Interreg CENTRAL EUROPE

European Union European Regional Development Fund

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PILOT ACTION: How to set up new intermodal services along the OEM corridor

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SCOPE OF THE PILOT ACTION

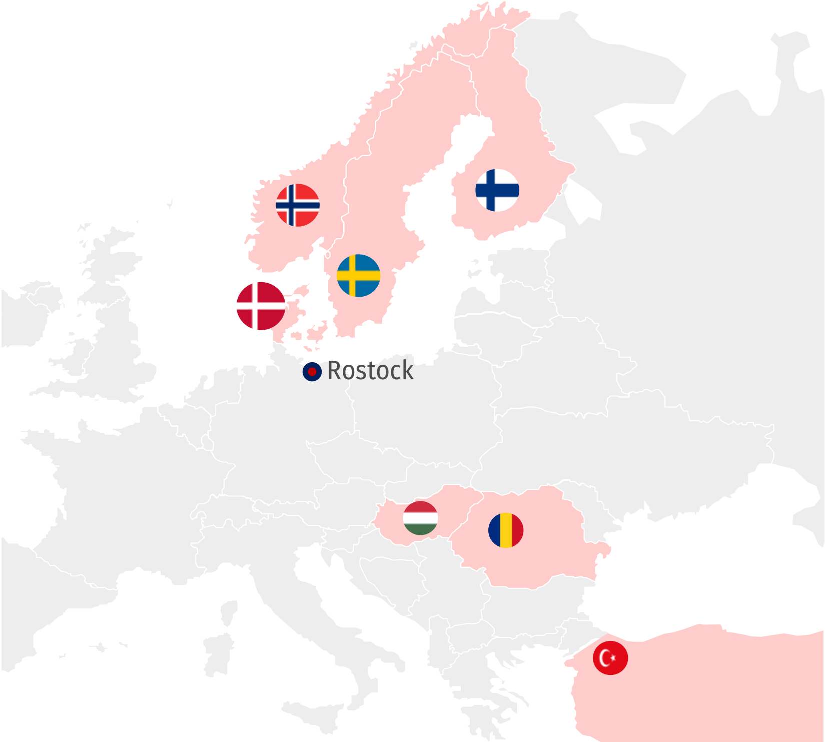
- Rostock Port implemented three market analyses for train concepts (D.T2.3.1-3) between Scandinavia and Hungary, Turkey and Romania via the Port of Rostock
- The logistics concepts should be based on in-depth analyses of goods flows and market potentials for selected cargo commodities, destinations and intermodal hubs, including the identification of potential clients and potential transport operators

PROCESS AND ACTIVITIES REALISED

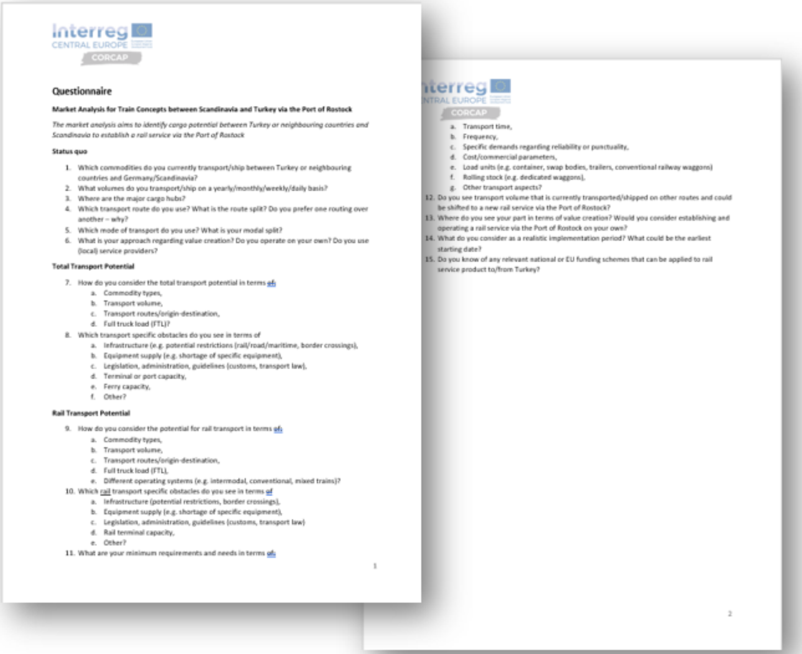
- D.T2.3.1-3: Market studies for source regions Hungary, Turkey and Romania comprising:
    - Mapping of goods flows for different cargo commodities along the OEM corridor and related sections of crossing TEN-T corridors (T2.3.1)
    - In-depth analyses for selected cargo commodities, destinations and intermodal hubs (T2.3.2)
    - Development of logistics concept for new intermodal services along the OEM corridor (T2.3.3)
- D.T2.3.4 Testing of logistics concept for new intermodal services along the OEM corridor by launching a separate online platform to demonstrate the project results and the capabilities of the corridor

