

European Commission

DG MOVE - Directorate B

STUDY ON SUPPORT MEASURES FOR THE IMPLEMENTATION
OF THE TEN-T CORE NETWORK RELATED TO SEA PORTS,
INLAND PORTS AND INLAND WATERWAY TRANSPORT

Lot 1: Assessment of market potential for inland ports and IW business

Port Forum 11/12/2017

CONTRACT No. MOVE/B3/SER/2015-224/SI2.721484



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Agenda



1. Scope & tasks of the project

2. First results

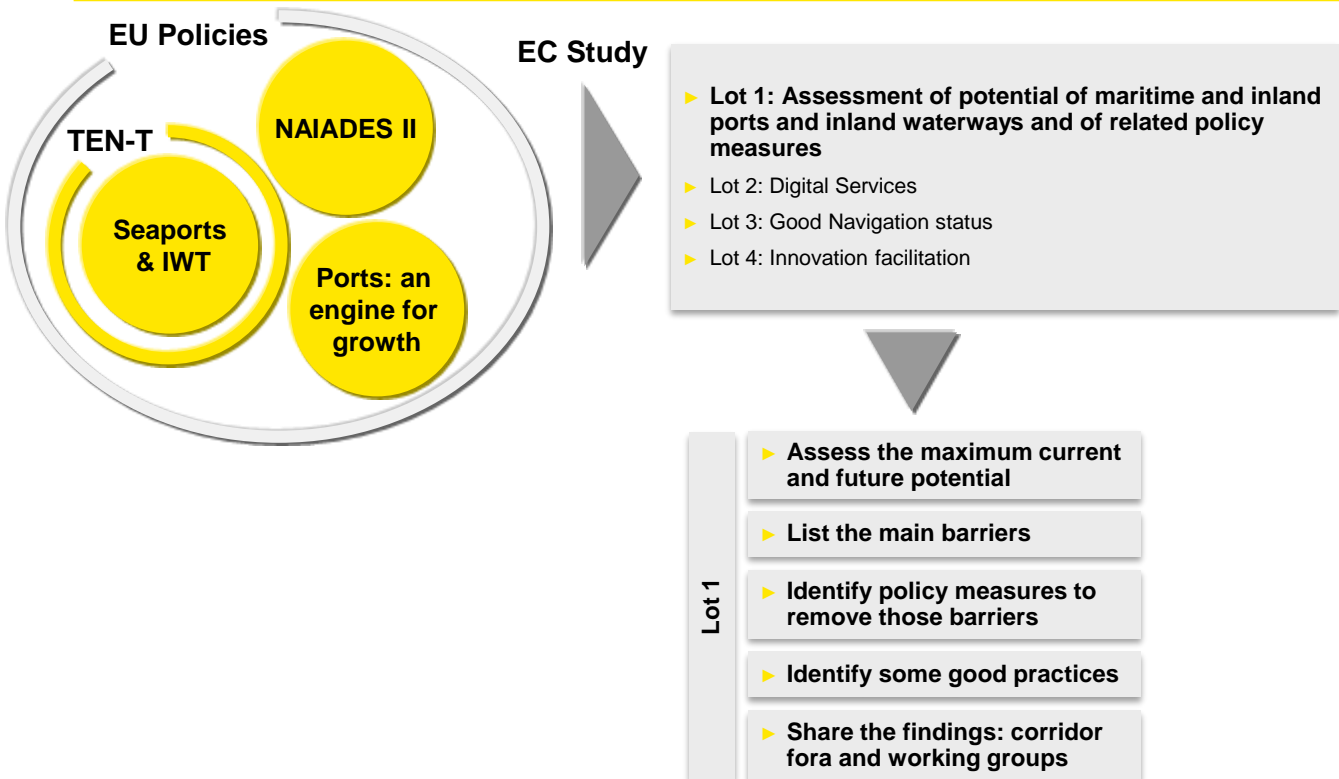
3. Next steps

4. Discussion

1. Scope & tasks of the project



1. Scope & tasks of the project



Progress of the study

Final validation stage

Work in progress

Next step

1 Critical review of the current situation

- ▶ Analysis of major developments
- ▶ Analysis of transport and logistic needs
- ▶ Traffic forecast – baseline scenario
- ▶ Industrial strategies
- ▶ Assessment of existing industrial development and clustering strategies

