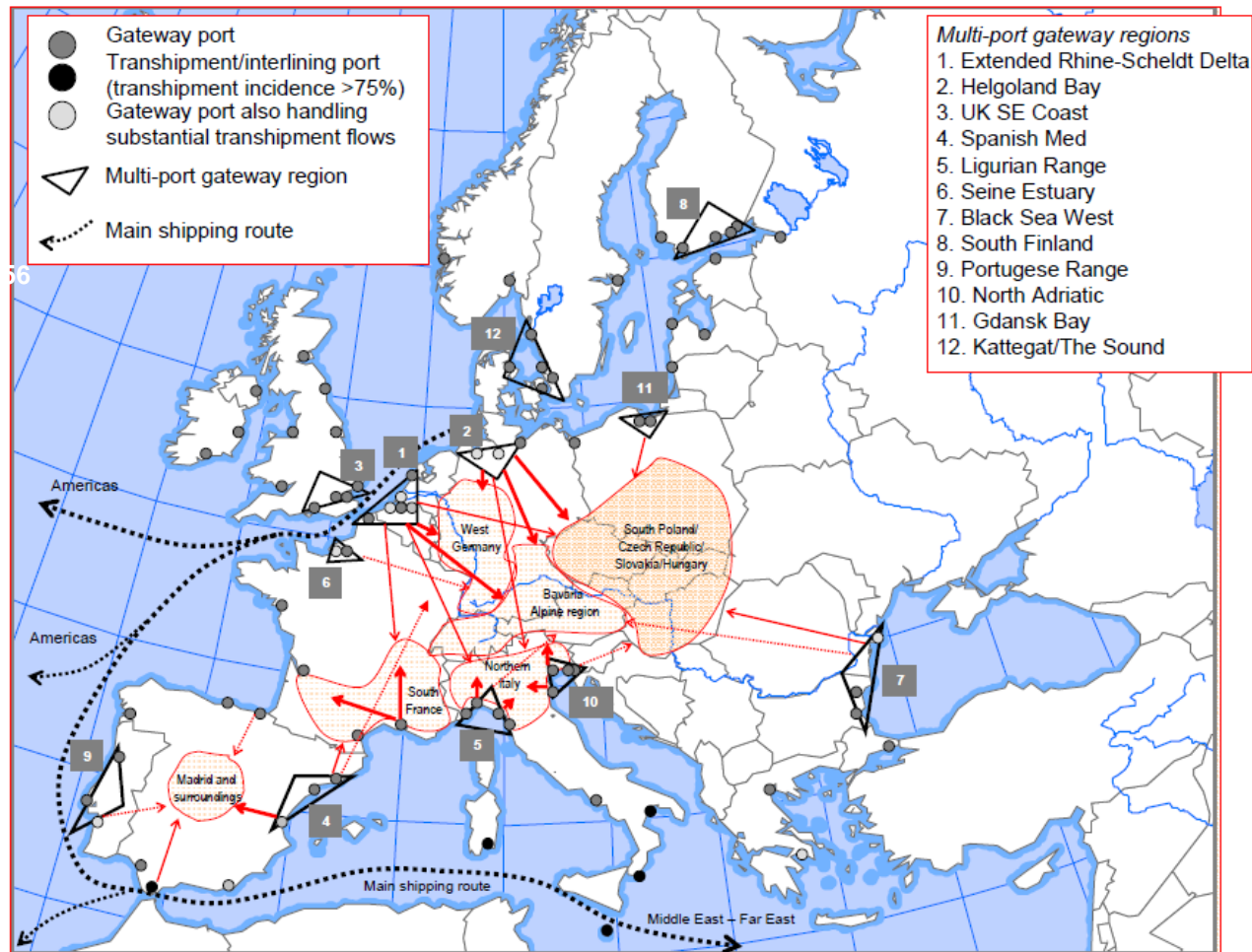
## NAPA Investments planned

(in Mio EUR)