Methodology of Market Analysis

- desk research by external consultants and internal staff for different steps of the sub-action
- interviews with market players (like cargo owner; freight forwarder; logistics operator) by the consultants -> if and whenever possible with own staff
- Train concept development
- Market penetration to presentation of product sheets about rail freight solutions to decision makers



Questionnaire & Key messages


Questionnaire

Market Analysis for Train Concepts between Scandinavia and Turkey via the Port of Rostock

The market analysis aims to identify cargo potential between Turkey or neighbouring countries and Scandinavia to establish a rail service via the Port of Rostock

Status quo

1. Which commodities do you currently transport/ship between Turkey or neighbouring countries and Germany/Scandinavia?
2. What volumes do you transport/ship on a yearly/monthly/weekly/daily basis?
3. Where are the major cargo hubs?
4. Which transport route do you use? What is the route split? Do you prefer one routing over another – why?
5. Which mode of transport do you use? What is your modal split?
6. What is your approach regarding value creation? Do you operate on your own? Do you use (local) service providers?

Total Transport Potential

7. How do you consider the total transport potential in terms of:
   a. Commodity types,
   b. Transport volume,
   c. Transport routes/origin-destination,
   d. Full truck load (FTL)?
8. Which transport specific obstacles do you see in terms of
   a. Infrastructure (e.g. potential restrictions (rail/road/maritime, border crossings),
   b. Equipment supply (e.g. shortage of specific equipment),
   c. Legislation, administration, guidelines (customs, transport law),
   d. Terminal or port capacity,
   e. Ferry capacity,
   f. Other?

Rail Transport Potential

9. How do you consider the potential for rail transport in terms of:
   a. Commodity types,
   b. Transport volume,
   c. Transport routes/origin-destination,
   d. Full truck load (FTL),
   e. Different operating systems (e.g. intermodal, conventional, mixed trains)?
10. Which rail transport specific obstacles do you see in terms of
    a. Infrastructure (potential restrictions, border crossings),
    b. Equipment supply (e.g. shortage of specific equipment),
    c. Legislation, administration, guidelines (customs, transport law)
    d. Rail terminal capacity,
    e. Other?
11. What are your minimum requirements and needs in terms of:

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a. Transport time,
b. Frequency,
c. Specific demands regarding reliability or punctuality,
d. Cost/commercial parameters,
e. Load units (e.g. container, swap bodies, trailers, conventional railway waggons)
f. Rolling stock (e.g. dedicated waggons),
g. Other transport aspects?

12. Do you see transport volume that is currently transported/shipped on other routes and could be shifted to a new rail service via the Port of Rostock?
13. Where do you see your part in terms of value creation? Would you consider establishing and operating a rail service via the Port of Rostock on your own?
14. What do you consider as a realistic implementation period? What could be the earliest starting date?
15. Do you know of any relevant national or EU funding schemes that can be applied to rail service product to/from Turkey?

