

DANUBE BLACK SEA REGION IN A NUTSHELL

Challenges and Potential of the Danube – Black Sea Region

White Paper “Roadmap to a Single European Transport Area”

- Transport is fundamental to economy and society and enables economic growth and job creation.
- BUT, the growth target must not compromise the challenging ambitions to reduce emissions and negative environmental impact.

White Paper “Transport 2050 Roadmap”

- Freight transport activity is projected to increase by around 40% in 2030 and by little over 80% by 2050.
- European Commission set the objective to shift 30% of road freight transport over 300km to environmental friendly means of transport (rail, ship) until 2030 (50% until 2050)

General Framework (2)



During the last TEN-T revision-process the most important European ports have been clustered to “Multi-Port Gateway Regions” (MPGR)

Activities of the Working Group of the Danube Countries

- Memorandum of Understanding supported by the stakeholders in the Black Sea region
- **Danube-Black Sea cooperation Baseline study** (by Lower Austria in cooperation with all signatories) **highlighted development and cooperation possibilities for the Black Sea ports**

Project-Output SEE-Programme 2007-2013: DaHar

- Developed a strategy for the Danube's inland waterway ports
- Master Plans and Action Plans

Workprogramme Baseline-Study

Basic research

SWOT

Recommendations

Economic development and trade
in the DBS-Region

Western Black Sea ports as main-
gateway to Central Europe

Transportation system as major
factor for further development

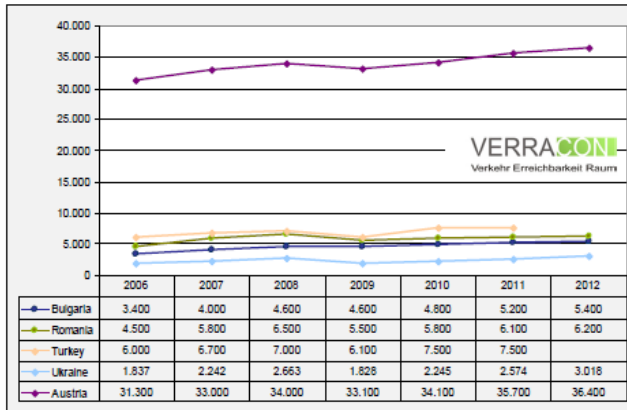
Port cooperation

Transport masterplan

Project concept for Danube
Programme

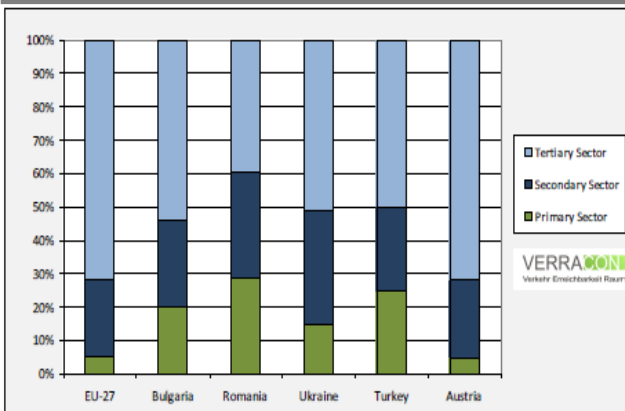
Spotlights on economics and trade

Economic development and trade (1)



GDP per capita in the West. Black Sea Region

- WBS-Countries generally have a low GDP per capita
- Austria's GDP per capita averages over 35,000€, in the WBS-Countries the largest number is 7,500€.
- The WBS-Countries have high capacity to catch up.
- From 2006 to 2012 the Austrian per capita GDP has increased about 16%, while the GDP growth in the WBS-Countries ranges between 25 and 65%.
- The largest growth is recorded in Ukraine.