## NAPA

North Adriatic Ports Association  
Venice, Ravenna, Trieste, Koper



# NAPA & The “Blue Banana”



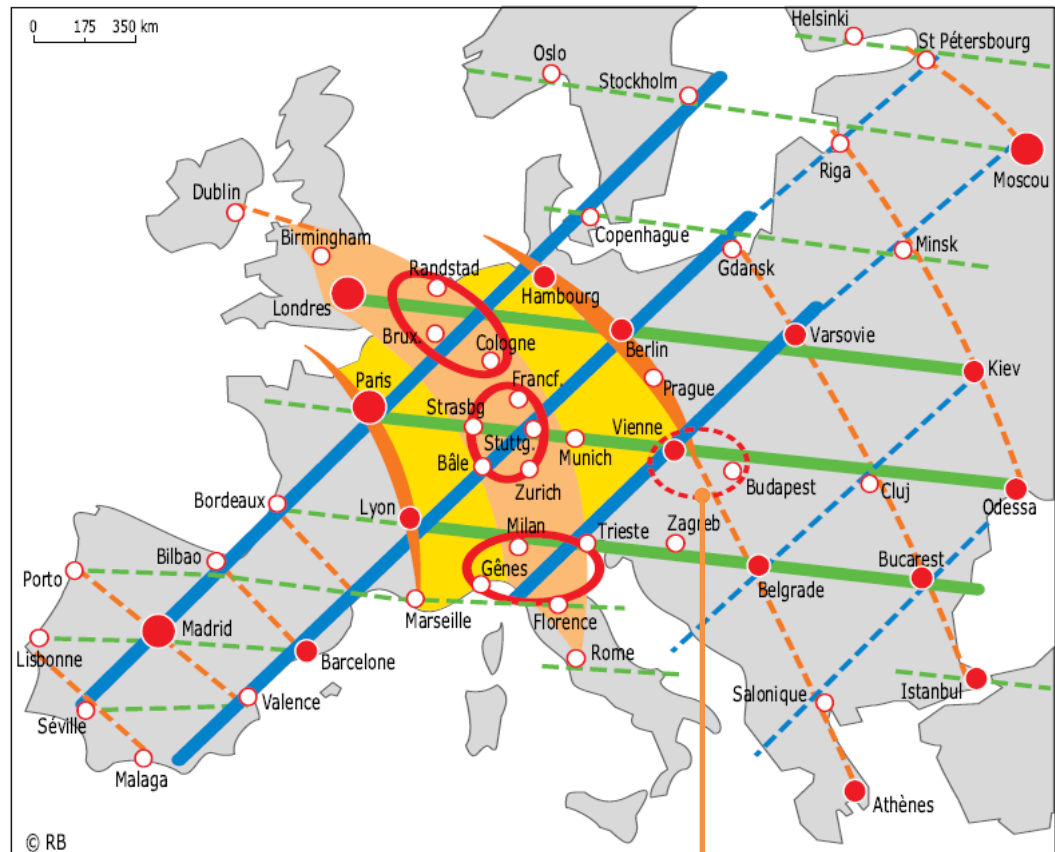
## The “Blue Banana”

- London-Benelux-Rhine-Milan
- Economic zone with greatest development potential in Europe (highest population density and industrial concentrations)

## The rise of new giants

- The “Blue Banana” might lose its dominant position – EU expansion towards East
- New growth zones emerging
  - “**Sunbelt**” Milano – Valencia
  - “**Yellow Banana**” Paris-Berlin-Warsaw
- Shift of the center from Benelux to Germany

