Danube Ports Policy Day

« Do we need a one-size fits all? »

Budapest, 18 October 2017

Alexander van den Bosch, EFIP Director

European Federation of Inland Ports

European Federation of Inland Ports

- Was created in 1994
- Represents over 200 inland ports in 16 countries of the European Union, Switzerland, Serbia and Ukraine
- Types of membership: full member, observers and supporting member
- The unique voice of inland ports in Europe
- An important information network for and about inland ports
- A “promoter” of inland ports

Cooperation= changing the game…

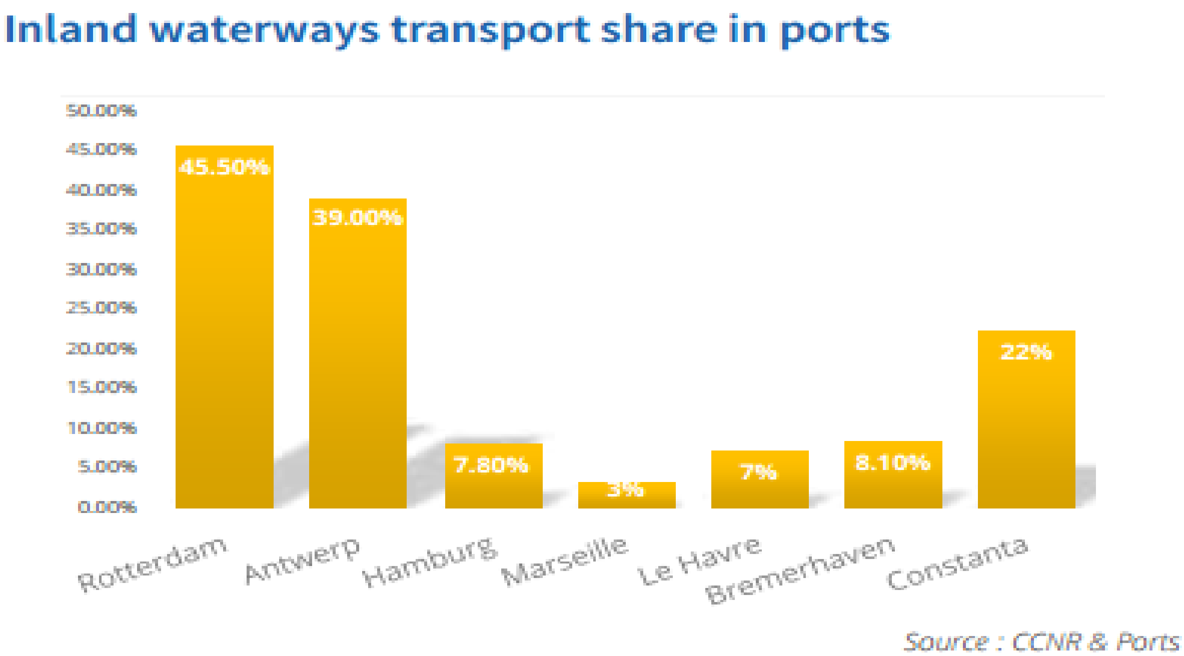
- Cooperation possibilities in the public debate for decades!
- Halt in throughput volumes (containers) favors the discussion of alternative port development
- Collapse of container shipping volumes in 2008/2009 confronted the market with new challenges (no capacity increase need)
- To ensure public investments, cooperation seems a solution to take advantage of potential synergy effects