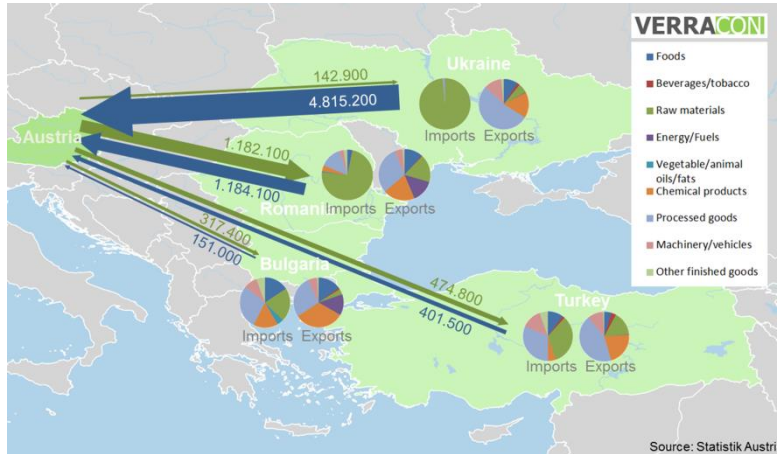


Working population in economic sectors

- Austrian shares are close to the EU-27-average
- In WBS-Region the agricultural sector plays a prominent role, esp. in Romania.
- In WBS-Countries the share of people employed in the primary and secondary sector is about 50%
- In Ukraine the secondary sector (with 34%) is very prominent.
- The shift to a service economy is still ongoing

Economic development and trade (2)

Import/Export of goods between Austria and the BS-region (tonnes)



Ukraine: highest exchange of goods, extremely unpaired ratio of Imp./Exp., almost entirely export of raw materials

Romania: high exchange of goods, balanced ratio of Imp./Exp., high amount of raw materials in import, diversified export

Turkey: minor exchange of goods, balanced ratio of Imp./Exp., diversified import and export

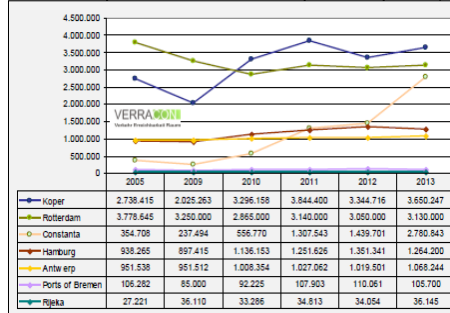
Bulgaria: least exchange of goods, double amount of exports, diversified import and export

Koper is most frequently used seaport.

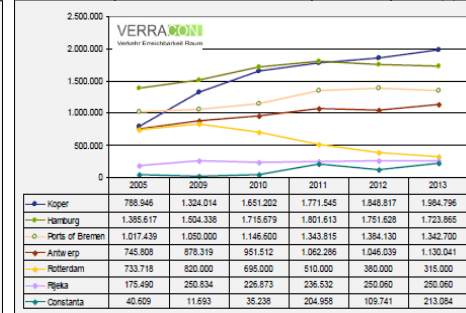
Rotterdam is on 2nd place.

Constanta is the third most important port for Austrian imports, ahead of Hamburg. The increase derived mainly from the rising coal imports for Austrian industry from overseas.

Austrian imports via the main European sea ports (t)