2 Design of policy scenarios

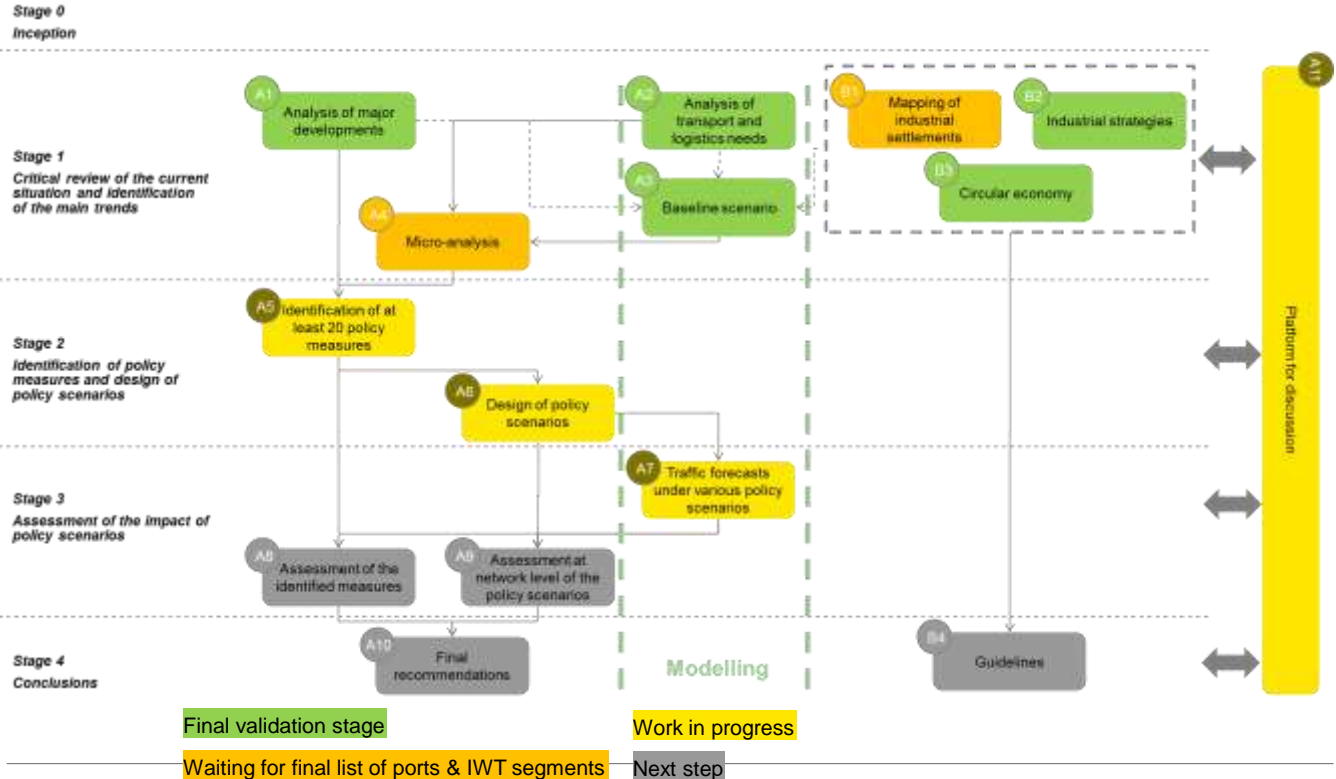
- ▶ Identification of 20 policy measures
- ▶ Design of policy scenarios

3 Assessment of their impact

- ▶ Traffic forecast
- ▶ Assessment of the identified measures
- ▶ Assessment at network level of the policy scenarios

Support to EU policies: TEN-T corridors, NAIADES II, Ports: an engine for growth

Progress of the study



Stakeholders have shown a strong interest in the project

Sector association

- ▶ INE 26/11/2017
- ▶ Port Director Malta 27/03/2017
- ▶ ESPO Civitavecchia 28/04/2017
- ▶ Port Forum 11/12/2017
- ▶ ESPO workshop 12/12/2017
- ▶ Events with inland waterways to be organized in the coming weeks

