

The EU Strategy for the Danube Region  
Priority Area 1b: To improve mobility and Multimodality – road, rail and air links

# A snapshot on Multimodal Freight Transport in the Danube Region Countries

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European Freight Transport,  
better Transport Connectivity  
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culture,  
Sofia, Bulgaria

# The Danube Region ...

EUSDR - **11 Priority areas:**  
- 24 June 2011: endorsed by  
the European Council!

## PA 1: To improve Mobility and Multimodality

✓PA 1a: inland  
waterways - Austria  
and Romania

✓PA 1b : rail, road and  
air links - Slovenia and  
Serbia



- **14 States:** Germany, Austria, Czech Republic, Croatia, Slovakia, Hungary, Slovenia, Romania, Bulgaria, Bosnia and Herzegovina, Serbia, Montenegro, Moldova, Ukraine
- **Population:** 115 million (EU27: 502 mio) **Area:** 1,092.591 km<sup>2</sup> (EU27: 4,324,782)

# Understanding the Region

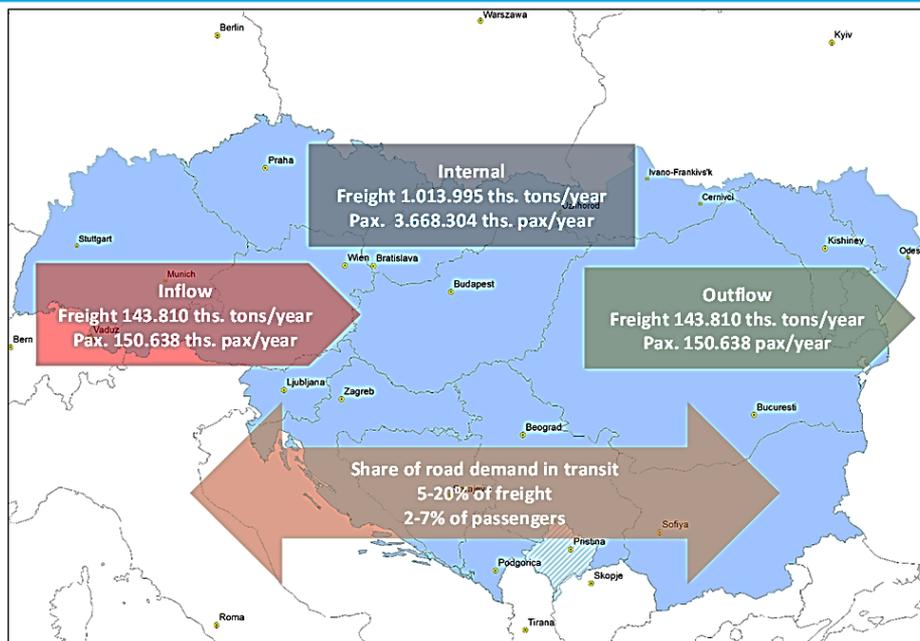
**Basic STUDIES for the Danube macro-region initiated, supported and facilitated by PA1b:**

- 1) Transport Analysis for the Danube Region (TAD);**  
completed June 2017
- 2) Transport Infrastructure – Road links;**  
to be completed end March 2018
- 3) Study of Intermodal transport Users' Needs in the Danube Region;**  
to be completed September 2018

Available at PA1b Web site: [www.danube-transport.eu](http://www.danube-transport.eu)

# Road and Rail Transport

## Current transport demand



### Road and rail transport flows:

- mostly domestic
- short/medium distance
- modal split in favour of the road

Transport mode	Unit of measurement	Road		Rail		Total	
		2010	2015	2010	2015	2010	2015
FREIGHT	thousand tonnes	937.657	<b>989.476</b>	220.147	<b>224.764</b>	1.157.804	<b>1.214.240</b>
	modal share (%)	81,0	<b>81,5</b>	19,0	<b>18,5</b>	100,0	<b>100,0</b>
	variation (%)		+ 5,5		+ 2,1		+ 4,9
PASSENGERS	thousand passeng.	3.613.646	<b>3.725.783</b>	204.995	<b>229.496</b>	3.818.679	<b>3.955.280</b>
	modal share (%)	94,6	<b>94,2</b>	5,4	<b>5,8</b>	100,0	<b>100,0</b>
	variation (%)		+ 3,0		+ 12,0		+ 3,5

Source: TRT elaborations on TRUST transport model and Eastern Partnership regional transport study ([www.danube-transport.eu](http://www.danube-transport.eu))