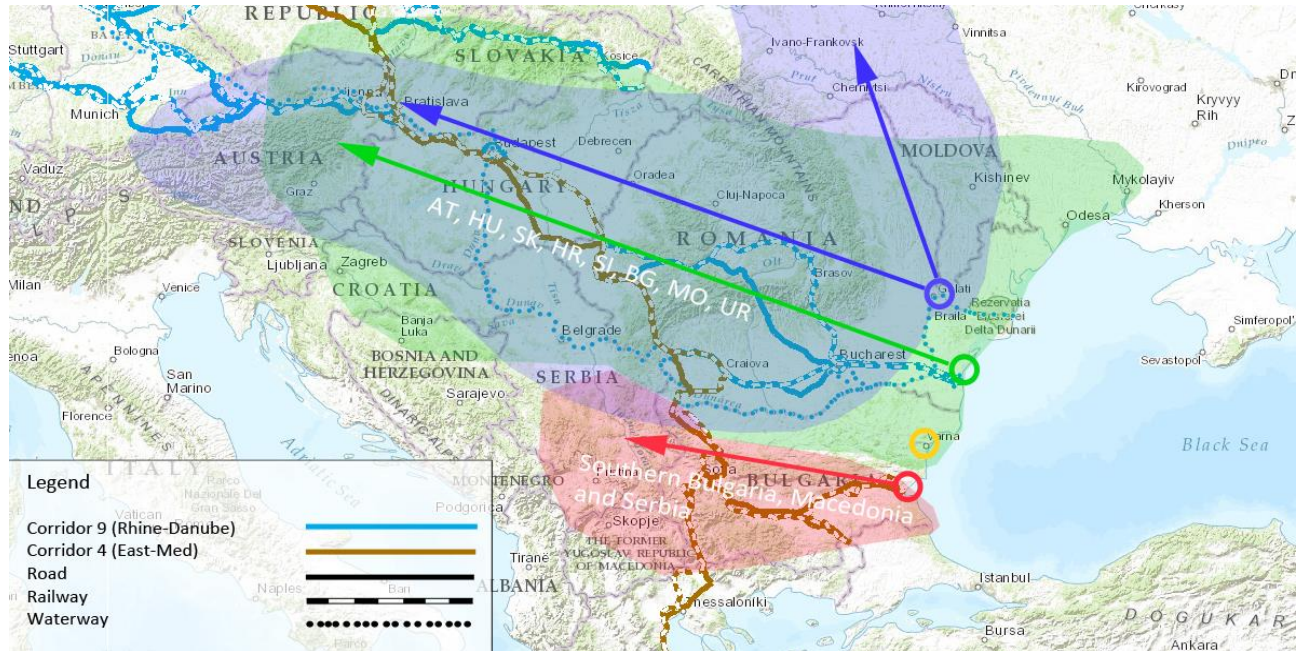
Austrian exports via the main European sea ports (t)



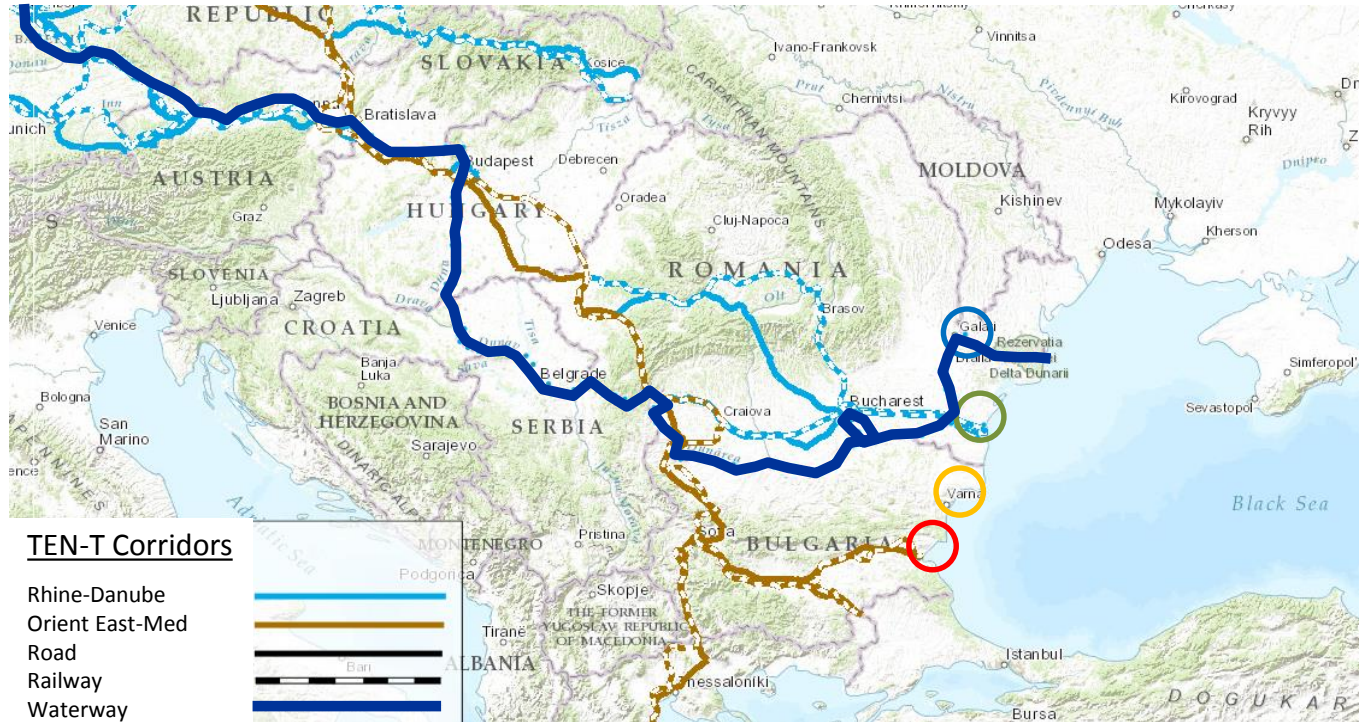
Issues of infrastructure and transportation