Source: R. Brunet, 2002



**New development possibilities  
in the Adriatic and Danube region**

# NAPA Region

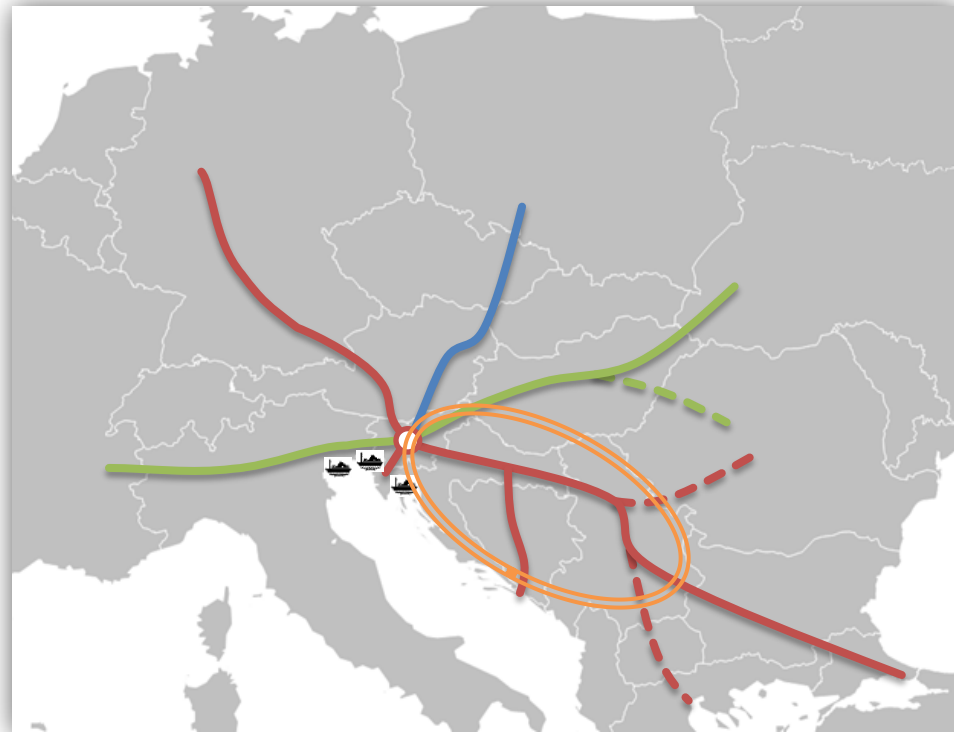


**Corridor V**  
France/Italy – Hungary/Ukraine  
extension Romania

**Corridor X**  
Germany – Turkey  
extension Romania  
extension Macedonia/Greece

**Baltic Axis**  
Poland – Slovenia/Koper

**Regional Logistic Platform**



# NAPA hinterland connections



## NAPA Maritime market excellence

• Liquid Bulk	Trieste	<b>CTN CAPACITY</b> <b>-2011-</b> 1,500 mio TEU <b>-2015/20-</b> 3,800 mio TEU
• Containers	Venice, Trieste, Koper, Ravenna	
• Dry Bulk	Ravenna	
• Ro-Ro	Ravenna	
• General Cargo	Venice	
• Car Carriers	Koper	
• Timber	Koper	

## NAPA Logistic descriptives

- Central entry point to Central and Eastern Europe
- Geographical proximity of port areas (100 km range)
- Shorter hinterland connections (700km Germany/Hungary)
- Shorter maritime connection (5 days Egypt/Benelux)
- Direct railway links to Austria, Germany, Czech Republic, Poland, Hungary, Slovakia, Ukraine and Russia (in development)