Written discussion

- ▶ Discussion paper on scenario disseminated on the 12/04/2017
- ▶ More than 60 comments collected
- ▶ Detailed answers and additional information provided on November the 7th
 - ▶ Appendix on the modelling tool
 - ▶ Appendix on the assumptions on costs
 - ▶ Appendix on continental containers

2. First results

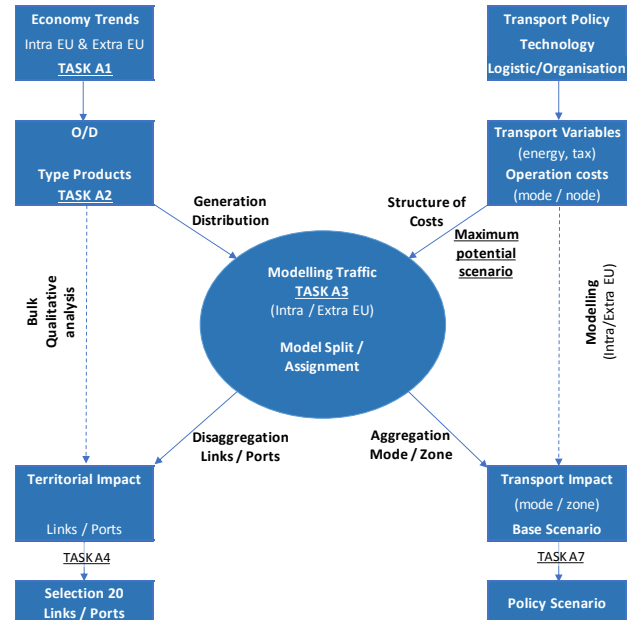


Applications on the container market and PortPrint – model architecture

Methodology

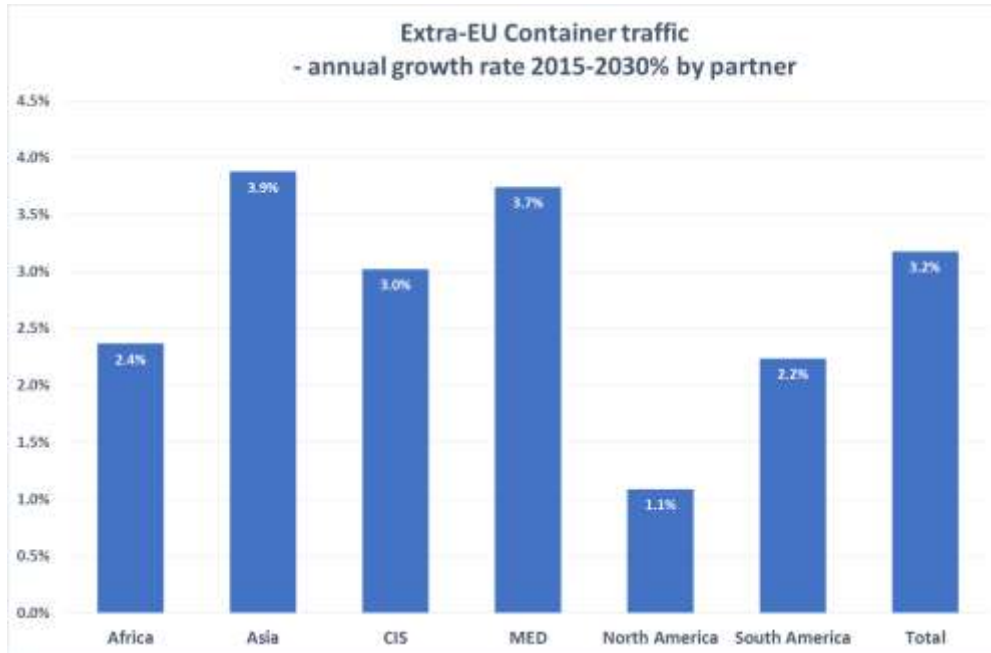
A3 – presentation of the results of the modelling tool:

- ▶ Detailed Policy assumptions and Methodology
- ▶ Demand generation: two separate matrix
- ▶ Portprint model
 - ▶ Generation & Extra-Eu matrix
 - ▶ Port choice model
 - ▶ Modal share
 - ▶ Assignment
- ▶ Progress on the bulk