# Air Freight Transport

## Current transport demand

### Total volumes of air freight transport in the Danube Macro-Region [tonnes]

Source: Eurostat (2016), National Statistics (2016), Airport Statistics (2016)

Country	2010	2015
<b>Austria</b>	257.983	<b>246.613</b>
Bulgaria	21.184	<b>31.720</b>
Czech Republic	65.506	<b>58.360</b>
Croatia	8.448	<b>7.701</b>
<b>Germany (2 Laender)</b>	362.050	<b>415.816</b>
Hungary	65.303	<b>65.740</b>
Romania	24.741	<b>33.434</b>
Slovakia	17.831	<b>21.222</b>
Slovenia	7.645	<b>8.901</b>
Bosnia and Herzegovina	n. a.	<b>10.097</b>
Serbia	9.946	<b>15.392</b>
Montenegro	n. a.	<b>n. a.</b>
Moldova	2.400	<b>0</b>
Ukraine (4 regions/oblast)	n. a.	<b>n. a.</b>
<b>Total</b>	<b>843.037</b>	<b>914.996</b>

### Total volumes of air freight transport handled in the main airports [tonnes]

Source: Eurostat (2016), National Statistics (2016), Airport Statistics (2016)

Airport	2010	2015
<b>Vienna</b>	<b>250.733</b>	<b>235.794</b>
Sofia	15.343	18.801
Prague	58.129	50.440
Zagreb	7.442	7.057
<b>Munich</b>	<b>317.899</b>	<b>376.250</b>
Budapest	65.303	65.740
Bucharest	22.988	29.193
Bratislava	17.719	20.978
Ljubljana	7.645	8.901
Sarajevo	n. a.	4.598
Belgrade	8.391	14.839
Podgorica	n. a.	n. a.
Chisinau	2.400	n. a.
Odesa	n. a.	n. a.
<b>Total of the main airports</b>	<b>773.992</b>	<b>832.591</b>
% of the total of the Danube Macro-Region	92%	91%

# The Future for Road, Rail and Air Freight

## Indicative projections up to 2030 [thousand tonnes]

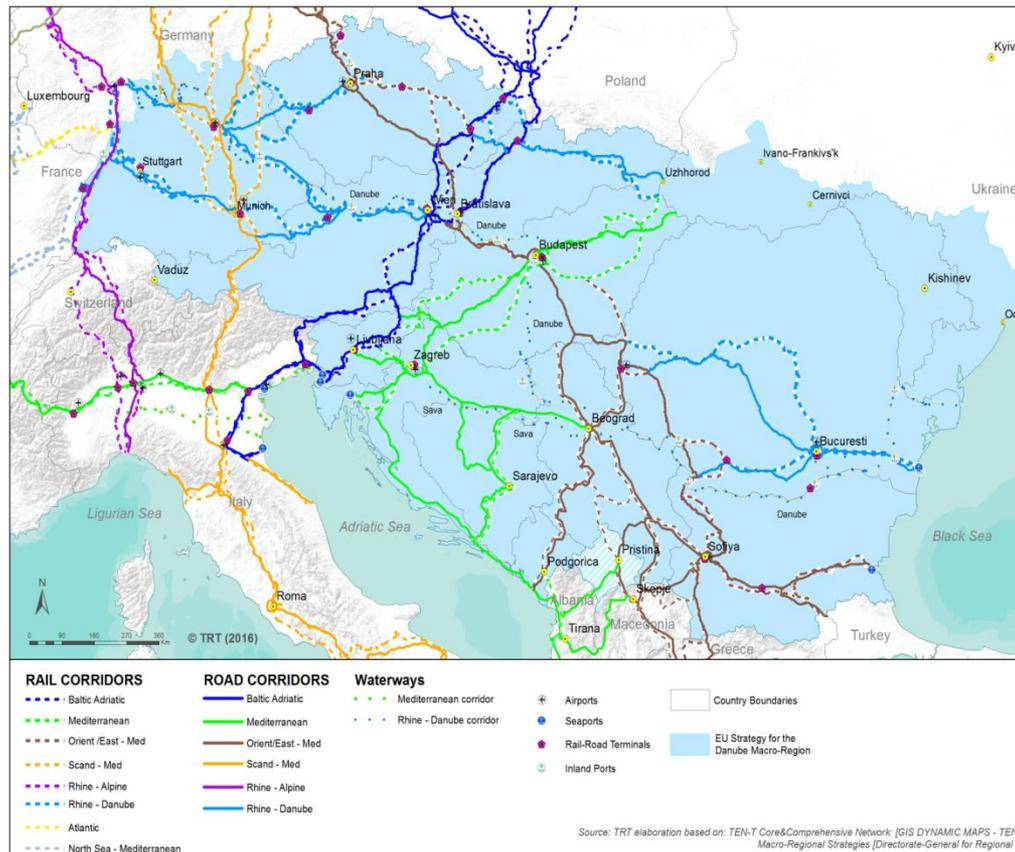
Source: TRT elaborations on Capros et al. (2016), EC (2014), National Transport Plans and Strategies