WBS-Ports as Main-Gateways to CE

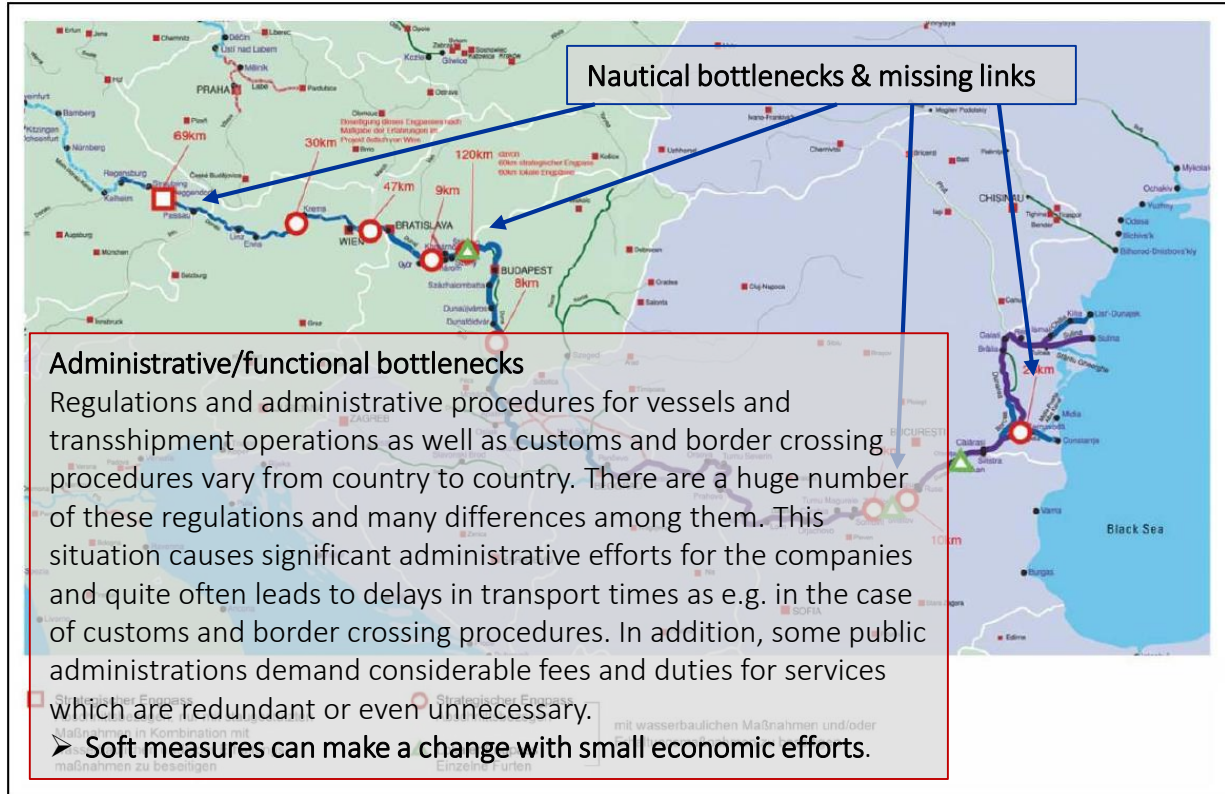
The transport system between the Black Sea region and the Danube region establishes the gateway-function. Particularly the landlocked countries Austria, Czech Republic, Slovakia and Hungary are **the international port hinterland** .



