Ports and their Connection within the TEN-T

July 7, 2010 (Centre Albert Borschette)

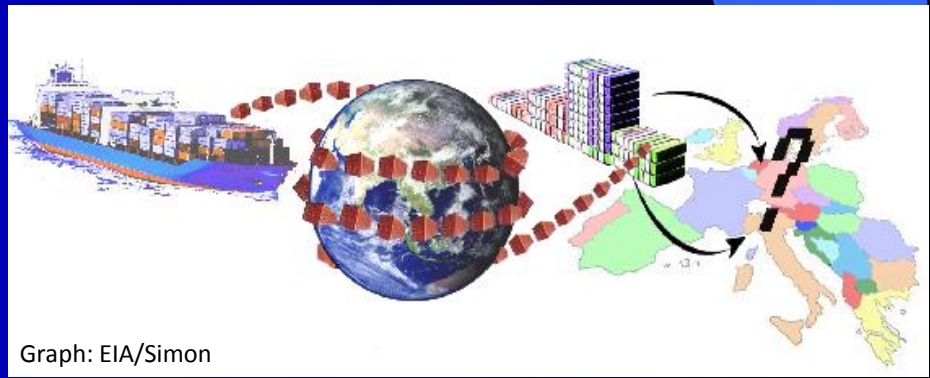
Peter Wolters, Deputy Secretary General

European Intermodal Association

EUROPEAN INTERMODAL ASSOCIATION

Port-Hinterland Policies, Networks, Players and Initiatives

1. Global Intermodal Infra Investments
2. National Port-Hinterland Policies (B-G-F-NL / CH)
3. Port-Hinterland Networks , Terminals



Graph: EIA/Simon

Global Intermodal Infrastructure

(mode overlapping)

- By 2030, estimated USD 41 trillion required global level infrastructure *
- USA: stimulus programme upgrade infrastructure USD 500 BLN (2010-2016)
- INDIA: investments rail connectivity to ports; additional 2,000 route km electrified as from 2010. Expanding highways by 32,000 km in 2009
- RUSSIA: construction 20,000 km new railways connecting Russia – EU by 2030 (increase of 24%)
- CHINA: infrastructure spending accounts 80% of total infrastructure in whole East Asia region USD 350 billion (2006 and 2010)
- ABU DHABI: Economic Vision Plan 2030, USD 82.9 BLN earmarked transport infrastructure
- BRAZIL: Growth Acceleration Programme (PAC 2) providing USD 880 BLN for infrastructure until 2014
- Increase infrastructure spending needed 2020; actual global spending only USD 1 trillion per year

* Source: Booz Allen Hamilton (2007)

Europe's production area: China

- Cargo volumes Eurasian continental landbridge continue to rise
- Various shipping lines considering or involved intermodal business
- Ports have been establishing railway container handling stations
- CRCTC / CR Intermodal are building 18 rail hinterland stations

National (intermodal) Port-Hinterland Policies: Belgium

- Intermodal often implies cross-border decision-making processes; in Belgium also different authorities: Inland waterway projects: regional level; railways federal matter; ports regional issue

- Combined transport short distances (Belgium) extremely expensive

- Royal decree : support railbased intermodal transport units (2009-2012). Subsidies earmarked combined transport € 100 million

- NARCON*: Belgian integrated solution traffic port Antwerp – inland terminals. Result: 200,000 trucks less on roads

- Major infrastructure initiatives: 'Liefkenshoektunnel' (tunnel Antwerp port area); second port extension Antwerp; revival Iron Rhine (railway Antwerp – German Ruhr area); modernisation railway infrastructure port Zeebrugge

National (intermodal) Port – hinterland policies: Germany

- Supporting measures (3): regulatory, tax policy, financial aid

- Masterplan Schiene Seehafen-Hinterland- Verkehr (Expantion rail connections in port & terminal sites; Block train concentrations; Joint IT systems among partners; various capacity increasing measures

- Several programmes to encourage services & infrastructure for intermodal transport

- Terminal evaluation criteria (4): relation competition neighbouring terminals; connections main railway network; economic feasibility; open access terminal infrastructure and services

- Transport Ministry slashed budget terminal grants half (€ 55 MLN) because of budgetary constraints (2010)

National (intermodal) Port-Hinterland Policies: **France**

- Increasing share of modes other than air and road from 14% to 25%

- Programme € 7 BLN 2009 – 2020

- Measures to take 2 MLN heavy trucks off French roads; 2 MLN tonnes C02 emissions

- Réseau Ferré de France (RFF): developing "freight-oriented network" with new hubs and larger structure gauge to boost piggyback trains on major European corridors. 2009: good results; load factor 73%

National (intermodal) Port-Hinterland Policies: Netherlands

- Ministry of Transport: Hub policy (memorandum on mobility, 2004)
- Possible policy shift due to current network bottlenecks : closer coordination policy initiatives ministry Transport + Economic Affairs + Department of Housing, Regional Development and the Environment
- Largest port-hinterland Infra investments: Maasvlakte II + Betuweline

MAASVLAKTE II. Source: Port of Rotterdam Authority

BETUWE LIJN. Source: Rail Cargo Information Netherlands

National (intermodal) Port-Hinterland Policies: Switzerland

- **Swiss Federal Constitution:** transalpine freight transport must be shifted from road to rail
- Switzerland expects high growth intermodal transit & import/export flows, especially where hinterland connections to and from seaports are concerned
- HUPAC: Swiss intermodal operator; terminal investments in port Antwerp. Also Swiss terminal investments in Italy

Gotthard Base Tunnel (2017). Referendum: USD 9 BLN !