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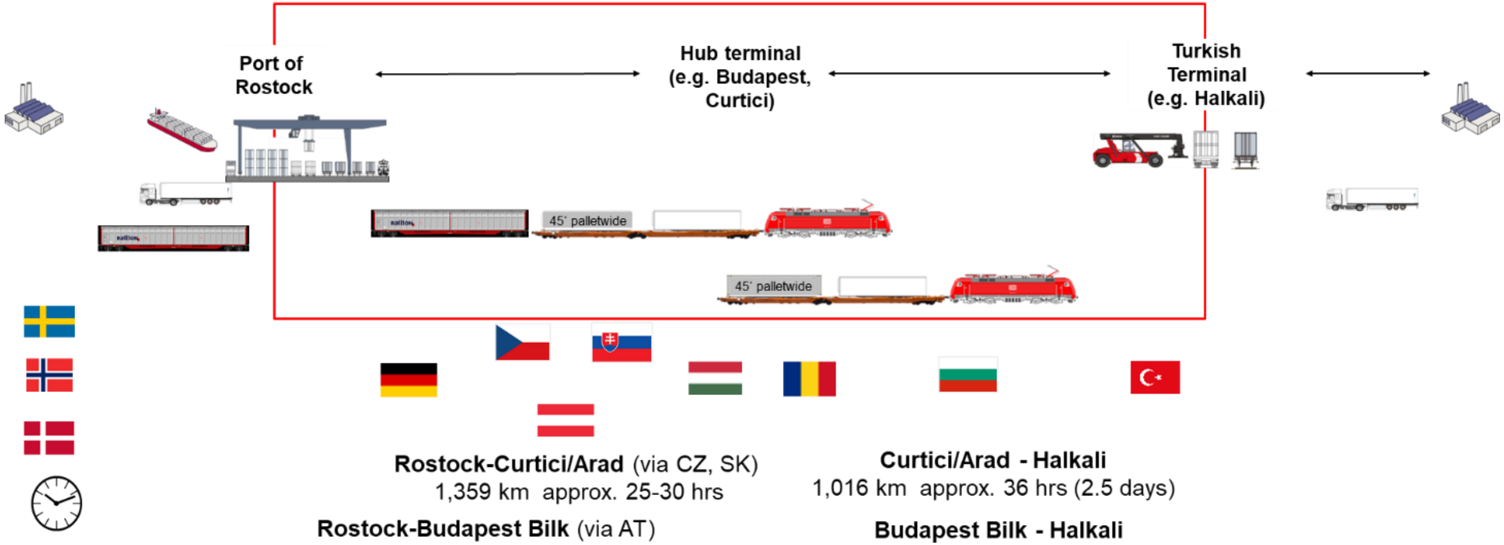
Main Content:

- status quo (company specific),
- total transport potential,
- rail transport potential,
- commodity mix,
- transport volume,
- major cargo hubs: origin-destination,
- transport routing,
- modal split,
- role in the transport chain,
- obstacles,
- minimum requirements,
- implementation period/starting date,
- funding schemes etc.

Key messages

- Traffic is typically running by road
- Imbalanced flows north- and southbound
- Not start recommenced due to insecure economic outlook
- bad experiences with intermodal services
- Road companies are open for new opportunities
- Hub in between for more cargo would be useful
- Min. 2-3 weekly departures

Transport chain with key infrastructure, equipment and estimated duration



Rostock-Curtici/Arad (via CZ, SK)
1,359 km approx. 25-30 hrs

Rostock-Budapest Bilk (via AT)
1,446 km approx. 26-30 hrs

Curtici/Arad - Halkali
1,016 km approx. 36 hrs (2.5 days)

Budapest Bilk - Halkali
1,525 km approx. 96 hrs (4 days)

CHALLENGES ADDRESSED

- imbalanced flows for relevant commodities, adequate utilization in both directions is a challenge
- Corona is a challenging period to establish a new service in the market, but Covid-19 pandemic created also a window of opportunity as rail services are associated with operational stability
- especially in the beginning of a train service the demand is often under required minimum capacity utilization for a block train concept
- convincing charges and transfer times for the road sector are indispensable for a shift from road to rail; adequate incentive schemes often not exist
- cooperating partners or a need for evacuated fleet of vehicles are needed for delivering trailers in host countries

LEARNINGS AND FOLLOW-UP

Assessment of land corridor

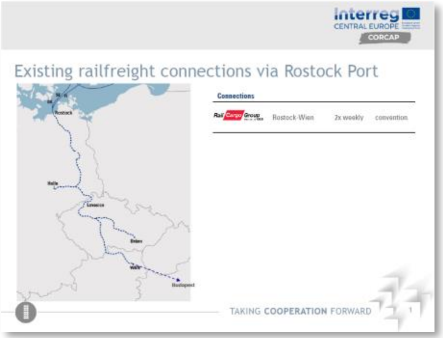
Pro

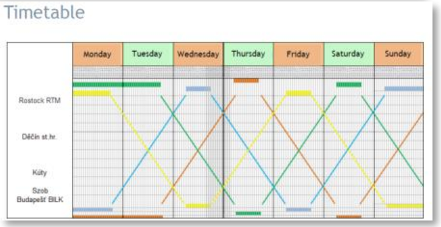
- **Less interfaces** and **less parties involved**, no additional transport mode or intermodal transhipment (=reliable option)
- **Feasible option** to **connect existing South-Eastern European rail hubs** (Budapest, Curtici, Sopron, Vienna) and **ongoing services** along the corridor to attract additional cargo and reduce utilisation risk
- Potential to constantly **achieve competitive transit time**

