

The background image shows a long-exposure photograph of a road at night, with light trails from vehicles creating vibrant streaks of orange, red, and blue against a dark blue sky.

"Ports in the SEETO and ADRION region and potential for development of intermodal links"

WORKGROUP FOR CONNECTING THE REGION

„The Adriatic-Ionian Corridors“

within the AI NURECC initiative

Split, 17.10.2018

Mate Gjorgjievski, Transport Policy and Law expert, SEETO

SEETO Regional Cooperation

SEETO Regional cooperation



MoU

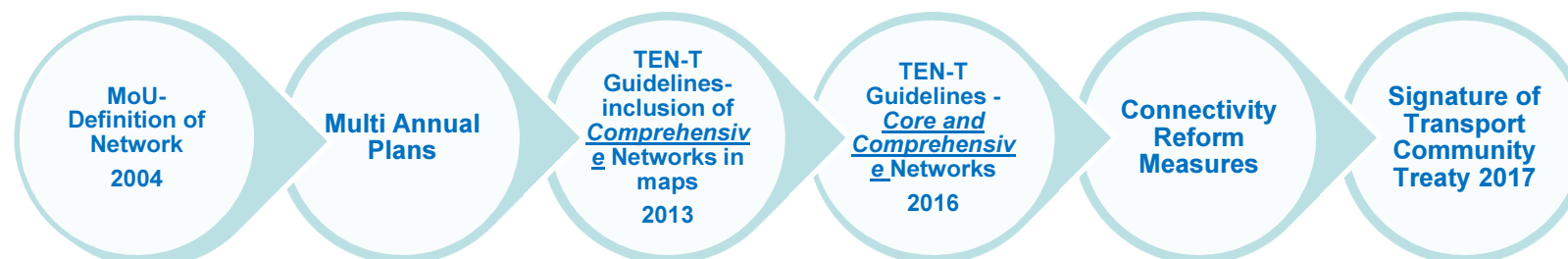
11th June 2004



TCT

12th July 2017

Indicative Extension of TEN-T to WB



Multi-annual Plan (MAP) 2018

Provides pertinent information and analyses on the whole transport system

1. Updated data on traffic flows, regulative and infrastructure developments

2. Regional Priority Projects and infrastructure investments and

3. Connectivity Reform Measures and Transport policy

Enhanced role of the MAP as a main regional transport planning document!

