

# BALKANS

## INTERMODAL & LOGISTICS

SEE Freight Transport Logistics Conference

June  
13-14<sup>th</sup> 2011  
Sofia



Kempinski Hotel  
Zografski  
Conference Center

### Bulgarian Freight Transport Logistics Day



#### With support of:

Ministry of Transport  
Executive Agency Railway Administration  
Executive Agency Maritime Administration  
NC Railway Infrastructure, NC Industrial Zones  
Bulgarian Association of Railway Carriers  
Bulgarian Association of Shipbrokers and Agents  
Bulgarian Association for Freight Forwarding and Logistics  
Bulgarian Shipowners Association, Bulgarian Danube Chamber  
BDZ Holding, BDZ Cargo, Ecologistics Ltd, Bulmarket Ltd



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SINCE 1957



*for*

Green Freight Transport  
Green Balkan Corridors  
Green Balkan Logistics



[www.shortsea.bg](http://www.shortsea.bg)

Conference concept, programme and organizing Shortsea/Intermodal Promotion Centre Bulgaria

# European Freight Transport Development Political Measures

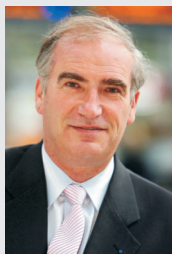
## The New Trans-European Transport Network Policy: An integrated multi-modal freight network



Siim Kallas

"The Commission has already launched the review of the TEN-T policy. We asked the Member States, the Parliament, and all the stakeholders if they would support our vision of a dual-layer Trans-European Transport Network, with the creation of a multimodal "core network" of the strategically most important nodes and links within the EU and beyond. This core network will be complemented by a wide and already existing comprehensive network, which will reflect national transport planning. Soon we will prepare a proposal for this core network, which will not only include the main nodes for passengers and freight but will also be an intelligent, future-oriented network. Innovative information and management systems will support logistic functions, intermodal integration, efficient, sustainable operations and traffic management, in order to establish attractive and competitive door-to-door – or at least terminal-to-terminal – transport chains, according to the needs of the users. In spring 2011, we will propose a revised set of TEN-T guidelines, which will give legal form to this vision. These guidelines will look at network planning and implementation tools – including funding – as one package of policy measures." Mr. Siim Kallas, Vice President of the European Commissions

### Professional Organizations Recommendations



J.-P. Loubinoux



O. Sellnick, UIC



R. Colle, UIRR

"Maximising the potential of Rail Freight: driving intermodal shift. DIOMIS, Agenda 2015, a vision for Combined Transport for Europe. **The challenges for CT: The network.** The rail paths to operate on the network; More flexibility in the cancellation of ordered railway paths is needed; Integrate the design of international rail paths; Improve the transit times allowed by the rail paths. **The physical consistency of the network:** Minimum train length standard to be brought at 750m on all Corridors; Implementation of ongoing and planned rail network investments; Conclusion of an international agreement on a bottlenecks removal program. **The management of the network:** International coordination of CT Terminal development; Implementation of the Freight Corridors; International coordination of the maintenance works.

**The challenges for CT: productivity and adequate framework.** The productivity: Increase the productivity of rail operations and of the output of terminals by at least 20 %, including in the field of wagon use; European wide back bone network of international shuttle & direct services; By 2018, 86.000 CT wagons will be needed compared to the current 56.000. **The regulatory framework: CT needs a solid European regulatory framework.** Coherence with sustainability policies; Stability of the regulatory advantages of CT; Financial incentives; Harmonized European approach, as opposed to individual national measures; **Extreme caution should be exercised regarding the evolution of the parameters for road transport: the Giga liners (impact on CT and rail freight).**"

UIC Presentation of February 2010 session of the TRAN Committee, European Parliament.

### Executive Administrations Viewpoints



S. Tzarnakliyski



V. Vasilev, RAEA



M. Lambrev, NRIC



P. Popov, BDZ

transport but still has a potential for improvement by combining international efforts for set up secure, adequate and reliable logistics chains, imperatively including maritime transport element.