Applications on the container market and PortPrint model – generation module

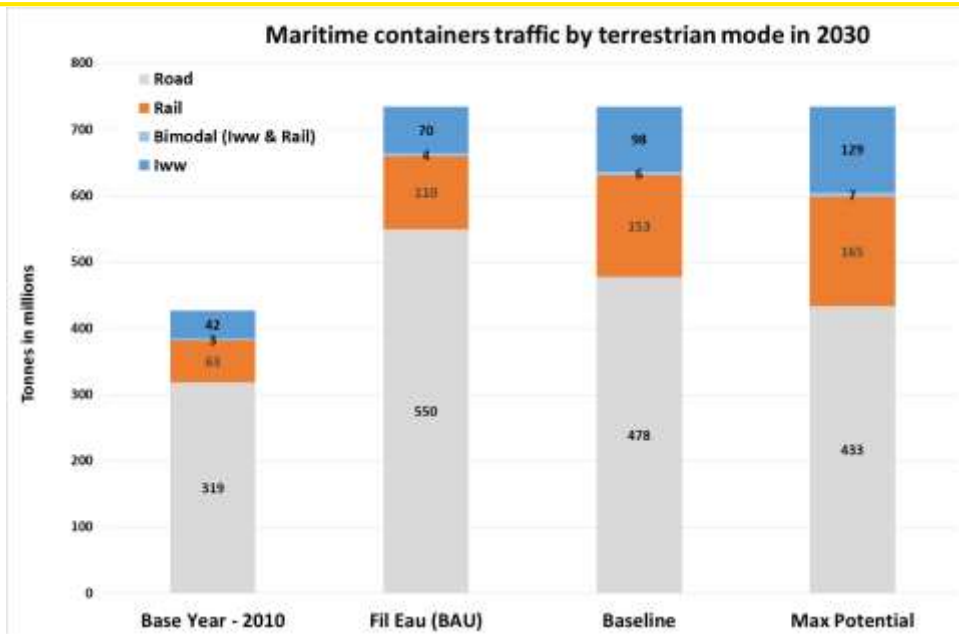
Results – Growth rate by partner



Definition of scenarios

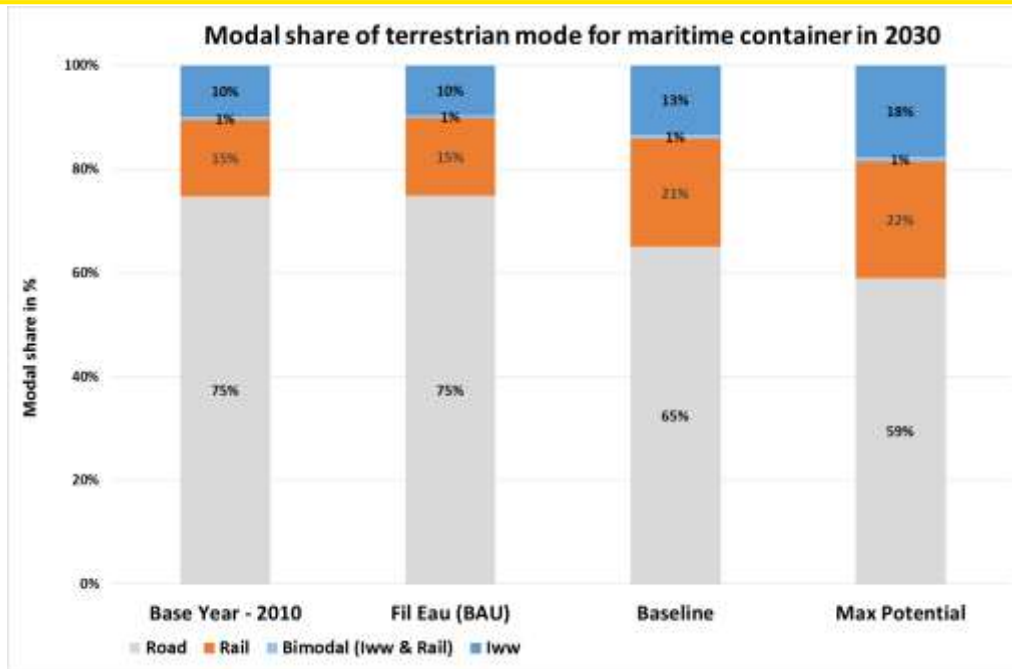
#	Scenario name	Infrastructure	Costs	Comments
S0'	Business as usual	No TEN-T	2010	Required for modelling: just demand growth
S1	Baseline	TEN-T	Baseline	Infrastructure projects on TEN-T included + evolution of transport costs
S2	Maximum potential	TEN-T	Max potential	Alternative set of assumptions on transport costs with strong improvement of IWT performance (and also rail)