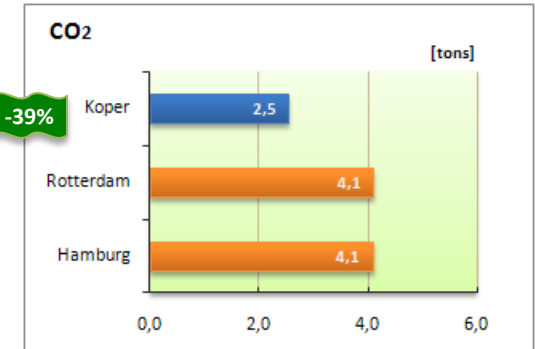
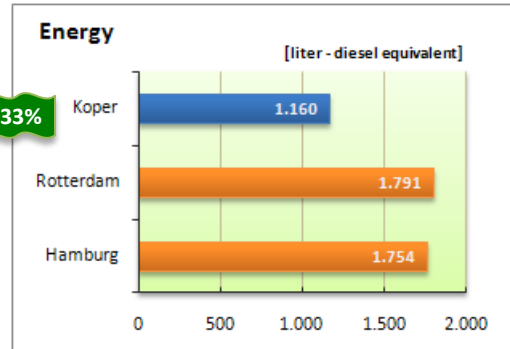
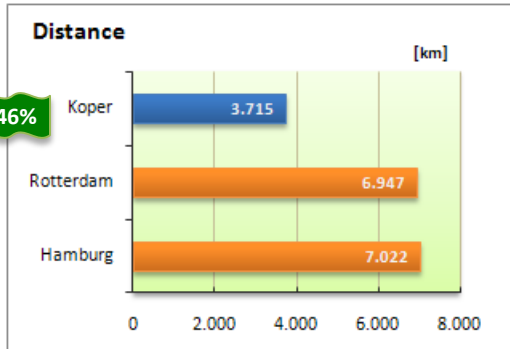


# Footprint of the NAPA Ports

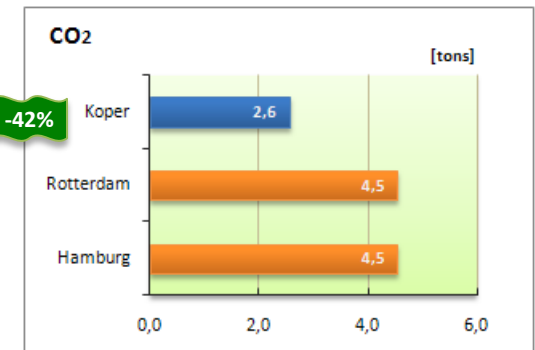
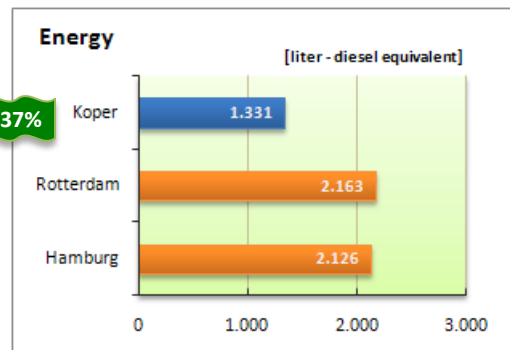
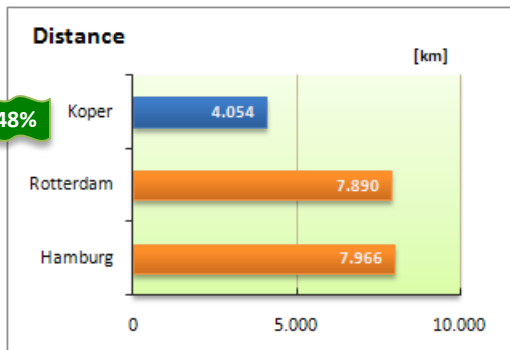


Source: www.EcoTransIT.org • Calculation parameters: Suez maritime route considered, Gioia Tauro based seaside, 40' ocean container, 30 tons average goods, average train, electrical traction

## To MOSCOW (via Belarus)



## To MOSCOW (via Ukraine)





# Adria/Danube Region as Reliable Alternative



International Transport Corridor #5



Finnish Ports – St. Petersburg

- Development of international container flow from Kotka and Hamina ports to S. Petersburg and Moscow
- Up to two block trains weekly mainly to S. Petersburg