The Bulgaria Logistics Outlook is part of the Central and Eastern European Logistics policies, which focus on the logistics supply chain, foreign trade and the key logistics services providers. In this regard the multimodal transport network with the predominant role of the maritime mode and ports is a topic to be viewed more and more on international events with the participation of eminent policy makers and involved stakeholders. This is exactly what this conference offers with true respect to all aspects of transport logistics, giving analytical insight to the factors affecting the logistic markets with benefits and losses. It is quite understandable that the papers and the discussions during the conference will focus on the European and worldwide expertise to promote a smooth supply chain with multimodal transportation, strongly enhancing the maritime logistics part."

Mr. Sergey Tzarnakliyski, Executive Director Maritime Administration

### Professional Associations Viewpoints



S. Ananiev, BARC



N. Hristov, BASBA



G. Minchev, NSBS



D. Kochanov, BDC

"The development of the intermodal transport and logistics- a trend of the transport, which is as interesting and challenging as it is complex in nature, has the task of providing effective, integrated solutions for freight transport. The integration of "green" modes of freight transport into efficient logistics chains is essential for the economic efficiency and long-term development of the European freight transport, the environmental protection and the consumers facilitation.

The European Commission specific measures and actions in the field of transport logistics with view of optimizing the freight transport and prioritizing these measures and actions in the fight against the climate

changes caused by the heavy traffic have still not been applied in Bulgaria and in the Balkans. It is imperative that an Action plan be developed in the field of transport logistics for Bulgaria which will impose the main development trends of the European transport logistics taking into account the specific conditions, environment and capacities. The aim of the specific measures and actions that will be realized with the Action Plan should be directed to promote infrastructure technologies and innovative practices, to improve the cargo management, to support creation of cargo transportation chains, to facilitate the administrative procedures as well as to improve the quality throughout the whole logistic chain. The Conference held in Bulgaria on the inter-modal transport and logistics of the Balkans is important for the development of the cooperation in Southeast Europe and the Balkans. The participation of leading executives from European and national institutions, experts and professionals from business, professional organizations and transport institutions is essential for the formation of European, regional and national measures and actions that make the sea transport, the rail transport and the inland waterway more attractive and competitive in the context of the Co modality."

Mr. Simeon Ananiev, Chairman, Bulgarian Association of Railways Carriers



# European Best Practices

## Co-operation in the freight market

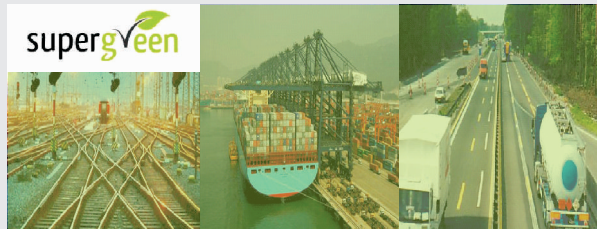
### Common learning projects

Enhance knowledge in the freight logistics sector and foster advanced methods and procedures



DIOMIS

Developing infrastructure and operating models for intermodal shift. Agenda 2015 for combined transport in Europe. [www.uic.org/diomis](http://www.uic.org/diomis)



supergreen

SuperGreen EU Project: Supporting EU's Freight Transport Logistics Action Plan on Green Corridors Issues [www.supergreenproject.eu](http://www.supergreenproject.eu)



Hinterport

Hinterport EU Project: Cooperation, Promotion and Integration of Inland (Dry) ports [www.hinterport.eu](http://www.hinterport.eu)



TIGER

TIGER EU Project: Transit via Innovative Gateway concepts solving European - intermodal Rail needs [www.tigerproject.eu](http://www.tigerproject.eu)

## WATERMODE



WATERMODE Project: Transnational Network for the Development & Promotion of the Water-ground Multimodal Transport. [www.watermode.eu](http://www.watermode.eu)