TEN-T Corridors in the DBS-Region



Bottlenecks - Inland Waterways

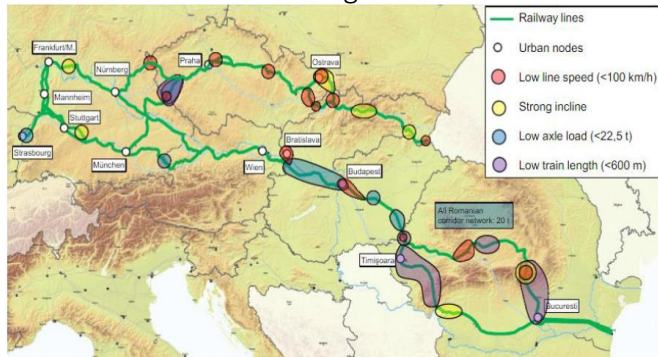


Bottlenecks – Rail & Road

RAIL: Areas with insufficient rail line equipment



RAIL: Areas with critical alignment



RAIL: Areas with high line capacity utilisation





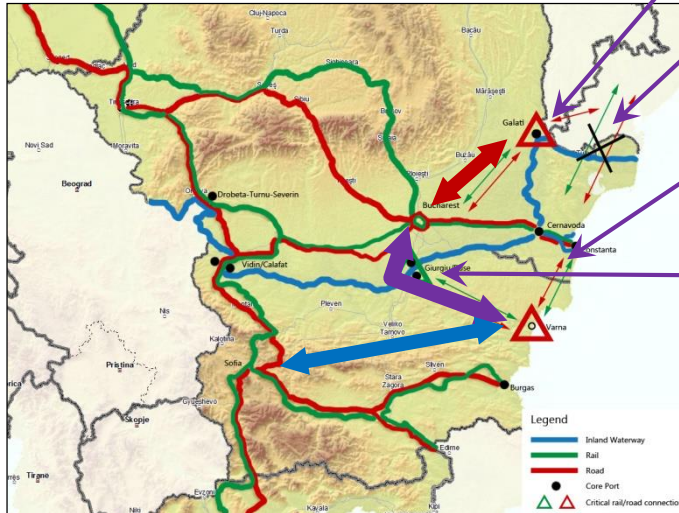
ROAD: Critical road conditions and missing links



Critical cross-border and port connections concerning rail- as well as road infrastructure

Missing highway connection to the TEN-corridors:

- Galati - Bucharest(RO) 
- Varna - Sofia(BG) 



Galati(RO) – Ukraine - Moldova: non-electrified narrow gauge railway

Cross-border-section Tulcea(RO) – Izmail(UA): Missing 20km intersection due to topographical difficulties

Sindel(BG) - Negru Voda(RO) – Medigia(RO): line is not electrified and only of regional importance

Bridge Giurgiu(RO)-Russe(BG): critical infrastructural conditions

Main bottleneck is connection Varna(BG) -Russe(BG) - Giurgiu(RO) – Bucharest(RO): critical infrastructural conditions and critical alignment (speed)

Black Sea ring highway

- Black Sea Ring Highway project envisages a four-lane ring highway system
- 7,700 km long and connects the Black Sea states with one another.
- MoU on the Coordinated Development was signed in 2007
- Route should run via main cities in a circle with branches leading to important surrounding areas
- Turkey and Greece have finished the construction in their territories
- Other countries struggle because of missing political will and financial resources
- Besides that the public opinion in some countries is against the highway plans.