Results on maritime container market – in tons



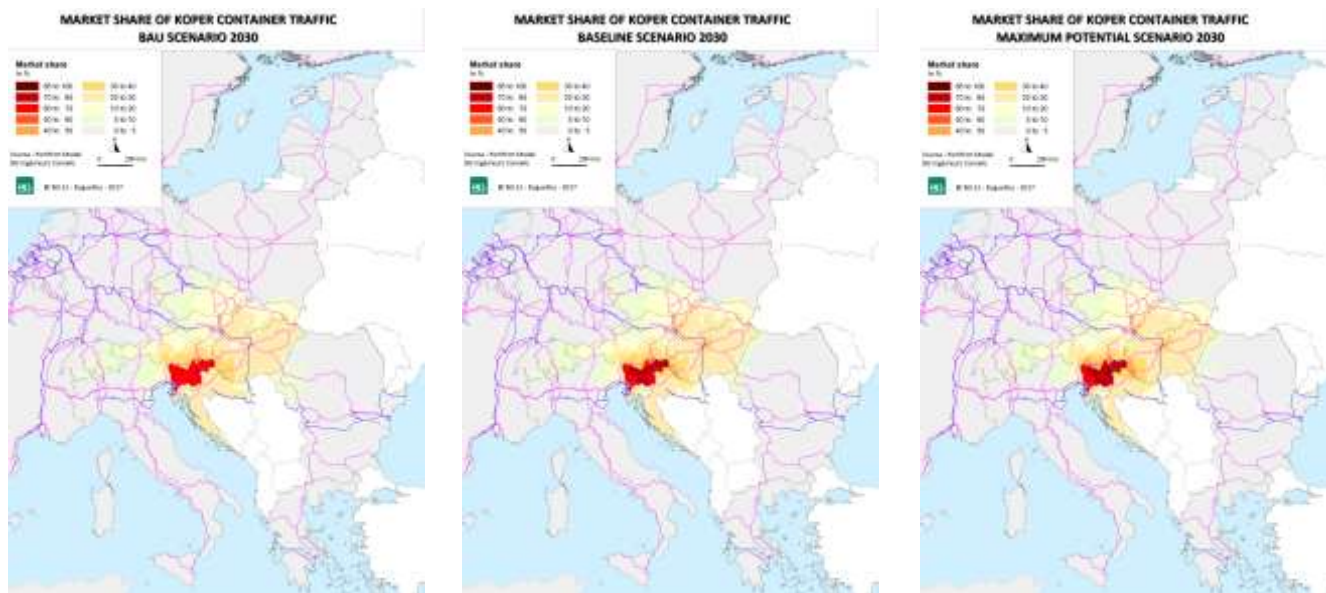
- ▶ Increase of the total market by 70% between 2010 & 2030 with:
 - ▶ x 2,3 for IWT traffic between 2010 & Baseline Scenario 2030
 - ▶ x 3 for IWT traffic between 2010 and Max Potential Scenario 2030

Results on maritime container market in modal share



- ▶ The total share of IWT is 10% in 2010 & 2030 (BAU), 13% in baseline scenario and 18% for maximum potential scenario.

