



WESTERN BALKAN INTERMODAL STUDY

SUPPORT TO THE TRANSPORT DIMENSION OF THE SEE 2020 STRATEGY

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In the framework of further developing an efficient South East Europe Transport Observatory (SEETO) Comprehensive Network and strengthening integration and complementarity among the modes of transportation and transport logistic chains in the SEE, Regional Cooperation Council (RCC) Secretariat is appointed City Net Scientific Research Center Ltd. for the assistance in the implementation of project SEE 2020 – Jobs and Prosperity in European Perspective, in the area of transport under the Sustainable Growth pillar of the Strategy.

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INTRODUCTION

The need to enhance intermodal operations in the SEE is widely recognized to be essential to encourage economic development and job creation.

The favourable transit position of the region and well developed SEETO Network offer great potential for the development of intermodal transport, both internally among the countries and internationally.

The main problems that the development of the intermodal transport in SEE region is facing refer to the following issues:

- Institutional issues
- Planning process
- Operational issues
- Lack of infrastructure facilities
- Economic constrains
- Tariff policy issues
- Awareness issues
- Policy questionnaires and check-lists



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THE OVERALL OBJECTIVE

Contribution to the long-term sustainable development of the logistics infrastructure and multimodal transport in SEE region

- Integration of all transport sectors
- Increasing the possibility to ensure cargo mobility
- More efficient application of means of transport, the quality of logistics and related services
- Improving the attractiveness and competitiveness of the whole region
- Making a better use of national and regional resources
- Reducing cargo carriage costs as well as environmental impact of heavy duty vehicles

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THE SPECIFIC OBJECTIVES

- Understanding market requirements
 - Assessment of the major international trade lanes for target markets
 - Highlighting the challenges for implementing competitive intermodal services versus road transport
 - Revealing the fundamental service requirements of forwarders – and shippers – towards intermodal services for each target market
 - Identification of the type of intermodal equipment (loading units) employed
- Developing "Roadmap on intermodal transport" for each of the respective SEETO Regional Participant
- Identifying the main logistic corridors and designing measures for better corridor management and the development of intermodal transport chains in SEE countries for better accessibility and transparency of intermodal services among each other and towards (potential) customers and shippers
- The exchange and dissemination of success stories and best practices among market parties
- Promoting intermodal transport as such during the whole lifecycle of the project

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PROJECT STAKEHOLDERS

This project involves a considerable number of stakeholders at international, national and sub-national level:

- RCC (contracting authority)
- SEETO Secretariat and SEETO Regional Participants' Ministries of Transport
- Railways companies, transport operators and Port Authorities
- Forwarders and Logistic companies
- Business community
- EU Delegation offices in WB region

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THE PROJECT SCOPE

1. Development of a transport demand and supply assessment model
2. Assessment of the main logistic corridors/routes on the SEETO Comprehensive Network
3. Gap assessment analysis of the main logistic corridors of the SEETO Comprehensive Network
4. Identification of potential efficiency-enhancing measures as well as certain infrastructure measures (e.g terminals)
5. Development of Study on Intermodal Transport for SEE following the principles of integration and complementarity among the modes of transportation

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CURRENT STATE - INFRASTRUCTURE

In existing situation in the SEETO region, it was identified a total of 42 locations where there is a 46 multimodal facilities. Fifteen facilities have attributes of intermodal terminals. 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 neighbouring state of Bosnia and Herzegovina. For this reason, it is taken into account in the analysis in this study));
- Two-terminals - type "RIVER-ROAD-RAIL TERMINALS" (Port of Belgrade-Serbia, Port of Novi Sad-Serbia);
- Six terminals - type "RAIL-ROAD TERMINALS" ("Intereuropa RTC" - Alipašini 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 Dobrovo (Miradi)-Kosovo*, Logistics Centre Belgrade ZIT-Serbia).

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THE MAIN PROJECT CONCLUSIONS

➤ The largest container traffic in the period 2004-2013 was achieved in the Port of Durres. In this port container traffic is constantly growing in the reporting period (2013 - 109,055 TEU). Port of Bar and Port of Ploče achieve the largest container traffic in 2008 (43,708 TEU, 35,124 TEU, respectively). From 2008 to 2013, container traffic generally was constantly declining or stagnating. Currently, all three terminals have equipment and capacities that allow transhipment 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).

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THE MAIN PROJECT CONCLUSIONS

➤ 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.

➤ Previous conclusion is in accordance with the findings of other relevant studies, e.g. DB, VVC, via Donau (2011) claimed the same for Bosnia and Herzegovina and estimated its containerisation potential at 70,000 TEU in 2005 and 63,000 TEU in 2006.

➤ 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 this region.

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POTENTIAL EFFICIENCY-ENHANCING MEASURES

1. Legislative, regulatory and administrative measures
2. Organizational measures and activities for improving of intermodal transport
3. The measures and activities of technical and technological improvement of intermodal transport
4. Monitoring system, IT equipment and support
5. The measures and activities for improvement of infrastructure for intermodal transport
6. Human resources

The direct and indirect factors that can significantly influence on development of intermodal transport in the SEETO region:

- The political stability and interregional cooperation in the SEETO region
- EU accession date of SEETO regional participants
- Macroeconomic development and stability in the SEE regional participants and their neighboring countries
- The development of the various industrial branches and regions, the extent of attracting foreign investment etc.

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THE PILOT ACTIONS

Expected impact due to the future pilot actions 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.

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