SWOT of the region

WEAKNESS
current level of
infrastructure
development and
logistics
performance not
sufficient

OPPORTUNITY
Gateway between
Central Europe,
the Caspian
region and the Far
East

THREAT
raising of
road
transport
figures

STRENGTH
Rising
transport
demand
opening new
markets

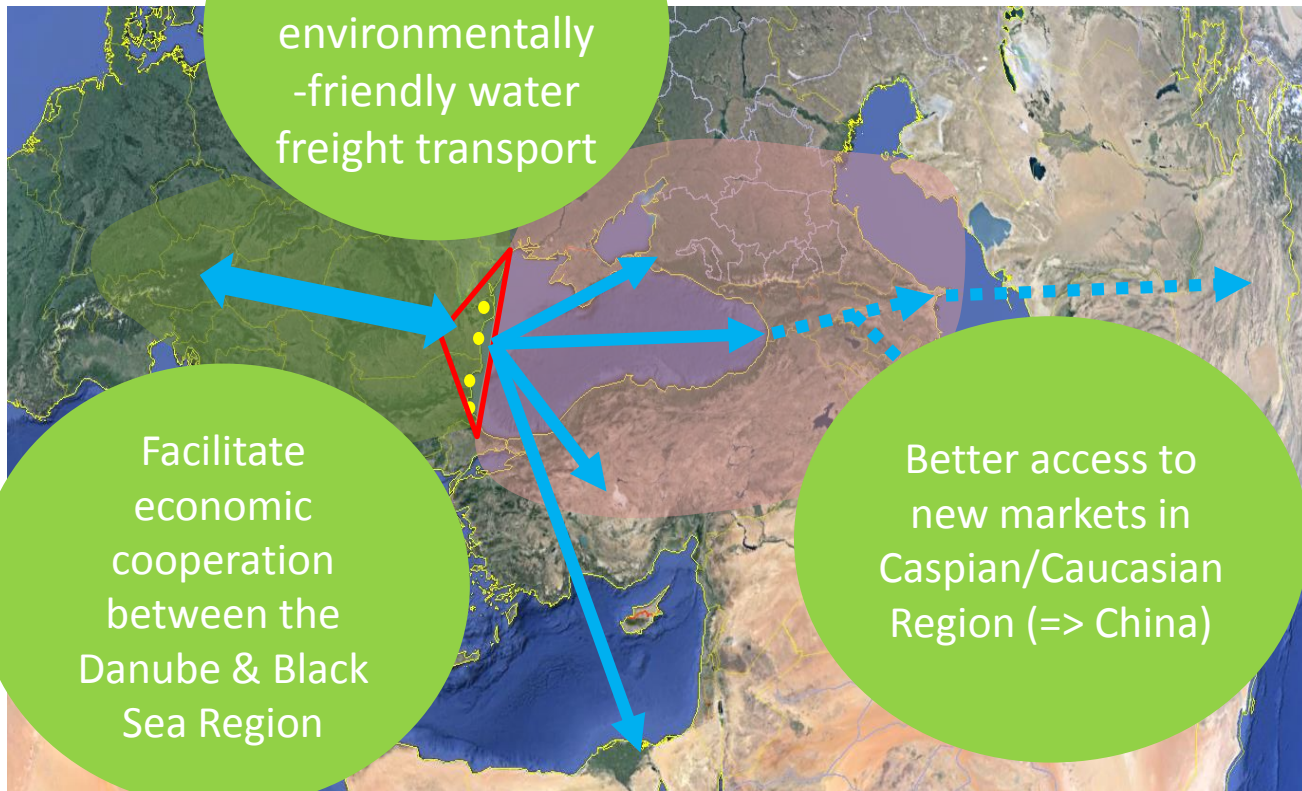
Challenges and potentials

DBS Gateway Region

Gateway for sustainable and environmentally friendly water freight transport

Facilitate economic cooperation between the Danube & Black Sea Region

Better access to new markets in Caspian/Caucasian Region (=> China)