Zabaikalsk-Beijing

- JV to be created in China to operate this route (MoU signed)
- Project LandBridge (operated jointly with Far East Land Bridge company since 2007) - 3 block trains per month go from Austria to Beijing through Zabaikalsk. Supply spare parts to BMW plants in China



Shanghai-Dobra-Moscow

- Alternative Asia-Russia route to standard route through Hamburg
- Capacity of Adriatic ports provide significant opportunity to increase volumes
- This route offers significant time savings (about 8 days)

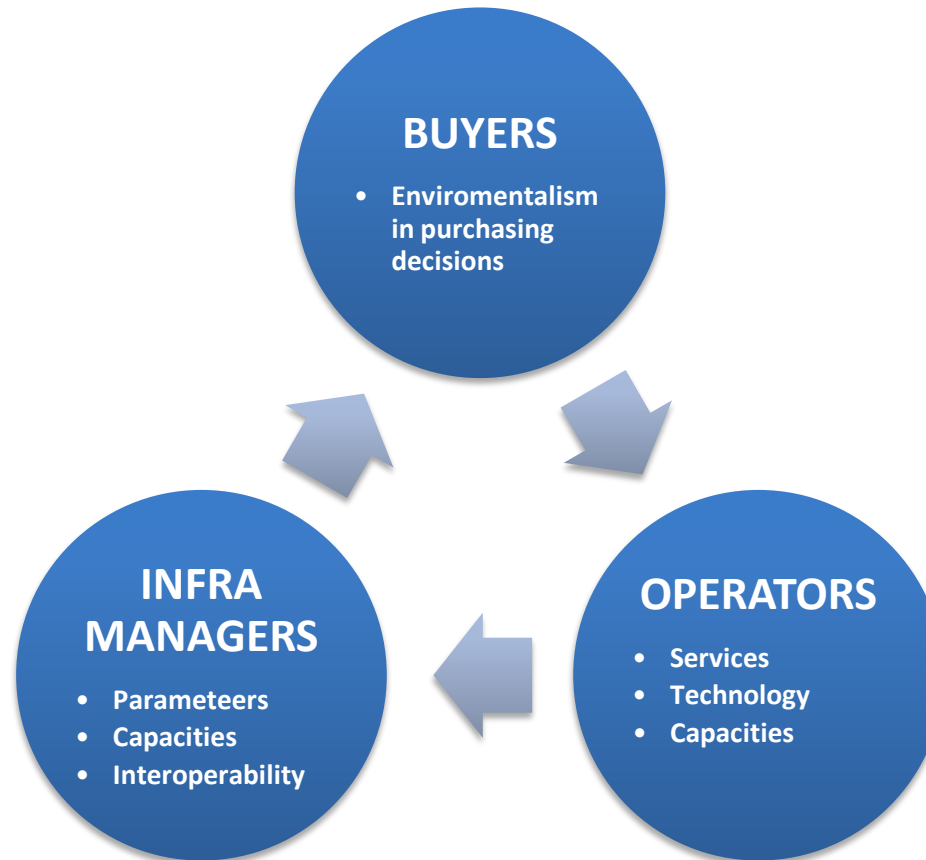
- Standard route (through Corridor #2)
- Alternative Route (through Corridor #5)
- Route from China
- Route from Finland

## Asia-Pacific Region

Hamburg/Rotterdam  
22.000 km ▶ 45-50 days

NAPA (ITC #5)  
18.000 km ▶ 31 days

# Common responsibility for sustainable traffic development – base for the Danube region transport strategy



# 4 types of investments are required to enable future growth on the rail corridors



## Objective

1	<b>Infrastructure parameters*</b>	Harmonization and optimization of infrastructure parameters to corridor standards to enable optimal end-to-end usage of corridors by RUs and related productivity gains
2	<b>Bottlenecks</b>	Provisioning of sufficient number of train slots for section and nodes that cannot accommodate the assumed volume growth
3	<b>Terminals</b>	Extension of existing terminals and construction of new terminals to accommodate strongly growing intermodal volumes
4	<b>ERTMS</b>	Standardization of signaling on corridors mainly to ETCS level 2 to enable interoperability of traction units on corridors