Port-Hinterland Networks/Terminals: Germany

- Germany has dense network of terminals, unique in EU
- Terminals differ in size and services in relation to transport demand
- Strong focus on hinterland transport Hamburg/Bremen / Netherlands to hinterland

Port-Hinterland Networks/Terminals: France

- Port of Marseille has given its hinterland a new dimension
- The network connects Lyon, Duisburg, Strasbourg which are main combined transport hubs for the port

Port-Hinterland Networks/Terminals: Belgium

- Nation wide 23 terminals; 9 located in greater Port area
- It highlights importance of rail-based combined transport in Antwerp

Port-Hinterland Networks/Terminals: Netherlands

- Based on rail and barge connections, hubs on main corridors

- Hinterland connections to Venlo (southeast NL), Willebroek (Belgium), Duisburg (Germany), close links with terminals in Amsterdam and Avelgem (Belgium).

Network Combined Transport Operators (UIRR)
Alp crossing + maritime connections

- Combined Transport (CT): carriage of swap bodies, containers and semi-trailers
- Accompanied & Unaccompanied transport
- Environmental consciousness of Austria and Switzerland

Port-Hinterland ambitions: Shippers point of view (Procter & Gamble)

- 'TINA' (Trains, intermodal, a New Approach) was established aiming at boosting rail transport's share to 30% by 2015 from a starting position of 5%
- Use of Eurotunnel

Modal Share Ports

Radius containers handeled in port:

- ✓ Le Havre: 30 KM
- ✓ Antwerp: 50 KM
- ✓ Rotterdam: 150 KM

Modal Share Ports	Rail	Barge	Road
Rotterdam	11%	30%	59%
Antwerp	8%	32%	60%
Zeebrugge	45%	1%	55%
Le Havre	6%	7%	87%
Southampton	30%	0%	70%
Genoa	20%	0%	80%
La Spezia	30%	0%	70%
Marseilles (2006 containers)	12%	6%	82%
Dunkirk (2006 containers)	6%	4%	90%
Hamburg	30%	3%	67%
Bremen	53%	5%	42%

Table 3
Modal Share of the Ports
Source: Ports Website

Typical road ports:

- ✓ Genoa
- ✓ Le Havre
- ✓ La Spezia
- ✓ Dunkirk
- ✓ Marseille (2006)
- ✓ Southhampton

Typical rail ports:

- ✓ Hamburg
- ✓ Bremen
- ✓ Zeebrugge

Typical barge ports:

- ✓ Antwerp
- ✓ Rotterdam

('bi-lateral' rebalancing of containers)

Statements & Ambitions ...

“Antwerp has clear ambitions to cope with future growth; by targeted investments including hard and soft (IT) infrastructures, we want to achieve 40:40:20 modal split (road-rail-inland waterways)” (expressed by CEO of Port Antwerp, June 2010)

“Hamburg: rail hinterland traffic has proven as a stabilizing factor during crisis, therefore the Hamburg Port Authority increased rail share in container transport up to 27%. Investing millions of Euros in modernization and extension of its rail infrastructure every year, Hamburg aims to increase rail share and freight volume on an even higher level in the upcoming boom” (expressed by Port authority & HHLA, June 2010, EIA)

“French authorities are aiming for an increased share of modes ‘other than road and air’ from 14 to 25%, to be financed by a 7 BLN programme which we earmarked until 2020, while additional measures should take 2 MLN heavy trucks off French roads, which should drive down CO2 emissions by more than 2 MLN tones ». Expressed by Réseau Ferré de France, September 2009

“Rotterdam is targeting a rail share of 20% for Maasvlakte-II container terminals in 2035 (in 2008 the figure was 12.7%) and an inland waterway share of 45% (in 2008 it was 30.2%)” (EIA ‘Intermodal Yearbook 2010’ - Atlas)

EUROPEAN INTERMODAL ASSOCIATION

- ✓ To be published August 2010 'Intermodal Yearbook' (Atlas)
- ✓ www.eia-ngo.com

AMBROGIO INTERMODAL DAILY · P&G · TFG TRANSFRACHT · POLZUG GmbH · BERTSCHI AG · DÜRENTASCH · www.eia-ngo.com

AMBROGIO – DB NETZ – EUROGATE – ECT – HHLA – HUPAC – ICF

Port of Antwerp, Hamburg, Marseilles, Réseau Ferré de France