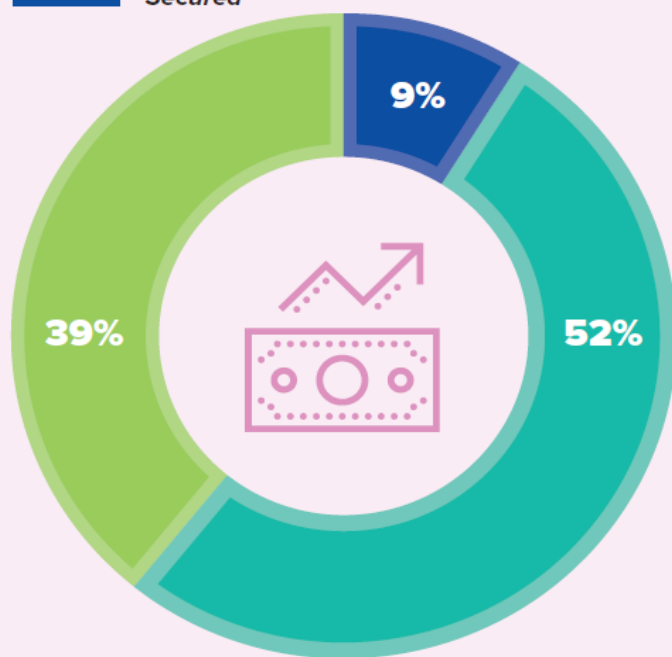
Infrastructure Investment Overview

Total investments 2004-2016

Disbursed €13.5 billion

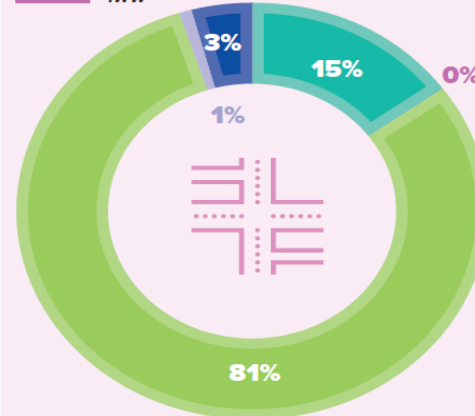
Committed

Secured



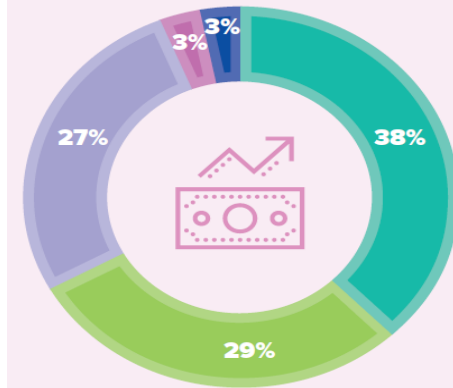
Total share by mode of transport

Road
 Rail
 IWW
 Seaport
 Airport



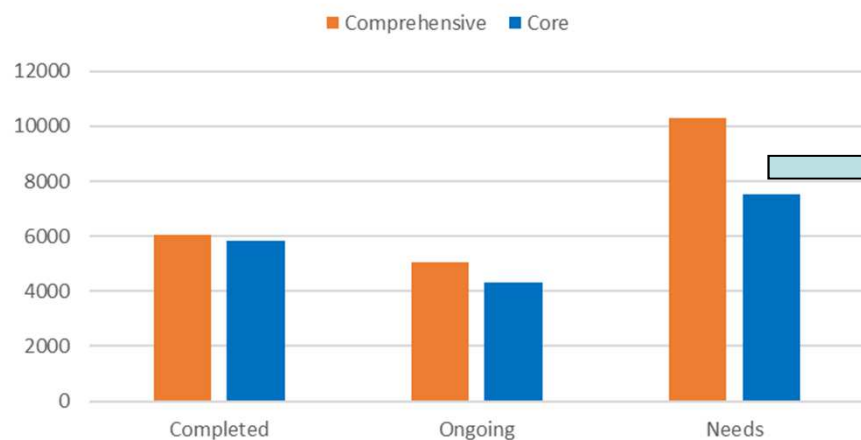
Total share by source of funding

IFI Loans
 National budget
 EU funds / Grants
 Concession
 Other sources / Loans



Ongoing projects

Investments in Road Network (in ml €)



Corridor Vc: Pocitelj-Medjugorje, €117ml
Johovac-Rudanka, €70 ml
etc.

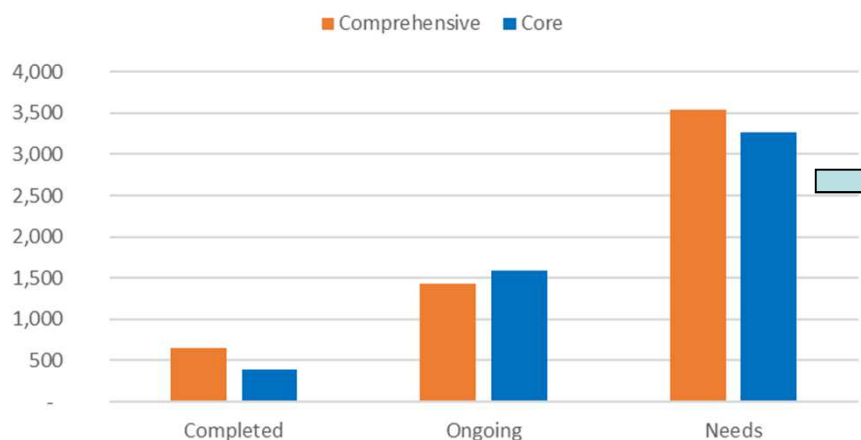
Corridor VIII: Tirana-Elbasan, €268ml
Ohrid – Kicevo, €600ml
etc.

Corridor X+: Demir Kapija-Smokvica, €227ml
Grdelica -Vladicin Han, €305ml
etc.