Transport System/Corridors

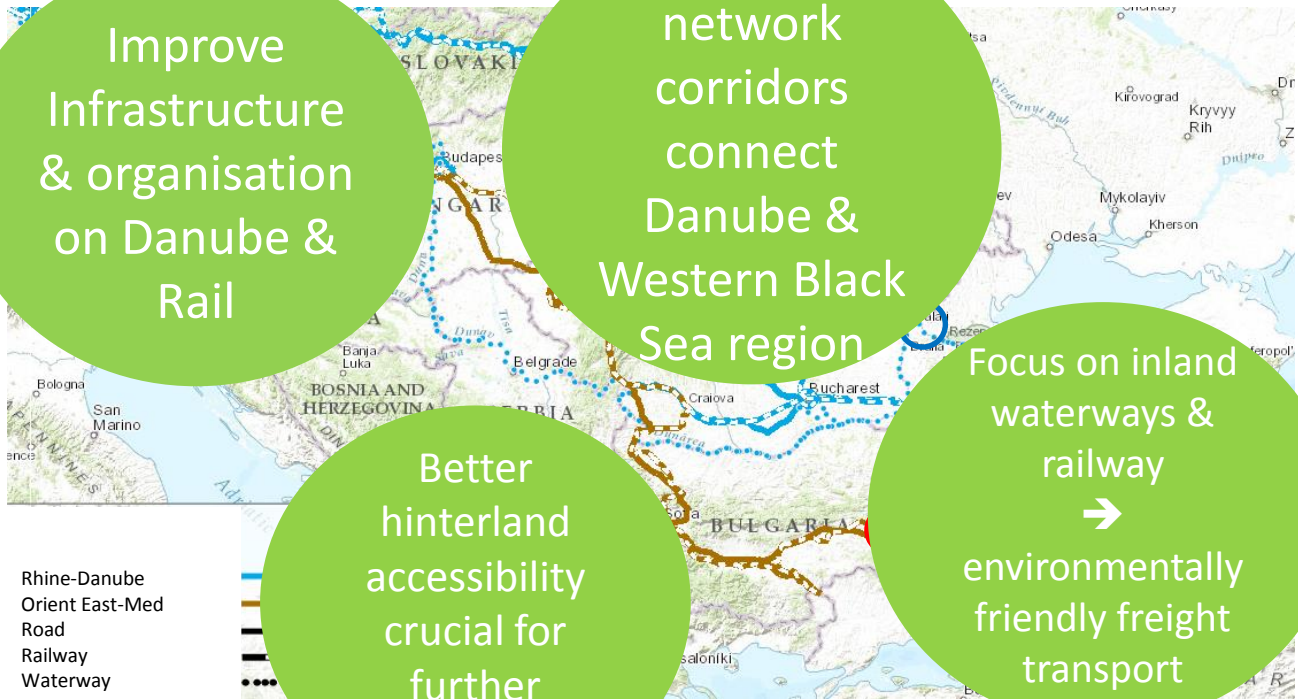


Improve
Infrastructure
& organisation
on Danube &
Rail

Two core
network
corridors
connect
Danube &
Western Black
Sea region

Focus on inland
waterways &
railway
→
environmentally
friendly freight
transport

Better
hinterland
accessibility
crucial for
further
development



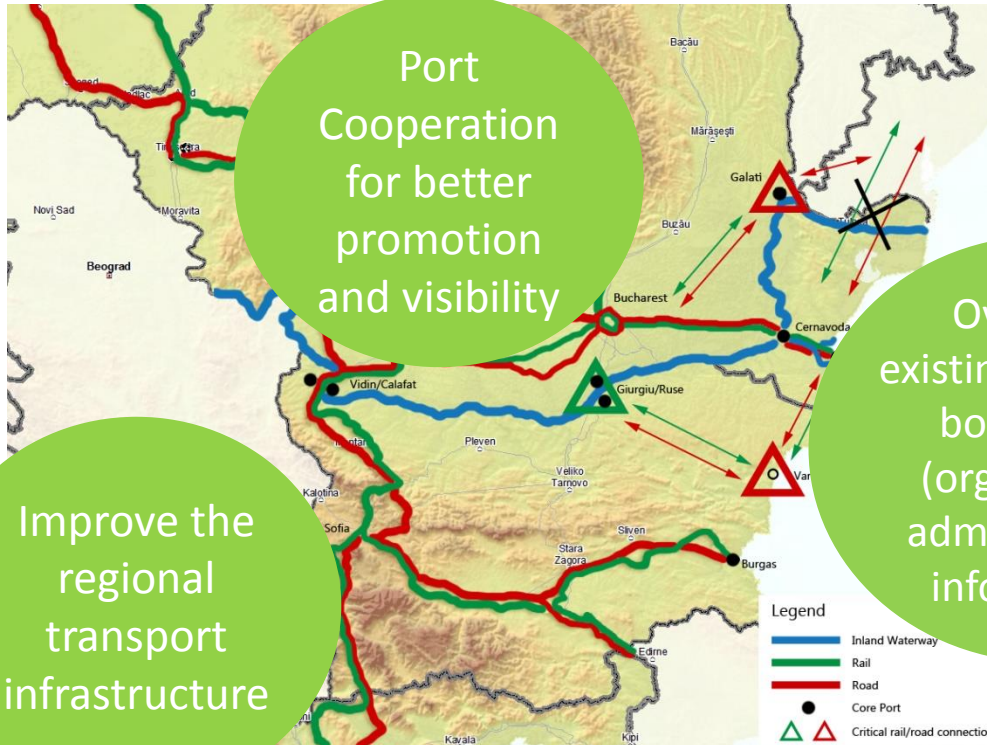
Rhine-Danube
Orient East-Med
Road
Railway
Waterway

W. Black-Sea-Ports & Regions

Port
Cooperation
for better
promotion
and visibility

Overcome
existing functional
bottlenecks
(organization,
administration,
information)