- Creates additional capacity per rail freight slot of 11%
- Capacity created corresponds with RU productivity induced growth of 10% (mainly train length)

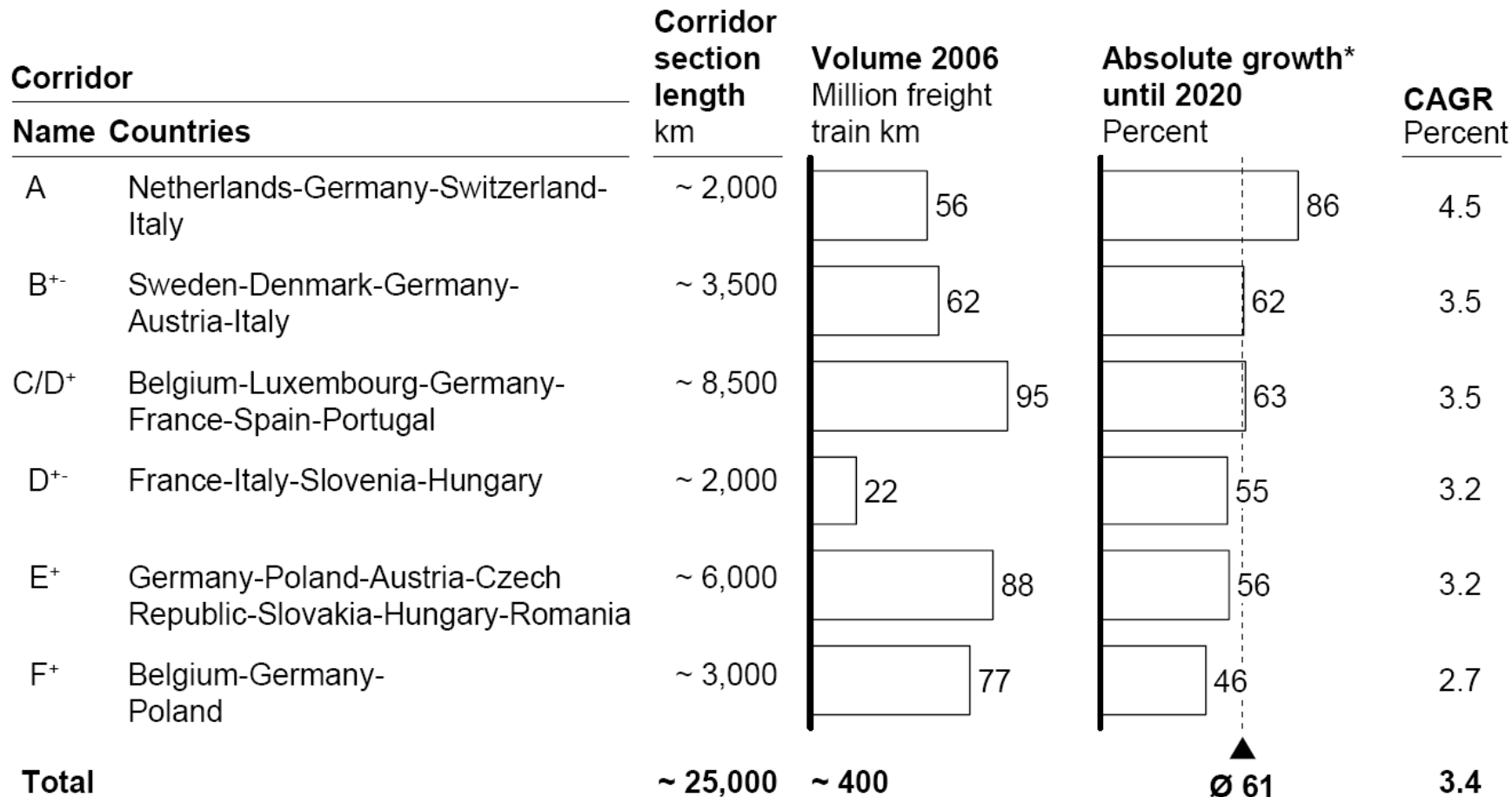
- Creates capacity of 61% for rail infrastructure
- The capacity aims to match the expected demand growth of 61%, assuming an infrastructure productivity increase of 20% until 2020

