



SEETO

SOUTH-EAST EUROPE TRANSPORT OBSERVATORY



Multimodal challenges and opportunities in the region

High-level Conference on European Multimodal Freight
Transport better Transport Connectivity

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Dejan Lasica, SEETO General Manager

Introduction

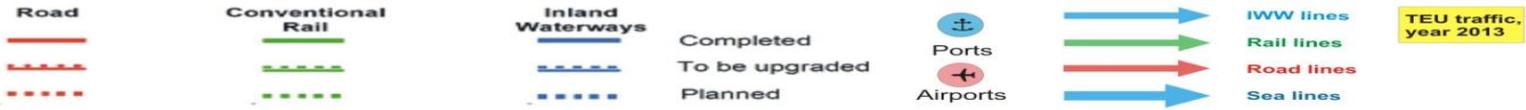
- The favourable transit position of the region and existing SEETO Network offer great potential for the development of intermodal transport, both internally among the countries and internationally
- **However, intermodality in the region is underdeveloped**
- The main problems that the development of 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** - underdeveloped awareness of the benefits which an intermodal transport system provides and inadequate marketing of the benefits.

Classification of Intermodal terminals in SEETO Regional Participants

SEETO regional participants	Intermodal terminal	TEU traffic in 2013	Class
Albania	Port of Durres	109,055	Class D1
Bosnia and Herzegovina	Port of Ploče**	18,713	Class D2
	Railway station Alipasin Most (Sarajevo)	8,982	Class A3
	Logistic centre Tuzla	2,245	Class A3
	Banja Luka	<2000	Class A3
the former Yugoslav Republic of Macedonia	Tovarna-Skopje	<2000	Class A3
Kosovo*	Donje Dobrevo (Miradi)	<2000	Class A3
Montenegro	Port of Bar	33,029	Class D2
Serbia	Port of Krajina Prahovo	<200	Class C2
	Port Feranex AG JSC , Smederevo	<200	Class C2
	Port of Senta	<200	Class C2
	Port of Novi Sad	<500	Class C2
	Port of Belgrade	188	Class B2
	Port Danube, Pancevo	<500	Class C2
	Logistics centre Belgrade ZIT	28,000	Class A2

^[1] *This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence.