Route 4: Smokovac-Mateševo, €800 ml

Route 6: Pristina-Hani Elezit, €600 ml

Investments in Rail Network (in ml €)



Corridor Vc: Sarajevo-Bradina, €41ml

Corridor VIII: Durres – Tirana Terminal, €90ml
Beljakovce - Kriva Palanka, €145ml

Corridor X+: Stara Pazova - Novi Sad, €296ml
Zezelj Bridge in Novi Sad, €45ml
etc.

Route 4: Resnik - Valjevo, €73 ml

Route 10: Overall rehab. €208 ml

Connectivity agenda - Co-financed projects

Vienna Summit August 2015

Construction of Svilaj – Odzak and Svilaj Bridge, €22 ml
Completion of Banja Luka - Gradiska, € 6.8 ml
Railway Route 10, Fushë Kosovë – MKD border, €38.5 ml
Railway Route 4, Bar - Vrsac, €20 ml
Railway Corridor X, Serbia – MKD, €47 ml
Intermodal Terminal in Belgrade, €18 ml

TOTAL €148.1 ml

Paris Summit July 2016

Rehabilitation of Tirana – Durrës railway line, €35 ml
Railway Route 10, Fushe Kosove – Mitrovica, €17 ml
Railway line Nis – Bulgarian border, €44 ml

TOTAL €96 ml

Trieste Summit July 2017

Corridor Vc, section I Ponirak - Vraca, €15.9 ml
Corridor Vc, section II Tunnel Zenica – Donja Gracanica, €11.8 ml
Corridor Vc, section III Johovac Interchange – Rudanka Interchange, €15.3 ml
Rhine Danube Corridor, Port of Brcko, €3.1ml
Railway Corridor VIII, Beljakovce – Kriva Palanka, €70 ml
Railway Corridor Xc, Nis-Dimitrovgrad-Border with Bulgaria, €28.4 ml

TOTAL €144.5 ml

Connectivity Measures Progress

➤ Railway market open for domestic carries

✓ *In Albania, Kosovo, Montenegro, Serbia*



➤ Road safety inspections, ITS deployment, Road/rail maintenance and road border crossing facilitation

✓ *Connecta started in January 2017*



➤ National Connectivity Reform Measures

✓ *Joint rail operation in Tuzi started between Albania and Montenegro*

✓ *Construction works completed in CCP Merdare*



Introduction- Intermodal transport

- The favourable transit position of the region and existing SEETO Network offer great potential for the development of intermodal transport, both internally among the countries and internationally
- However, intermodality in the region is underdeveloped
- The main problems that the development of the intermodal transport in SEE region is facing refer to the following issues:
 - Institutional issues - weak institutions, inadequate organization, non-existence of relevant associations, limited strategic foresight.
 - Planning process - insufficient support to the comprehensive and wide-ranging planning process in the logistic transport chains.
 - Operational issues, which comprises weak coordination and cooperation among stakeholders in the transport chain, as well as a lack of policy initiatives by governments for intermodal transport organization.
 - Lack of infrastructure facilities - inadequate and weakly developed suitable infrastructure or superstructure, old mechanization and equipment.
 - Economic constrains – lack of the concentration of considerable transport volumes at a reduced number of terminals to enhance intermodality in the region.
 - Tariff policy issues, which do not stimulate the use of intermodal transport.
 - Awareness issues -unawareness of the benefits which an intermodal transport system provides and inadequate marketing of the benefits.

Current main intermodal flows in SEETO region



Western Balkan Intermodal Study

- ***Intermodal Study for the Western Balkans*** (small scale project) - in the framework of further developing an efficient SEETO Core and Comprehensive Network and strengthening integration and complementarity among the modes of transportation and transport logistic chains in the SEE, SEETO assisted by external consultants and supported by RCC carried out the Study in 2015-2016 under the Transport Dimension and Sustainable Growth pillar of the SEE 2020 Strategy– Jobs and Prosperity in European Perspective
 - Overall objective
 - Contribution to the long-term sustainable development of the logistics infrastructure and multimodal transport in SEE region
-
- More efficient application of means of transport, the quality of logistics and related services
 - Increasing the possibility to ensure cargo mobility
 - Improving the attractiveness and competitiveness of the whole region
 - Making a better use of national and regional resources
 - Integration of all transport sectors
 - Reducing cargo carriage costs as well as environmental impact of heavy duty vehicles