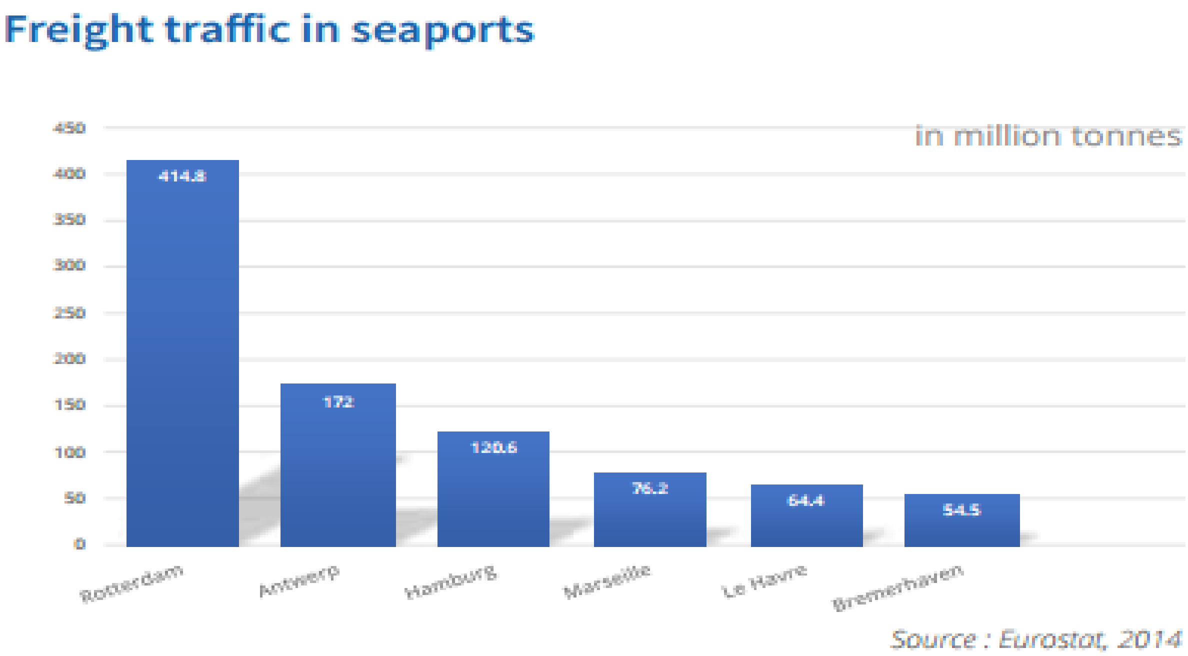
Positive effects of port cooperation

- Reduction of investment needs
- More efficient usage of port infra and superstructure
- Better utilization of hinterland transport modes through increasing rail and barge transport frequency
- Better streamlining of traffic peaks
- Reduction of costs for maintenance
- Increased flexibility regarding workforce through personnel exchanges

Triggers for cooperation…

- 60% of IWT = maritime related





Modal share
Ghent: 50%
Amsterdam 44%

Hinterland container transport

Rotterdam and Antwerp: seaborne

235 MT in 2013

400 MT expected in 2030 in Benelux scenario, 325MT in OECD scenario

Modal shift: 2013 - 2030

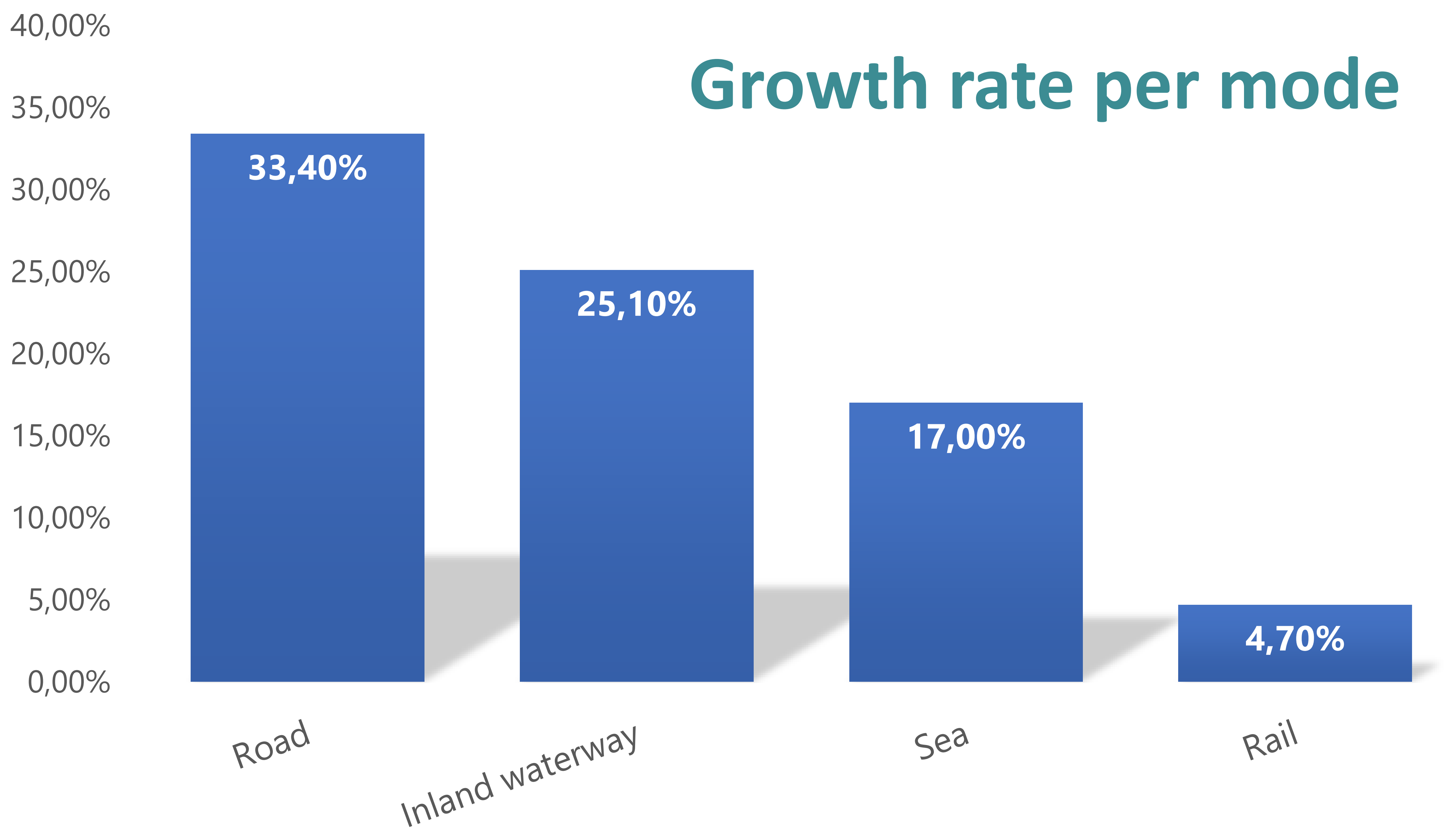
Mode	Antwerp	Rotterdam
Road	56% → 43%	55% → 35%
Rail	9% → 15%	11% → 20%
IWT	35% → 42%	35% → 45%