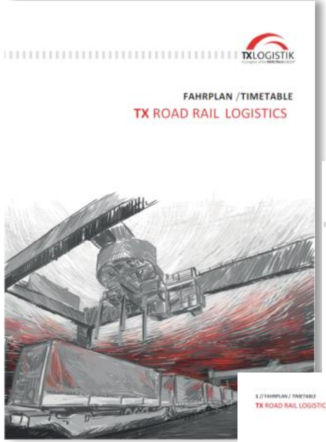
Contra

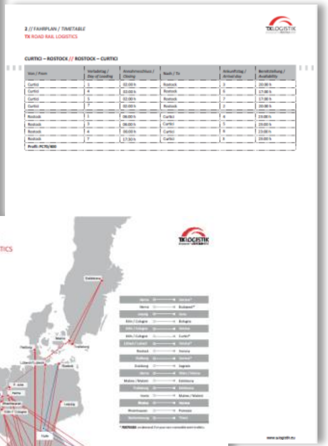
- **Capable rail terminal infrastructure** limited **to European part of South-Eastern, potential bottlenecks** with increased rail services
- Development of terminal infrastructure depend on strategy ot state-owned rail company, short term private terminal investments unlikely
- **Infrastructure and operational bottlenecks** along the corridor (e.g. Serbia)
- High costs bears financial risk for a single intermodal operator

Market Analysis: product sheets









Online platform – testing logistic concepts

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Hafen Rostock – Intermodal-Netzwerk

Die Inbetriebnahme des ersten Kranes erfolgte im Dezember 2013. Im Februar 2014 wurde das KV-Terminal mit der Abnahme des zweiten Kranes die mobile Umschlagtechnologie mit „Reachstackern" abgelöst, womit eine Verdoppelung der Umschlagkapazität erreicht wird.

Nach Ende der Bauarbeiten stehen jetzt zusätzlich drei weitere Gleise für den Umschlag zur Verfügung. Die nun insgesamt fünf Gleise werden durch zwei neue, kurventaugliche Portalkräne bedient, jeder mit einem Gewicht von 500 Tonnen, einer Höhe von 35 Meter und einer Spannweite von 76,5 Meter.

Zugverbindungen von / nach Rostock ab 2021

Bettembourg (LU)	3x wöchentlich	CLF Multimodal / Stena Line	18 Std.
Bratislava (SK)	2x wöchentlich	LKW WALTER	18 Std.
Brünn (CZ)	3x wöchentlich	LKW WALTER	15 Std.
Curtici (RO) via Dresden	1x wöchentlich	LKW WALTER	30 Std.
Dresden (DE)	5x wöchentlich	LKW WALTER	11 Std.
Halle (DE)	1x wöchentlich	DEUCON	14 Std.
Treviso* (IT)	2x wöchentlich	Green Cargo	24 Std.
Verona (IT)	3x wöchentlich	LKW WALTER	23 Std.
Wien* (AT)	3x wöchentlich	RCA	25 Std.
Herne (DE)	3x wöchentlich	LKW WALTER	12 Std.
Xi-an (CN) via Kaliningrad	3x wöchentlich	DB Cargo Eurasia	12 Std.

Zugverbindungen von / nach Trelleborg ab 2021

Eskilstuna (SE)	7x wöchentlich	TX Logistik	11 Std.
Hallsberg (SE)	3x wöchentlich	Kombiverkehr	8 Std.
Klaipéda (LT)	3x wöchentlich	Kombiverkehr	8 Std.
Oslo (NO)	6x wöchentlich	CargoNet	13,5 Std.

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Der Hafen Rostock ist auf **zwei Korridoren vertreten**

1. North-Sea-Baltic
2. Orient/ East Med

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