Danube Macro-Region	2015	2030		Indicative projection of annual growth rate [%]		Total growth [%]	
		Minimum	Maximum	Minimum	Maximum	Minimum	Maximum
<b>RAIL Freight</b>	<b>333.816</b>	<b>410.530</b>	<b>492.497</b>	<b>1,56</b>	<b>2,58</b>	<b>22,98</b>	<b>47,54</b>
<b>ROAD Freight</b>	<b>842.983</b>	<b>1.033.223</b>	<b>1.150.159</b>	<b>1,50</b>	<b>2,47</b>	<b>22,57</b>	<b>36,44</b>
<b>AIR Freight</b>	<b>917.865</b>	<b>1.106.011</b>	<b>1.250.902</b>	<b>1,39</b>	<b>2,56</b>	<b>20,50</b>	<b>36,28</b>

# TEN-T CNC crossing the Danube macro-region

TEN-T (Reg. 1315/2013 on TEN-T and Reg. 1316/2013 on CEF)

CNCs, including indicative extensions to the Western Balkans



**1. Scandinavian-Mediterranean Corridor (FI, SE, DK, DE, AT, IT, MT)** - Mr. Pat Cox (IE); Since 12 March 2014

**2. Baltic-Adriatic Corridor (PL, SK, CZ, AT, SI, IT)** - Mr. Kurt Bodewig (DE); Since 12 March 2014

**3. Orient/East-Med Corridor (DE, CZ, SK, AT, HU, RO, BG, GR, CY)** - Mr. Mathieu Grosch (BE); 1 July 2014

**4. Mediterranean Corridor (ES, FR, IT, SI, HR, HU)** - Mr. Laurens Jan Brinkhorst (NL); Since 12 March 2014

**5. Rhine-Danube Corridor (FR, DE, AT, CZ, SK, HU, HR, RO, BG)** - Ms Karla Peijs (NL); Since 12 March 2014

**6. Rhine-Alpine Corridor (NL, BE, DE, FR, IT)** - Mr. Paweł Wojciechowski (PL); Since 27 May 2015

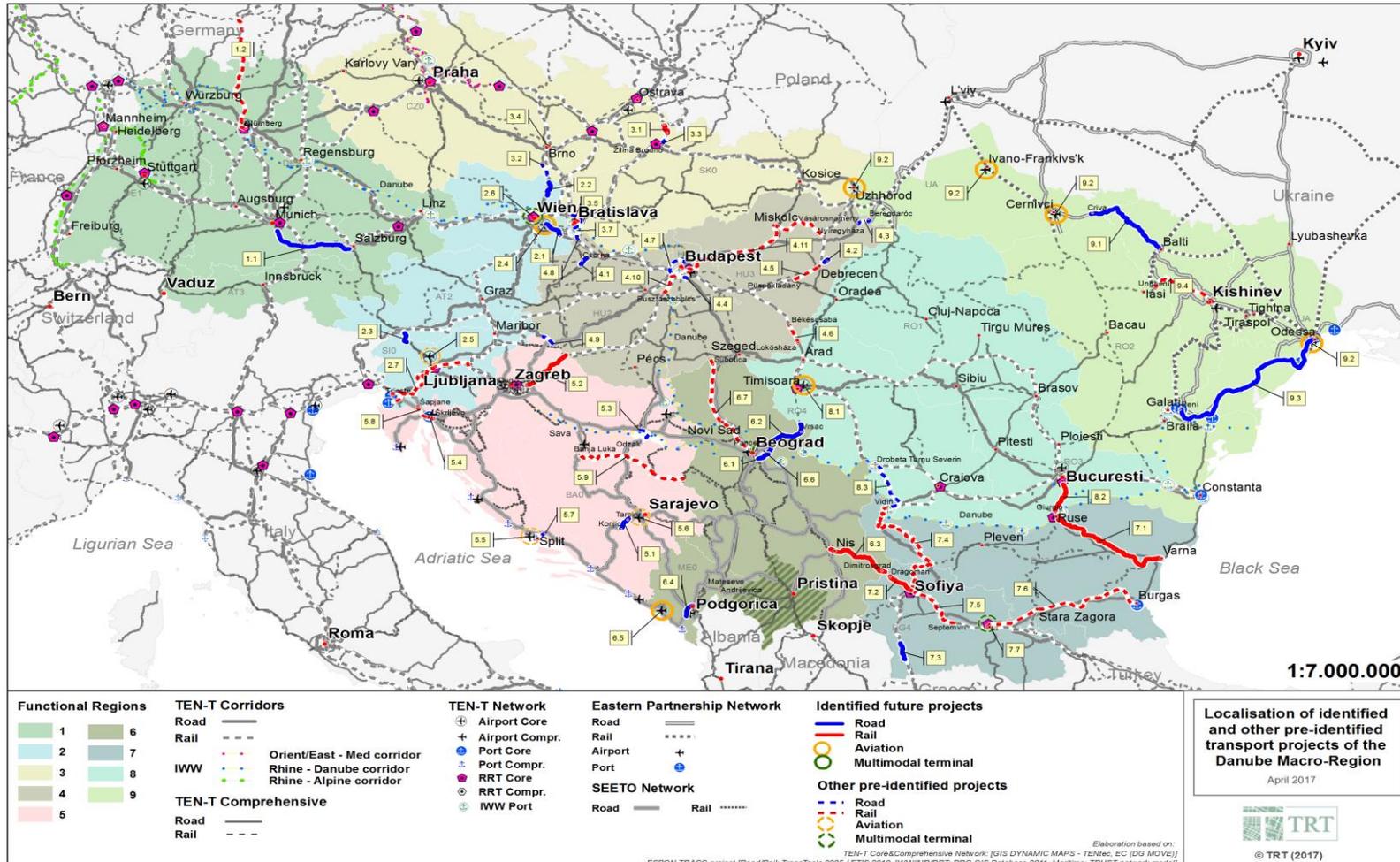
**7. Atlantic Corridor (PT, ES, FR, DE)** - Mr. Carlo Secchi (IT); Since 12 March 2014

**8. North Sea-Baltic Corridor (NL, BE, DE, PL, LT, LV, EE, FI)** - Ms Catherine Trautmann (FR); Since 12 March 2014

**9. North Sea-Mediterranean Corridor (IE, UK, FR, NL, BE, LU)** - Mr. Peter Balazs (HU); Since 12 March 2014

Source: TRT elaboration based on: TEN-T Core & Comprehensive Network; GIS DYNAMIC MAPS - TEN-T; Macro-Regional Strategies (Directorate-General for Regional and Urban Policy)