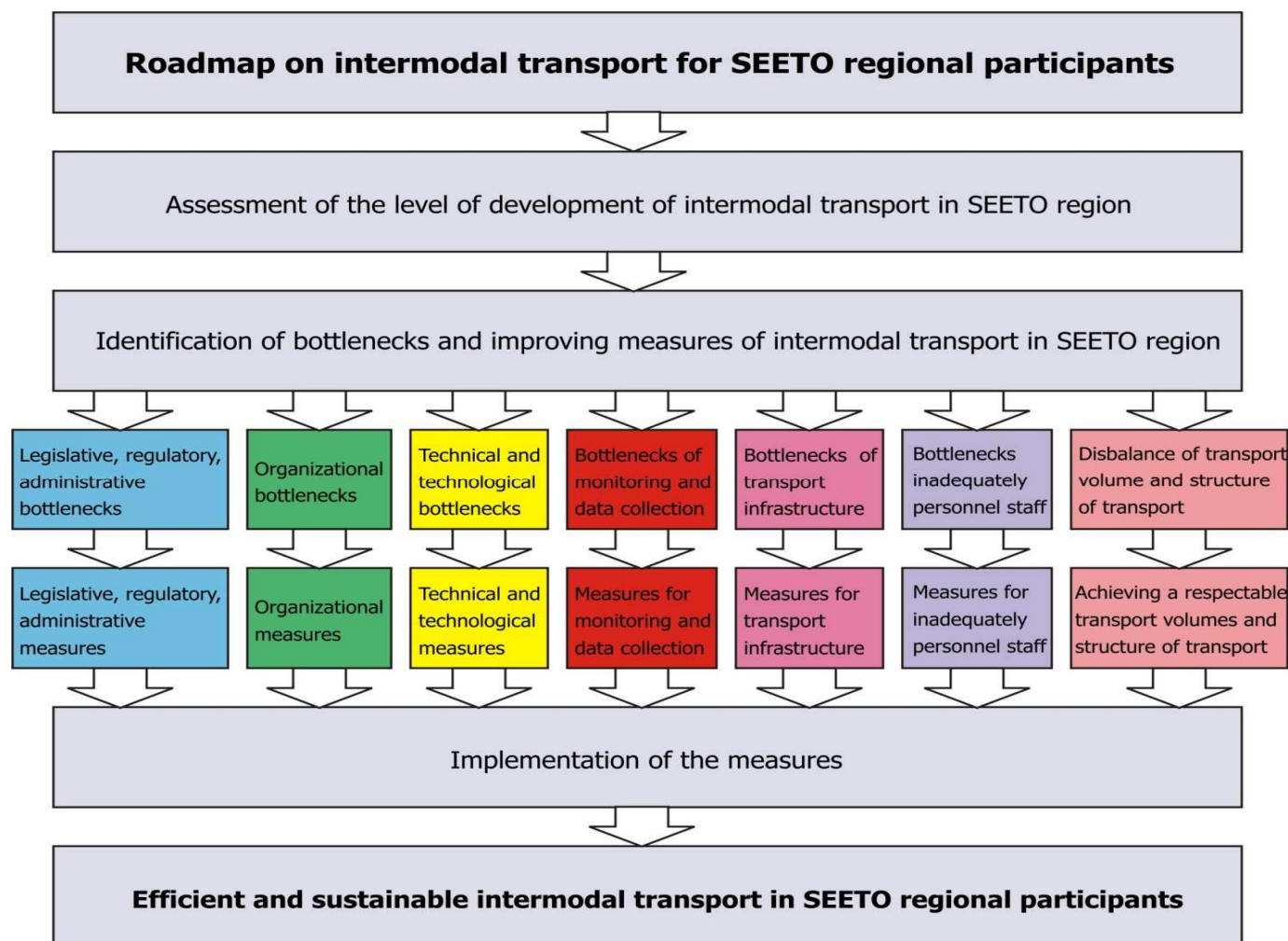
Project deliverables

- In existing situation in the SEETO region, total of 42 locations were identified with total of 46 multimodal facilities. Using the discrete model, eleven intermodal terminals have been identified as the main holders of intermodal transport services:
 - Three terminals - ***type “SEA-RAIL-ROAD TERMINALS”***
 - Port of Durres-Albania,
 - Port of Bar-Montenegro,
 - Port of Ploče - Croatia-(Port of Ploče is of paramount importance for the economy of the neighboring state of Bosnia and Herzegovina)
 - Two-terminals - ***type “RIVER-ROAD-RAIL TERMINALS”***
 - Port of Belgrade-Serbia,
 - Port of Novi Sad-Serbia;
 - Six terminals - ***type “RAIL-ROAD TERMINALS”***
 - “Intereuropa RTC” - Alipašin most-Bosnia and Herzegovina,
 - Logistic Centre Tuzla-Bosnia and Herzegovina,
 - Logistic Centre Banja Luka -Bosnia and Herzegovina,
 - Container terminal Tovarna-Skopje-Macedonia,
 - Container terminal Donje Dobrevó (Miradi)-Kosovo,
 - Logistics Centre Belgrade ŽIT-Serbia

Main Project conclusions

- The largest container traffic in the period 2004-2013 - achieved in the Port of Durres (2013 - 109,055 TEU). Port of Bar (43,708 TEU) and Port of Ploče (35,124 TEU) achieve the largest container traffic in 2008. From 2008 to 2013, container traffic generally was constantly declining or stagnating. Currently, all three terminals have equipment and capacities that allow transshipment of containers with the values of utilization factors of about 50-60%.
- Port of Belgrade and Port of Novi Sad have the equipment and capacities that are poorly developed, but due to the extreme small container traffic (2004-2013) they are sufficient for the current intermodal transport demands. An analogous situation is present in the three “rail-road” terminals but with higher values of utilization factors (similar to sea ports).
- Containerisation potential of the SEETO region is relatively significant and has not been achieved so far; it clearly supports the need for future development of intermodal transport services and infrastructure, including terminals in the region
- Relatively small transport distances between SEETO region countries could notably reduce the size of the estimated container flows.
- Only full containers were taken into account, but ratio of empty and full containers may further impact the export and import flows in the region.

Road Map on intermodal transport