Improve the
regional
transport
infrastructure



Danube Ports & Regions

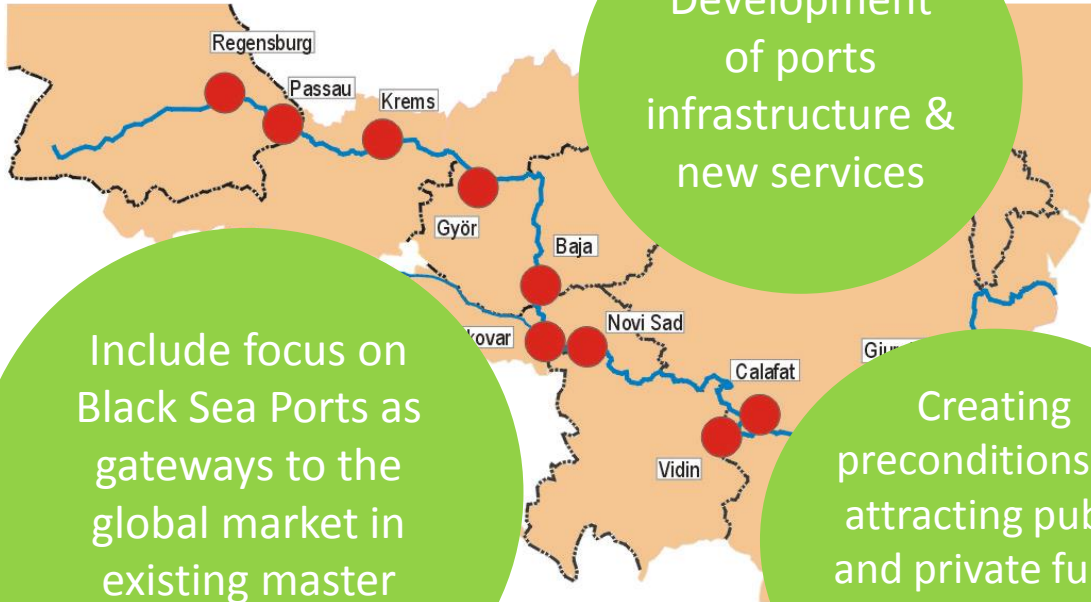
Provide appropriate services along the whole transport chain

Develop Regional Action Plans to maximize the benefits for ports and regions

Ports as intermodal nodes to connect the hinterland



Danube Ports & Regions



Development
of ports
infrastructure &
new services

Include focus on
Black Sea Ports as
gateways to the
global market in
existing master
plans

Creating
preconditions for
attracting public
and private funds
for investments in
infrastructure

Thank you for your attention!