TRACECA

Motorways of the sea  
FOR THE BLACK SEA AND THE CASPIAN SEA

A Motorway of the Sea (MoS) is a door-to-door intermodal freight chain using a maritime segment with sea-land (rail, road, inland waterway) connections and interfaces. [www.mos-blackcaspiaseas.com](http://www.mos-blackcaspiaseas.com)

# South East Europe Freight Tra

## Collaboration - Coope



*"How shall Railways and Operators cooperate successfully, in relation to SEEC traf hinterland)? Shall they be able to industrialize the production of Intermodal/CT serv interoperable services? Will the Intermodal/CT industry be able to catch the opportu the SEEC, in order to ensure that adequate and modernized rail and terminal infrastr track access, infrastructure charges for CT, priorities new sites for terminals and deve in SEEC: more focus on combined transport; more internationalization; more initiati*

Mr. E

TOGE

SINCE

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- Roadmap to a Single Eu  
Towards a competitive and reso

South East Europe th

Modal shift actions from road to short sea

Motorways of the sea actions for a doc

New multifunctional multimodal termin

## Balkans Intermodal & Logistics Conferen

### Rail Freight Logistics

More regional container /mixed/ block trains  
Sofia - Bucharest - Constantza; Sofia - Istanbul;  
Vidin - Thessaloniki; Sofia - Thessaloniki;  
Ljubljana - Zagreb - Belgrade - Sofia - Burgas,  
Intermodal links Multi ports region N10 and N7

### 2011 Marco Polo new political priorities:

Inland Waterway Transport; SSS-based projects,  
Single Wagonload Traffic, Modal shift actions etc...

### Intermodal Terminal

More superior multifunc  
Thessaloniki, Istanbul, Bel  
Modern Freight villages in  
SEE Intermodal terminal n

### Grimaldi Ferries



### Attica Ferries



### East Med MoS

### Adriatic MoS

### Shortsea Operators

*"East Med MoS Master Plan" identify and present the proposed by the countries as po door-to-door service corridors are identified, in terms of regions, clusters of ports and*

*"To share a common understanding of Motorways of the Sea and of their potential co links in Black Caspian sea. These connections should be integrated for national, region*

As v



# Transport & Logistics Strengthen

Integration - Competition

## for expansion

### Strategies in SEE Countries

...ffices, to develop market relevant Intermodal/ CT services (continental and container services and thus realizing the indispensable productivity gains and achieving seamless activities offered by climate policies in the SEE countries? Challenges to be addressed in the future will be at hand, and related to public and business policies regarding: finance, development /upgrade of existing terminal capacity. Change of attitudes of the Railways in new products?"

Eric Peetermans, SNCB-Holding, Chairman of the UIC Combined Transport Group

the®

1957

per 2011

European Transport Area -  
source efficient transport system

they need much more:

shipping, railways and inland waterways  
door-to-door service/port to port service  
hubs and freight logistics villages/zones

### Consequences and Expected Results

#### Freight Villages

Additional terminals: Sofia,  
Belgrade, Bucharest, Skopje  
in main transport centres  
networking

#### Maritime Freight Logistics

Multi gateway ports region N7 establishment  
Modern ferries services RoPax in Black Sea  
RO-BG-GR RoRo MoS to East and West Med  
Consolidated maritime links Bari port/Bar port  
Baltic - Black Sea - Balkan intermodal corridor

#### 2011 Revision of the Motorways of the Sea concept

Ports and their hinterland connections integration  
into the multi-modal freight corridors/network

well



Feeder Operators



U.N RoRo Ferries



Navibulgar Ferries

Adriatic MoS

Black Sea MoS

potential MoS corridors for the East Mediterranean Master Plan. More specifically, the  
and maritime connections, for setting up and operating more than eight MoS schemes.

contributions to the development of efficient intermodal maritime-based freight transport  
and transit trades of TRACECA Countries in door to door logistics transport chains.