Results on maritime container market



BUSINESS AS
USUAL 2030



BASELINE 2030 Infrastructure
projects + trend on costs



Max Potential :
improvement of IWT & rail

Results on maritime container market



BUSINESS AS
USUAL 2030

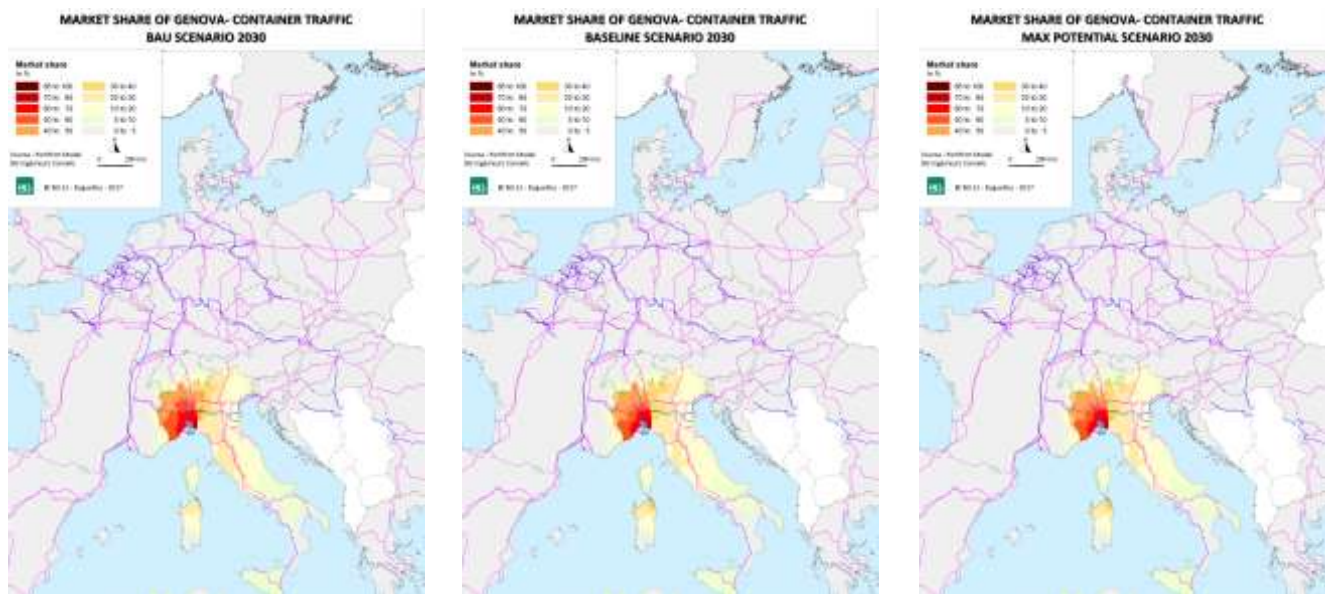


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BASE YEAR 2010

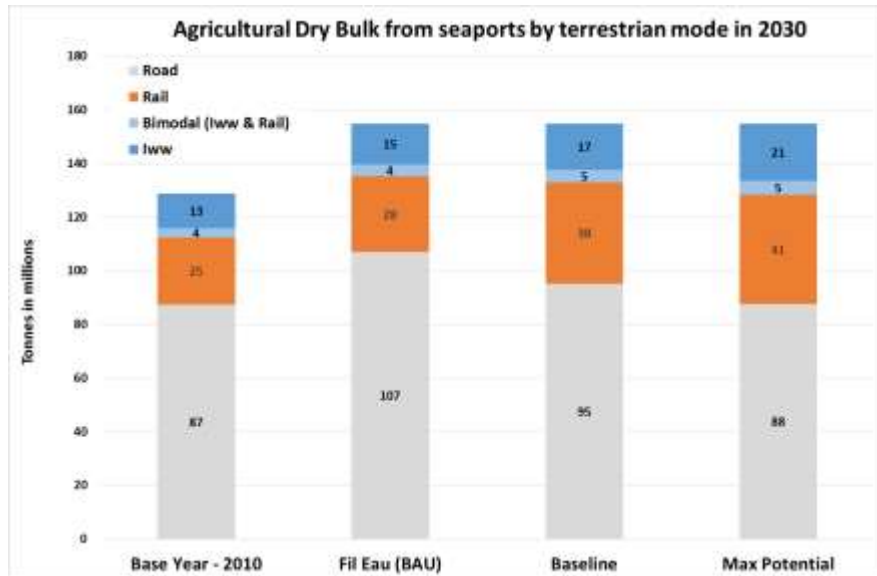


BASELINE 2030 Infrastructure projects + trend on costs



Max Potential : improvement of IWT & rail

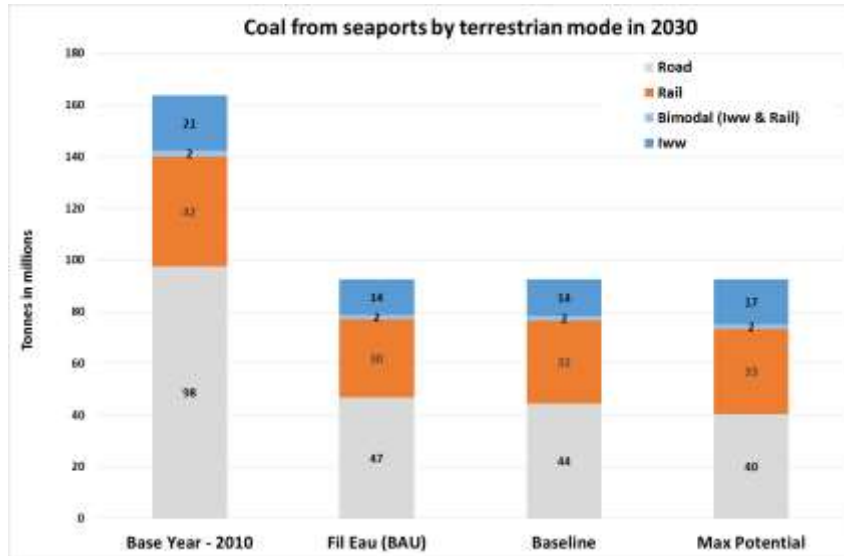
Results on agricultural bulk (included livestock feed)



- ▶ Compared to the Base Year, the traffic increase of :
 - ▶ 20% due to the generation of traffic
 - ▶ 33% in the baseline scenario
 - ▶ 66% in the Max Potential scenario

- ▶ 25% of the traffic is not generated in a core seaports => less concentration of the traffic at EU level
- ▶ When IWT is available, the modal share is high (> 30%), especially for Rhine-Alpine and Rhine-Danube corridors

Results on coal from or to seaports (not intra-continental flows)



Compared to the Base Year, the IWT traffic decreases:



















- ▶ - 35% due to the generation of traffic (BAU) and -43% for all modes (seaports). There is a structural change in the OD.
- ▶ -30% in the baseline scenario
- ▶ -15% in the Max Potential scenario. Modal shift limits the effects of decrease of traffic volume

- ▶ When IWT is available, the modal share is high (> 30%-40%), especially for Rhine-Alpine and Rhine-Danube corridors