Rotterdam and Antwerp: IWT

82.25 MT in 2013

180 MT expected in 2030 in Benelux scenario, 142MT (OECD scenario)

Source: Benelux and OECD , ECA


Growth rate per mode
40,00%
35,00%
30,00%
25,00%
20,00%
15,00%
10,00%
5,00%
0,00%
33,40%
25,10%
17,00%
4,70%
Road
Inland waterway
Sea
Rail

Some examples:

Rheinports and Port of Basel

New NEAT Cotthard tunnel boost for inter-port cooperation

- Need to channel goods and create high capacity trimodal infrastructure along the Rotterdam-Basel-Genoa corridor: Trimodal Gateway Basel Nord Container terminal, 6 September 2016
- Leading to cooperation with Port of Rotterdam to cooperate on vessel registration for container traffic (port community system) and promoting LNG and GTL
- RheinPorts Basel-Mulhouse-Weil RheinPorts Information System (RPIS) based on Antwerp's Barge Traffic System (BTS) from 6 May 2015

...

EFIP
European Federation of Inland Ports

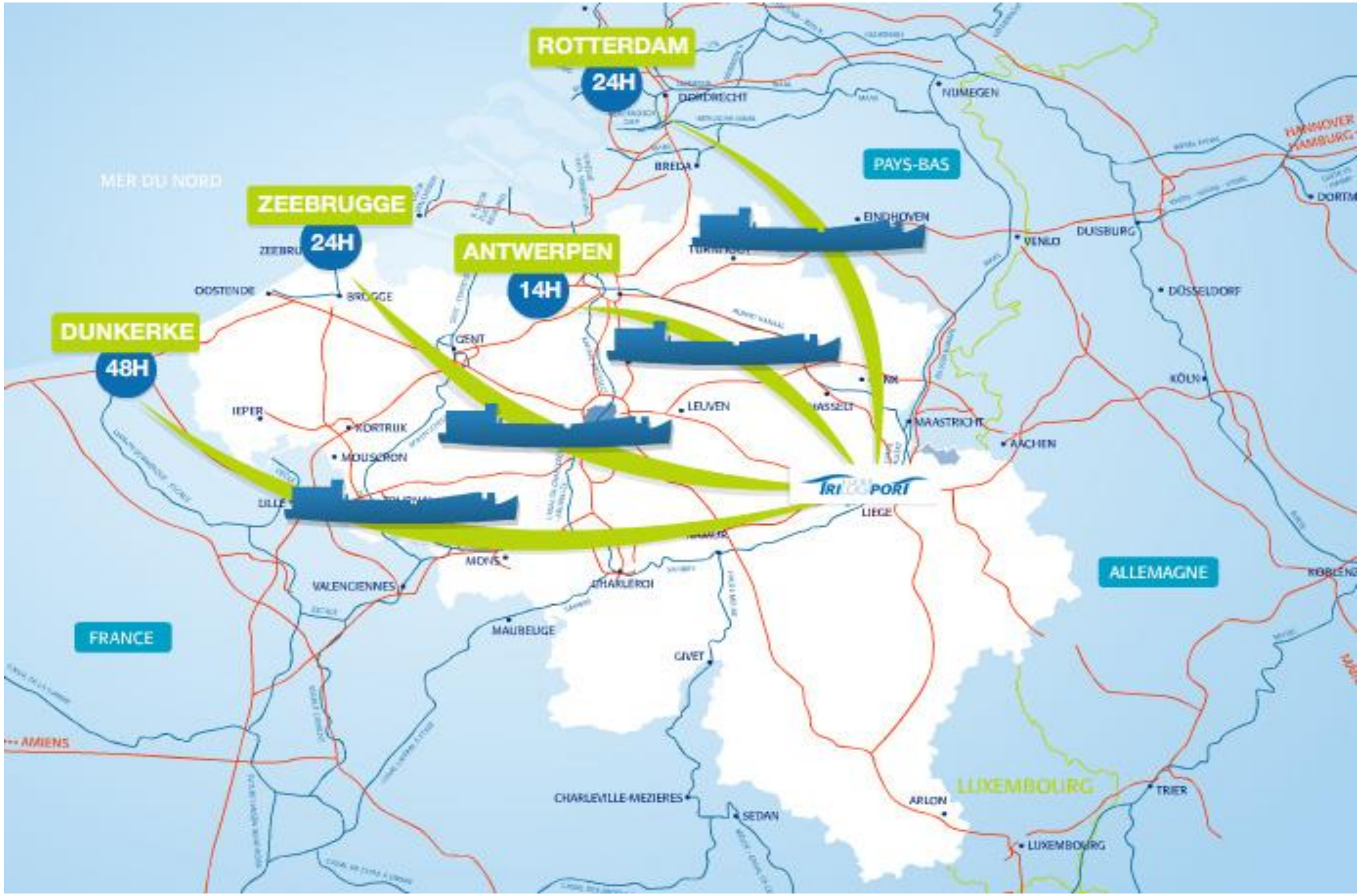
Port of Antwerp- Port of Liège

2006: **Common Economic Interest Group** (GIE) for the development of the new multimodal platform Trilogiport

Sept'2011: Memorandum of understanding

- Direct contact between the port of Antwerp and the shippers (clients) in the Liège region
- Participation of Liège in certain projects of the port of Antwerp (new technologies,…)
- Common communication

Nov' 2015: Official inauguration of Trilogiport



European Federation of Inland Ports

Smart Logistics Centre-Venlo

- Cooperation between the province of Limburg, port of Rotterdam and Smart Logistics Centre Venlo (Sept. 2015)
- Strengthen the logistic corridor Rotterdam – Noord-Limburg
- Initiating phase: sharing data and information of all logistic actors in the chain