Intermodal flows





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

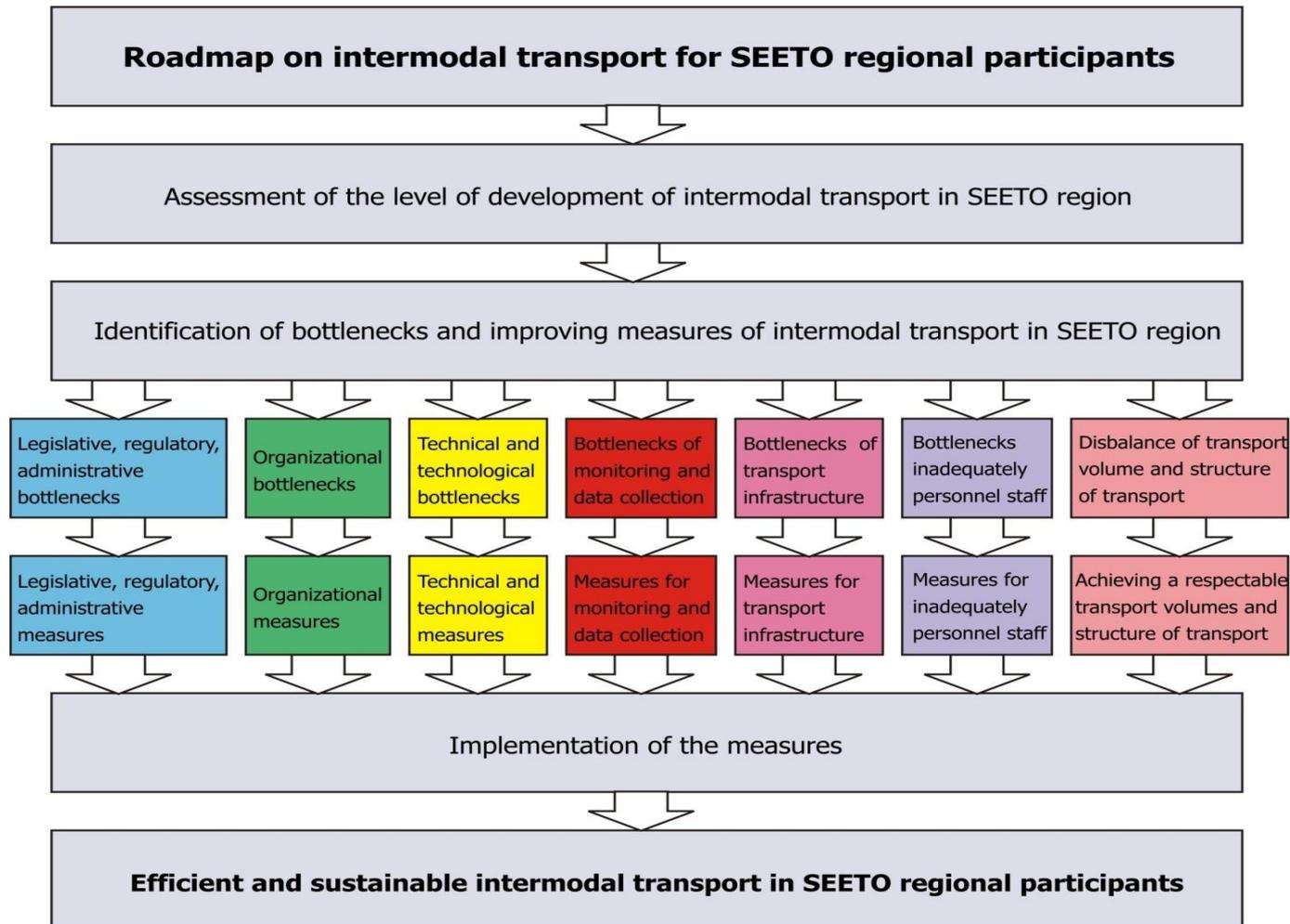
Project deliverables

- In existing situation in the SEETO region, total of 42 locations were identified with total of 46 multimodal facilities.
- 11 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-the former Yugoslav Republic of Macedonia,
 - Container terminal Donje Dobrevo (Miradi)-Kosovo,
 - Logistics Centre Belgrade ŽIT-Serbia

Main Project conclusions

- The largest container traffic in the period 2004-2013 - achieved in the Port of Durrës (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 poor 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

Finance secured Connectivity Agenda projects (2015, 2016,2017)

Projects with relevance to potential development of intermodality:

- Orient/East-Med Corridor: the former Yugoslav Republic of Macedonia – Bulgaria CVIII Rail Interconnection (Beljakovce – Kriva Palanka)
- Orient/East-Med Corridor: Serbia – Bulgaria CXc Rail Interconnection (Nis – Dimitrovgrad – Border with Bulgaria)
- Orient/East-Med Corridor: the former Yugoslav Republic of Macedonia – Kosovo* R10 Rail Interconnection (Fushë Kosovë / Kosovo Polje – border between the two states)
- Orient/East-Med Corridor: Montenegro – Serbia R4 Rail Interconnection (Bar – Vrbnica section in Montenegro)
- Orient/East-Med Corridor: Serbia – the former Yugoslav Republic of Macedonia CX Rail Interconnection (Nis - Brestovac section in Serbia)
- Orient/East-Med Corridor: CX Intermodal Terminal in Belgrade, Serbia
- Mediterranean Corridor: Montenegro- Albania – Greece Rail Interconnection (Tirana - Durrës section in Albania)
- Rhine / Danube Corridor: Bosnia and Herzegovina – Serbia – Croatia Waterway Interconnection (Port of Brcko)

TOTAL INVESTMENTS:

- EU Grants- **318** million EUR;
- Leveraged investments: **626** million EUR



Thank you for your attention !

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