# Bulgarian Intermodal Partners

For optimal integration of green modes  
in South East Europe logistics chains  
Sea ports - inland shipping - river ports - railways

### Bulgarian River Shipping - Port and Shipping Operator



Intermodal: Container and Combined transport services  
From Port Constantza to Vidin, Belgrade, Budapest, Vienna  
Intermodal: Port Vidin - Port Thessaloniki  
[www.brp.bg](http://www.brp.bg)

### Navigation Maritime Bulgare, Ferry Division



Black Sea Ferryboat operations and services  
Ro Ferry / Ro Ro to Odessa, Kavkaz, Poti, Batumi, Samsun  
Black Sea Motorways of the Sea  
[www.navbul.com](http://www.navbul.com)

### BDZ Cargo - Varna FerryComplex Operator

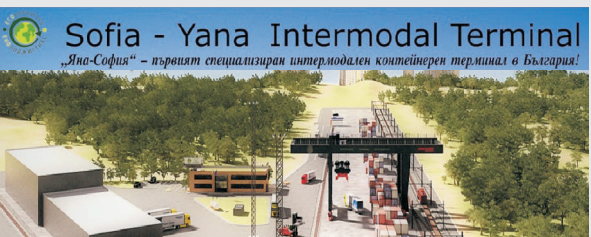


Black Sea Ferryboat Intercontinental Railway Interface  
EU Rail Freight Oriented Network-Russian Federation Links  
[www.bdz.bg](http://www.bdz.bg)

### BDZ Holding / BDZ Cargo / BDZ Sped



Single Wagon Load traffic activities, Block trains, Intermodal  
Combined transportation (accompanied and unaccompanied)  
Full range of services  
[www.bdz.bg](http://www.bdz.bg)



Sofia - Yana Intermodal Terminal  
„Яна-София“ – специализиран интермодален контейнерен терминал в България!  
Intermodal/Container terminal operations and services,  
Freight logistics village functions and additional services.  
[www.ecologistics Ltd.](http://www.ecologistics Ltd.)

### Industrial Zones BG (with logistical functions)



Freight Logistics Operations, Services, Offices  
Warehouses & Business Startup services in Vidin, Ruse,  
Varna, Burgas and Sofia  
[www.nciz.bg](http://www.nciz.bg)



**Events 13th of June 09.30-12.30h Meeting Rooms Kempinski Hotel Sofia**

Closed Meeting: New Bulgarian Measures for Combined Ro-La transport

Closed Meeting: Common MoS Projects Romania - Bulgaria - Greece

Closed Meeting: Establishment of BulKombi - National Combined Transport Operator

Closed Meeting: Logistics Council BG: Action Plan for Transport Logistics

**12.30 OFFICIAL OPENING, Welcome address of officials and guests**

## A G E N D A

### Railway Freight Logistics

**First Day, 13.00-17.30 Themes - Topics - Subjects in Scope of Railway Freight Logistics**

**Rail Freight Oriented Network:** The EU's freight transport agenda today-towards a rail network giving priority to freight. European Rail Freight Oriented Network based on freight corridors. Governance of a Rail Freight Corridors: Governance structure of a Freight Corridor; Executive Committee and Management Committee; Management Board; Working Groups. Future of TEN-T/revision. ERTMS development. Best practice: ERTMS Corridor A / Rotterdam-Genoa.

**Creation of a new rail freight oriented corridors:** New corridors or modifications: always possible. Criteria for freight-oriented corridors. Routes with high business potential. Corridor Development Plan. Business Plans.

**Green Freight corridors:** "Greening" of transport. The Green transport corridor concept. Green freight transport corridors network (maritime, railways, inland waterways). Balkans Green freight corridors-what is needed...

**InterRegional corridors:** Inter-Regional rail freight corridors. Intermodal transport between WE, NE, EEA. International combined transport train-main lines. Regional connections- rail freight network. Best practice: TIGER Project and X Rail Long-term vision

**Rail Freight perspectives:** Balkans freight flows. Imbalances in freight flows. Rail freight market growth; Rail freight : collaboration or competitiveness. Optimization of cargo flows (import, export, transit)

Analysis of current flow/volume/capacity. Analysis of potential growth in flow/volume/capacity.