Efficiency enhancing measures

- Preparing solid planning documents (intermodal studies, strategies, national programmes;
- Establishing the status of intermodal transport as an activity of special economic importance;
- Obligation of submitting data to create statistical reports and databases and procedures of information flow;
- Liberalization of the railway sector;
- Inclusion of the intermodal projects in the priority projects for the use of pre-accession EU funds;
- Internal transport-Transshipment places must be ready for accepting of TEU units;
- Adaptation of handling (reloading) facilities and entities (users of transport services) for handling of TEU units (City Logistics aspect);
- Solutions for border crossing (significant progress can be expected in this area, as part of the soft connectivity agenda and the CEFTA Additional protocol):
 - Improving the cooperation between the national Customs Authorities;
 - Submission of preliminary information, finalisation of the complete electronic data exchange;
 - Harmonisation of the control procedures and organisation of joint control with the neighbouring countries;
- The use of modern IT equipment (hardware and software).

Pilot actions

1. Database- building system which should be regularly updated and used by the private sector (update of SEETO information system)
 2. Training centre development- provide training services on different issues regarding intermodality and raise the public profile of transport policy based on modal share and intermodality principles
 3. Networked and efficient intermodal clusters development within Western Balkan region- concerns networked and efficient intermodal clusters development within Western Balkan region
- Expected impact due to the pilot action realization is to achieve following:
 - Increased added value of hubs, integrating manufacturing and sharing resources to create intermodal clusters with a much higher impact on local economies
 - Less congestion, energy, emissions, carbon footprint, noise and land-use
 - Improved door-to-door logistics performance (faster, cheaper and more reliable)
 - More efficient goods handling (30% cost reduction) stimulating multi-modal transport solutions
 - Increased intermodality and higher resilience of the transport system

Beyond SEETO region: challenges of Adriatic-Ionian (ADRION) region

imbalanced level of infrastructural development
(last mile bottlenecks, missing links along the main networks, ...)