- Key hub function to the hinterland (Ruhr area) – strenghening the position of the Port of Rotterdam
- Answer to congestion and logistic density in West of the Netherlands

In the end: a win-win situation…

Bundle cargo

- Need to consolidate cargo and to match freight flows (return load / import and export) in order to reach a volume suitable for barge
- Linear economic perspective (TEN-T corridor approach)

Digitalisation of logistics

- Interconnectivity and interoperability of inland port operating systems for data services and cargo bundling in sea and land transport modes and nodes

Specialise and linking port community systems

- Between inland ports: Upper Rhine Ports, Saechsische Haefen
- With sea ports: HaRoPa, Ghent-Terneuzen, Venlo, Trilogiport…

Costs

Transhipment costs: additional transhipment and pre-/ end haulage operations result in higher door-to-door costs compared to direct road haulage, <u>in particular on short distances</u>.

EFIP
European Federation of Inland Ports

The challenges faced by inland ports today…

Require a co-operative approach not a competitive approach…

TRENDS IN DEMAND FOR TRANSPORT IN 2017 IN RHINE COUNTRIES

Source: CCNR

	Main driver(s)	Trends in demand for transport in 2017
Agricultural products	Harvest results	Decrease (1st semester) & Increase (2nd semester)
Iron ores	Steel production	Stagnation
Metals	Steel production	Stagnation
Coal	Weather & energy policy, partly steel production	Decrease
Sand, soil & building materials	Construction activity	Increase
Containers	World trade	Increase
Mineral oil products	Oil prices & refinery output	Decrease
Chemicals	Chemical production	Increase

Adapting is surviving

Thank you!