# The pre-identified and new transport projects



# Pre-identified Strategic Projects

## EXAMPLES OF PRE-IDENTIFIED STRATEGIC PROJECTS: SHORT – MEDIUM TERM

Country	PROJECT
<b>Germany (Bayern)</b>	<b>ROAD:</b> Motorway A8 AS Rosenheim – Border DE/AT; <b>6 lane widening</b> Rosenheim-Achenmühle Achenmühle-Bernauer Berg
<b>Austria</b>	<b>TERMINAL:</b> Planning and construction of the expansion of the trimodal Port of Freudenau/Vienna
<b>Slovenia/Austria</b>	<b>TUNNEL:</b> Construction of a second tube for the Karawanks motorway tunnel
<b>Czech Republic</b>	<b>RAIL:</b> Brno junction modernisation/new main station (Studies, Works)
<b>Slovakia</b>	<b>RAIL:</b> Bratislava junction modernisation / Development of Rail Node Bratislava, incl. Airport Rail Link (Works)
<b>Hungary</b>	<b>AIR:</b> Construction of the railway connections of Budapest Liszt Ferenc Airport.
<b>Croatia</b>	<b>RAIL:</b> Construction of the second track on the railway line section Križevci – State border with HU, ERTMS 1
<b>Bosnia and Herzegovina</b>	<b>RAIL:</b> Modernization of railway Banja Luka-Doboj-Tuzla-Zvornik-Srbija - Action (1)
<b>Serbia</b>	<b>RAIL:</b> Reconstruction and Modernization of the railway line Belgrade - Novi Sad - Subotica - border with HU
<b>Montenegro</b>	<b>AIR:</b> Tivat Airport
<b>Bulgaria</b>	<b>TERMINAL:</b> Construction of a new intermodal terminal in Plovdiv area
<b>Romania</b>	<b>ROAD:</b> Drobeta-Turnu Severin – Maglavit/Calafat Road upgrade (Works).
<b>Moldova</b>	<b>ROAD:</b> A) Rehabilitation of National road M14 - Section Balti - Criva
<b>Ukraine</b>	<b>ROAD:</b> Construction of a new Odessa-Reni road