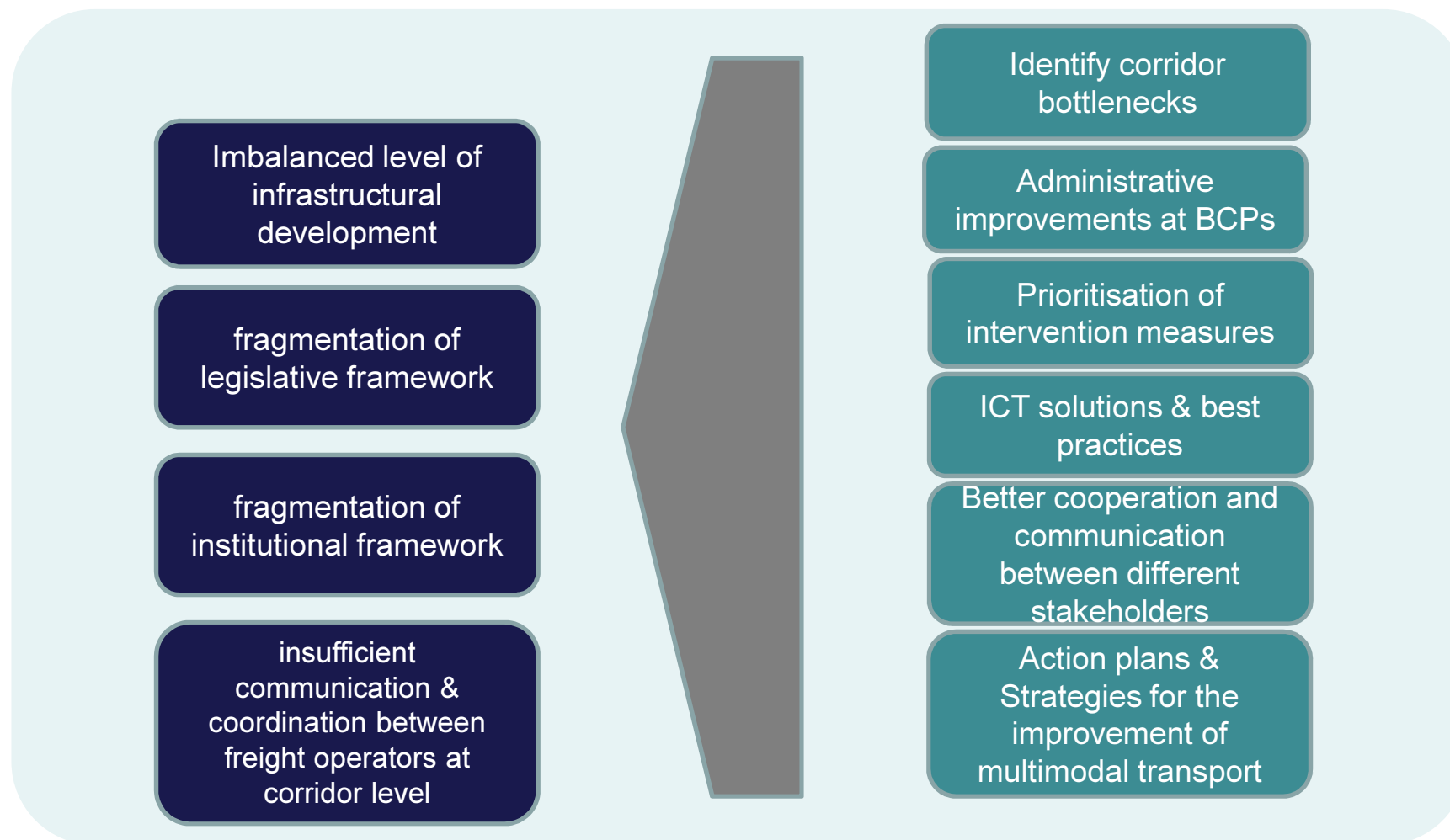
fragmentation of legislative framework
(border crossing procedures at maritime and hinterland level)

fragmentation of institutional framework

- between EU and non-EU countries
- within each country (different institutions & competences in the logistic nodes)

insufficient communication & coordination between freight operators at corridor level

ADRION challenges & ADRIPASS Project measures



ADRIPASS: specific objectives

To improve the planning capacities of **transport stakeholders** and **policy makers** facing the same challenges concerning the **multimodal transport accessibility** and **network efficiency** in the ADRION region, from both a strategic and operational perspective, through the increased cooperation among them.