Regional freight corridors. Regional facilitations: making freight corridors work. SE Europe regional mixed block trains.

**15.00-15.30 Coffee Break. Business Network**

**18.00 Inauguration of Sofia Yana Intermodal Terminal**

### Maritime Freight Logistics

**Second Day, 9.00-12.00 Themes - Topics - Subjects in Scope of Maritime Freight Logistics**

**Short Sea Shipping:** The role of short sea shipping in freight logistics chains. "Greening" short sea supply chains. Maritime-based intermodal transport schemes. Impact of Common Maritime space without barriers to EU SSS. "Blue belt" concept. Regional Short sea shipping dominated by feeder and short sea traffic. Inter-modal business projects: Watermode; P2P Gateway PP24 and MIELE Feeder & Shortsea Ro Ro market review and future trends. Regional markets / capacity:

sea- road/rail combined transportation /ro-ro ferry transportation. Potential of ro-ro ferry transport links.

**Motorways of the Sea:** MoS around SEE/Balkans. Motorways of the Sea operated by all types of regular short sea shipping services including Roll-on/Roll off, Ro-Ro ferries, Rail ferries, container vessels and Sea River ships. New Ro-Ro & Ferry MoS projects around SEE. Integration of regional Motorways of the Seas into the door-to-door logistic chain (regional freight corridors)

Best practice: East Med MoS, Black Sea MoS, West Med MoS, etc...

**Regional Multi modal ports.** Regional ports integration into intermodal freight logistics chains/TEN-T. Corridor gateways. Balkan Multiports Gateway regions: North Adriatic, Marmara, West/NWest Black sea. Balkans "Blue lanes". Port-to-port rail connections. Intermodal links between regional mega / multi ports maritime regions. Ports as an intermodal freight centers. Combining short sea shipping with Co-modal rail. Trend: sea ports - rail transportation. Ports and hinterlands connections. Gateway function and multimodal interfaces of some Balkans/Black sea ports. SE Europe's biggest ports building interregional intermodal freight logistic chains.

Deep sea and Short sea ports. Balkans ports-inland waterway (Danube/Sava) freight connections. Multi-modal/Trimodal Inland Port.

**12.00 - 13.30 Buffet Lunch Network**

### Intermodal Terminals / Freight Logistics Villages

**13.30 - 17.30 Themes - Topics - Subjects in Scope of Intermodal Terminals and Freight Logistics Villages**

**Regional intermodal chains:** Intermodality/Co Modality in TEN-T future Development of European-wide CT network. EIRAC concept CO3/Collaboration Concepts for Co-Modality. The Regional/Balkans intermodal links and terminal network. Current problems of regional intermodal rail freight transport. Balkans as Multi-modal platform. Intermodal links/connections to/across /around Balkans. Intermodal /combined transport development in SEE. Current problems of intermodal /combined freight transportation

**Intermodal Terminals:** Intermodal connections: the role of terminals. Improving the intermodal freight connections /linking sea and inland dry ports; sea and railways; railways and inland waterways. Coordinated Intermodal /CT terminal development - intermodal stations / rail ports / rail villages. Multi functional intermodal terminals. New high-capacity intermodal terminals the upgrading of existing terminals. Development of intermodal corridor terminals - marshalling yards, intermodals terminals, freight villages.

**Freight Logistics Villages:** Internationalization of logistics activities. Balkans as a freight logistics platform. The transport and logistics industry cooperation. Cohensive transport and logistics networks. Cooperation between the logistics operators and intermodal / combined transport operators. Freight villages - integration of logistics activities & intermodal terminals. International logistics centres along the Balkans' freight corridors. International /national logistics centers.

Concentration of transport and logistics activities in larger infrastructure centers-freight logistics villages.

Balkans/Regional logistics hubs. Cooperation projects in order to set up freight logistics villages/centres.





## SNCB Logistics, a European client-oriented logistics approach



IFB, multimodal solutions with a focus on rail container transport.



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