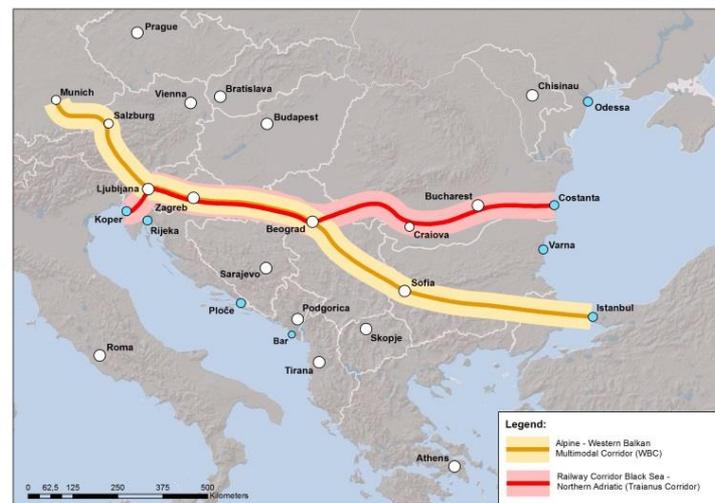
# New proposed Corridor Initiatives

Proposals supported by PA1b Steering Group:

**b) „Traianus“ Rail Freight Corridor** (Constanta – Bucharest – Craiova - Turnu Severin – Belgrade – Zagreb – Ljubljana – Koper/Rijeka):

**a) Multimodal „Alpine-Western Balkans Corridor“:** Munich - Salzburg – Ljubljana – Zagreb – Belgrade – Sofia - Svilengrad - (Istanbul)

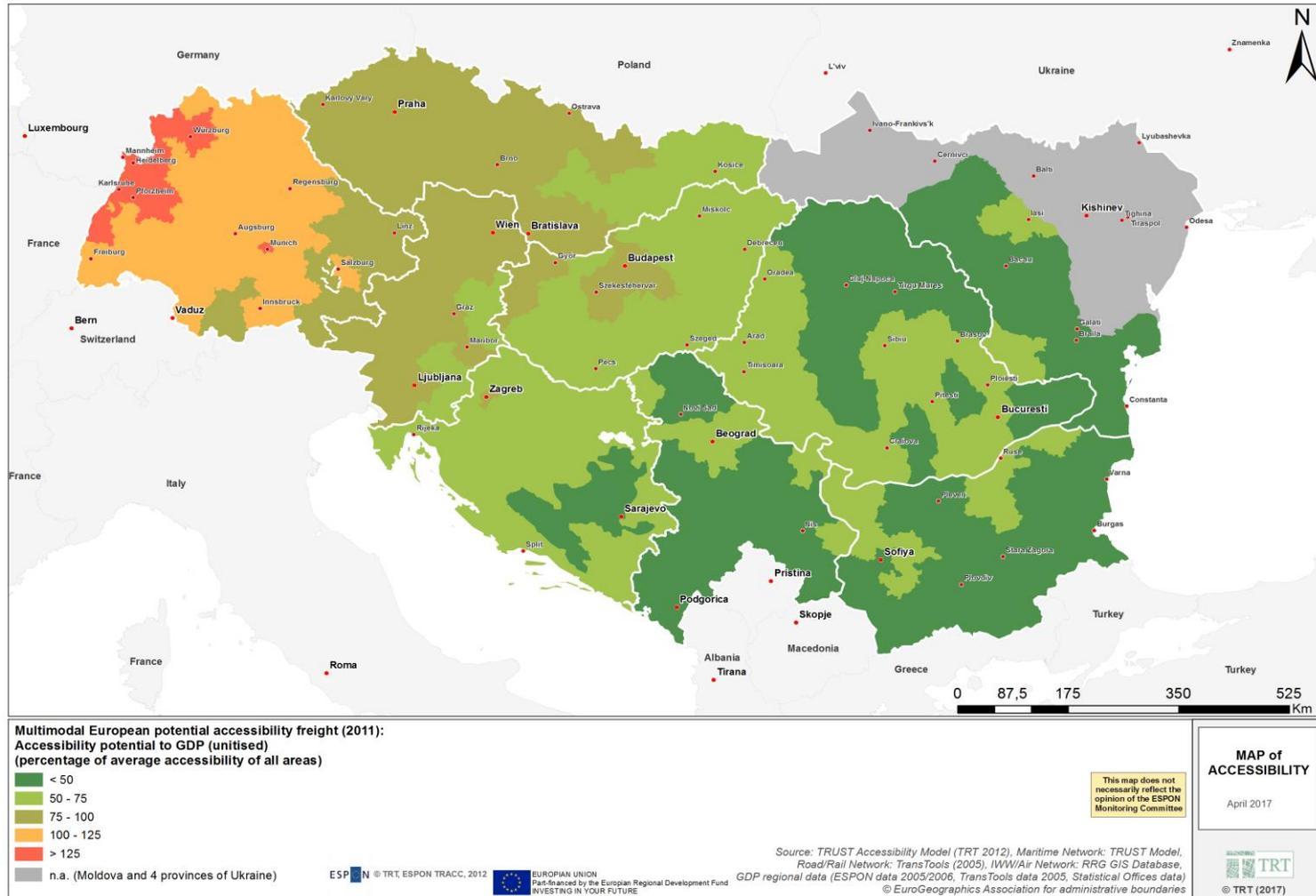
*Note: Letter of Intent signed on 7.10.2015 (for the RFC from Salzburg to Svilengrad (BG))!*