To **increase planning competences of ADRION policy makers** for improved multimodal transport on the TEN-T Corridors in the ADRION region.

To enhance capacities of ADRION transport stakeholders to **streamline freight flows** at Corridor/BCP level through the use of **ICT**.

To establish a **multilevel and multidisciplinary cooperation network** of transport stakeholders and policy makers for transport facilitation in the ADRION region.

Partnership

International organizations

- **Central European Initiative - CEI (LP)**
- **South East Europe Transport Observatory - SEETO (PP3)**
- Regional Cooperation Council – RCC (AP10)

Public authorities

- **Regional Unit of Thesprotia/Region of Epirus – RUTH (PP5)**
- Ministry of Infrastructures and Transport of Italy (AP1)
- Ministry of Communications and Transport of B&H (AP3)
- Ministry of Infrastructure and Transport of Greece (AP5)
- Emilia-Romagna Region - Gen. Directorate for Territorial and Environmental safeguard (AP9)
- Ministry of the Sea, Transport and Infrastructure of Croatia (AP11)
- Ministry of Construction, Transport and Infrastructure of Serbia (AP2)
- Ministry of Transport and Infrastructure of Albania (AP4)
- Ministry of Transport and Maritime Affairs of Montenegro

Infrastructure and (public) service providers

- **Luka Koper, port and logistic system – LK (PP6)**
- **Ploče Port Authority – PPA (PP8)**
- Igoumenitsa Port Authority (AP7)
- **Durres Port Authority – DPA (PP7)**
- **Port of Bar Holding company - BPA (PP9)**
- Interporto Bologna SpA (AP8)

Business support

- **Foreign Trade Chamber of Bosnia and Herzegovina (PP10)**

Higher education & research Institutions

- **Aristotle University of Thessaloniki – Department of Transportation and Hydraulics engineering - AUTH (PP4)**
- **Institute for Transport and Logistics Foundation - ITL (PP2)**

ADRIPASS Outputs

Final transnational action plan for transport facilitation in the Adriatic Ionian region

WP1

(T1.2.4)

ICT Action Plan for improving multimodal transport in ADRIAN regions

WP2

(T2.1.1)

Transnational strategy for the enhancement of multimodal transport efficiency and competitiveness of the transport sector in the Adriatic-Ionian Region (T3.1.1)

WP3

Transnational Cooperation Network for the improvement of multimodal transport in the Adriatic-Ionian Region (T3.2.1)

ADRION Indicators

Number of strategies and action plans developed in the field of environment-friendly and low-carbon transport systems

Number of supported transnational cooperation networks in the field of environment-friendly and low-carbon transport systems

Technical WPs

WPT1 – Integrated multimodal transport

Transnational Methodology for data collection of BCPs at corridor level -> Data collection (surveys, desktop research, partner's inputs) -> Analysis -> 2 reports (1 interim, 1 final)

-> Final transnational action plan for the facilitation of freight transport in the ADRION region (prioritisation of transport simplification measures)

AUTH

WPT2 – ICT tools for improving multimodal transport

Results of the Action plan (WPT1) + Report of the transnational best practices concerning ICT tools for ports and BCPs (WPT2) -> 4 pilot actions & 1 pre-investment study -> ICT Action plan for improving multimodal transport in the ADRION region

LK

WPT3 – ADRION transnational institutional cooperation

Results of WPT1+WPT2 -> Transnational strategy for the enhancement of multimodal transport efficiency and competitiveness of the transport sector in the ADRION region -> Transnational cooperation network

SEETO

Thank you for your attention !

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