\* Train length, axle load, loading gauge, maximum speed

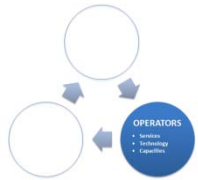
Source: CER Corridor Project 2007



# Removal of the bottlenecks must be the first step

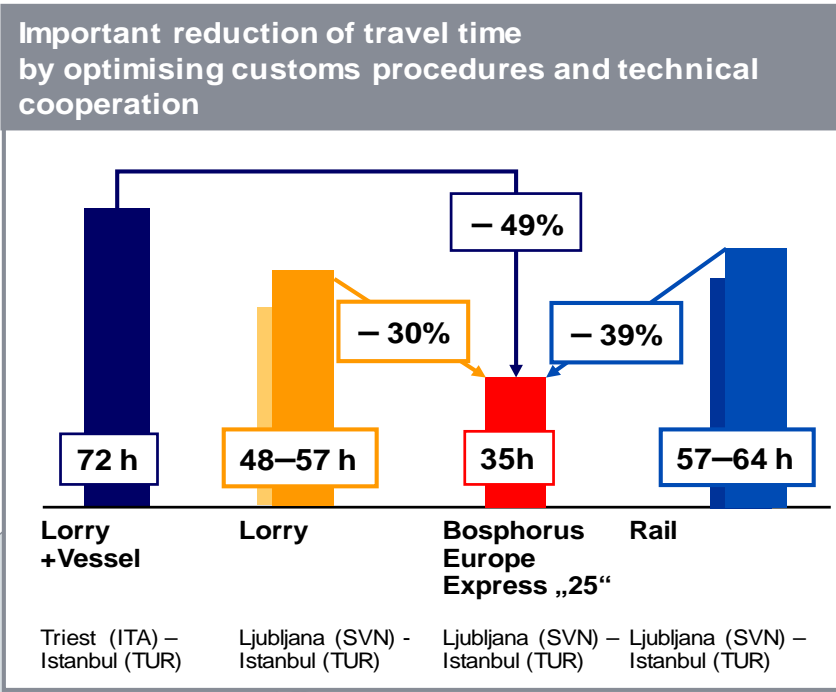
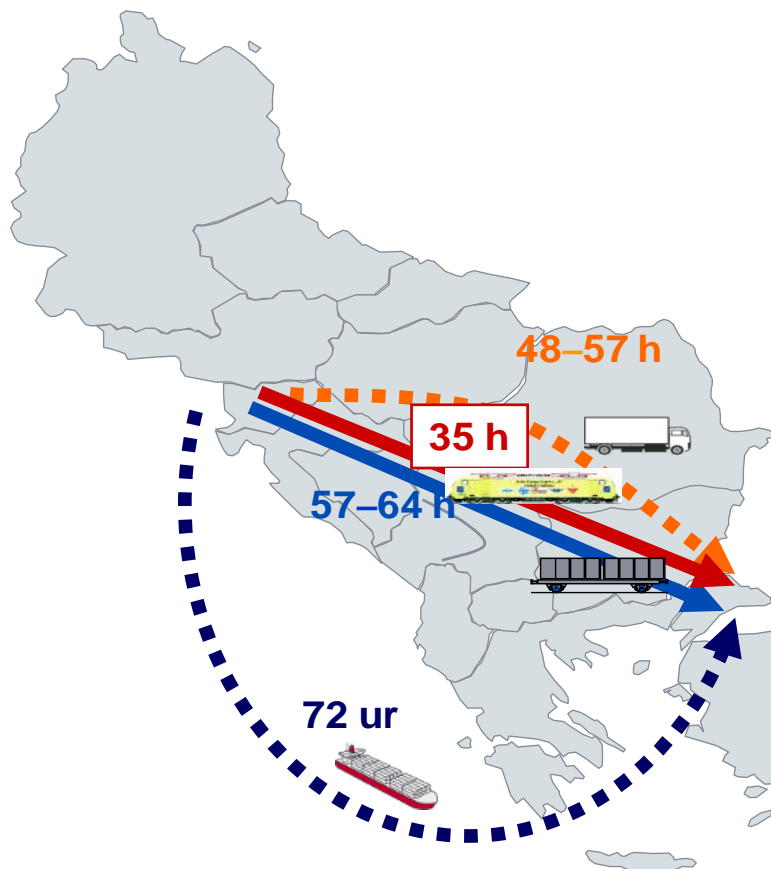