**Legend:**  
— Railway Corridor Black Sea - Northern Adriatic (Traianus Corridor)

**Legend:**  
— Alpine - Western Balkan Multimodal Corridor (WBC)  
— Railway Corridor Black Sea - Northern Adriatic (Traianus Corridor)

# Challenges: Accessibility



# Challenges: Motorways (draft)

Danube Region

Motorways and expressways



**LEGEND ROADS**

Motorway, expressway

**PORTS**

Airport

Seaport

Inland Port

Country border

Outside Danube region

Sea

City

Rivers Danube and Sava

**ROADS:**

- Total lengths **880.000 km,**
- Motorways **12.592 km**
- main or national roads **105.593 km**
- No common categorisation!

# Challenges: Logistics

## Logistics Performance Index (LPI)

measures logistics efficiency:

### Six component indicators:

- 1) The efficiency of the **clearance process** (e.g. speed, simplicity)
- 2) **Quality of infrastructure** (roads, rail, ports, RRT, ITS)
- 3) The ease of arranging **competitively priced shipments**
- 4) The competence and **quality of logistics services** (transport operators, customs brokers)
- 5) The **ability to track and trace consignments**
- 6) The frequency with which **shipments reach the consignee within the scheduled or expected delivery time**

## Danube macro-region countries:

**LPI ranking and scores 2012, 2014 and 2016** (of 160 countries)

Country	Rank	Country	Rank
<b>Germany</b>	<b>(4) (1) 1</b>	<b>Romania</b>	<b>(54) (40) 60</b>
<b>Austria</b>	<b>(11) (22) 7</b>	<b>Bulgaria</b>	<b>(36) (47) 72</b>
<b>Czech Republic</b>	<b>(44) (32) 26</b>	<b>Serbia</b>	<b>(75) (63) 76</b>
<b>Hungary</b>	<b>(40) (33) 31</b>	<b>Ukraine</b>	<b>(66) (61) 80</b>
<b>Slovakia</b>	<b>(51) (43) 41</b>	<b>Moldova</b>	<b>(132) (94) 93</b>
<b>Slovenia</b>	<b>(34) (38) 50</b>	<b>Bosnia &amp; Herzegovina</b>	<b>(55) (81) 97</b>
<b>Croatia</b>	<b>(42) (55) 51</b>	<b>Montenegro</b>	<b>(120) (67) 123</b>

Source: World Bank (Connecting to compete 2016: Trade logistics in the global Economy  
<http://lpi.worldbank.org/international/global/2016>)

# Conclusions

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EUSDR PA1b place great emphasis on:

- **Merging the EU and non-EU transport systems**  
Following as much as possible approaches of:
  - ✓ Co-modality, full modal integration and synchro-modality, while paying attention to secondary and tertiary transport networks linking with TEN-T;
- **Bridging the transport gap between the EU and Non-EU countries**, as well as between upper Danube and lower Danube countries, such as:
  - ✓ quality of transport infrastructure, quality of services (e.g. logistics), road safety, etc.

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# Thank you very much!

Please visit:  
[www.danube-transport.eu](http://www.danube-transport.eu)



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