- ▶ Rail also represents a high market share (30-35%)
- ▶ Road traffic is for very short distances

3. Next steps



Use the tool to test alternative scenarios & variants

#	Scenario name	Digitalization	Multimodality	Environment	Scope
S1	Baseline				Task A
S2	Maximum potential				Task A
S3	Short Sea Shipping				Task A
S4	Development of rail & IWT connections				Task D
S5	COP21 scenario (based on S1)				Task D
S6	Disruptive scenario (based on S1)				Task D

#	Scenario name	Variant #	Description	Scope
S1	Baseline	V1	Hub & spoke: Concentration of the traffic on the 15 biggest ports able to welcome ULV	Task A
S1	Baseline	V2	Redistribution: Slower traffic growth for containers in the 10 biggest seaports	Task A
S1	Baseline	V3	Faster uptake of new technologies for maritime transport and inland waterway	Task A

Calendar

- ▶ Workshop proposed to discuss more detailed results end of January / beginning of February
- ▶ Another workshop for a wrap up in May
- ▶ Final report end of June / beginning of July

4. Discussions



Questions / issues

- ▶ First feedback on the results?
 - ▶ Growth of containers flows, decrease of energy (coal, crude oil)
 - ▶ Corridor network corridors: projects are improving the connectivity of the largest seaports
 - ▶ No major change in the distribution of traffic amongst ports
- ▶ Any forecast available on the potential of circular economy in ports (in terms of T or revenues?)?
- ▶ Any comments / questions on the answers provided?

Thank you!

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