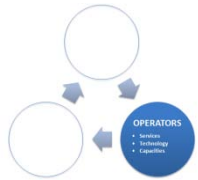
Source. CER Corridor Project 2007



# Best Practice 1

## From Ljubljana to Istanbul





# Best Practice 2

## From loose cooperation to effective project entity



**ALLIANCE**

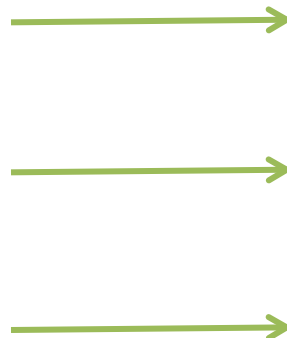
SŽ  
Slovenian Railways

HŽ Cargo  
Croatian Railways

ŽS  
Serbian Railways

ŽFBH  
Bosnia and Hercegovina  
Federal Railways

ŽRS  
Railways of Republika Srpska



**Cargo 10**

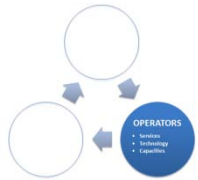
SŽ  
Slovenian Railways

HŽ Cargo  
Croatian Railways

ŽS  
Serbian Railways

Service organisation dedicated to:

- logistic and train system development
- optimization of corridor services
- promotion of corridor performance



# Best Practice 2 (ctnd.)

## Integrated Corridor Management



### PRODUCTION

#### ■ Higher level of international cooperation

- Optimize train organisation and productional activities
- Operative coordination and management of trains along the whole route
- Develop and monitor common quality targets of train performance
- Launch and coordinate internal improvement programmes

### DEVELOPMENT

#### ■ Business development / borderless transport solutions

- Once face to the customer as international cargo manager on the corridor
- New (optimised) train/logistic services for known customers
- Increase responsiveness of railway operators towards customers

### PROMOTION

#### ■ Promotion

- Promotion of the transport route and the trains system in place
- Increase awareness of the performance parameters

# Conditions to grow rail freight traffic in the Danube region



- 1 Supporting all **technical, operative and commercial solutions** that increase the competitiveness of the rail freight transport and efficiency of operations
- 2 Supporting all **infrastructural improvements**, which aim towards utilization of longer and heavier trains
- 3 Implementation of **just and leveled framework conditions** for all traffic modes / types, considering the environmental effects and other externalities
- 4 Implementation of **fiscal and other measures** to promote and stimulate intermodality, as well as to direct the traffic systems towards modern an(and economical) supply chain solutions
- 5 Development of **logistic infrastructure**, i.e. terminals, transshipment facilities and intermodal gateways





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Thank you for your attention.