

O.T1.11 ACTION PLANS - BRATISLAVA

Output factsheet: Strategies and action plans

Version 1

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Summary description of the strategy/action plan (developed and/or implemented)

Action plans adopted by Public ports, jsc are a result of two analyses, D.T1.2.6 *Analysis on Multimodal Nodes Efficiency And Connections* and D.T2.2.6 *Analysis on ECO-solutions deployment* elaborated within the project *TRANSPORT AND LOGISTICS STAKEHOLDERS NETWORK* (TalkNET) financed by Interreg Central Europe Programme. Actions were identified in AS-IS analyses and supported by respective SWOT analyses. Its purpose was to define an action plans containing planned activities identified as necessary in order to achieve defined goals in the field of Multimodality and last mile connection improvement and ECO-SOLUTIONS DEPLOYMENT, both for public port of Bratislava. At the bottom of the document an overview of relevant stakeholders is attached.

The first action plan developed is focused on the field of multimodality and is related to the clusters 2 - the node management optimization and 3 - new multimodal services optimization and will focus on two main actions:

- Creation of a formal contractual ownership relationship to port infrastructure / Implementation of Full Landlord model
- Increase of level of services offered in the port

The second action plan developed focused on the field of eco-innovations is related to the cluster 5 - energy efficiency and with the focus on one principal action:

- Construction of LNG terminal in public port of Bratislava

ACTION: Creation of a formal contractual ownership relationship to port infrastructure / Implementation of Full Landlord model

Before any considerable development activities in the port, it is necessary to resolve the non-standard relationships in the port and establish ownership rights to the port infrastructure in favor of the port authority, Public ports, JSC. Company, as the authority of Slovak inland public ports is burdened by the significant number of long-term contracts concluded in the past. This is results of multiple transformations of port authorities / operator in the past. Existing commercial relations, therefore, together with the provision of insufficient funds, constitute one of the main obstacles to the further development of public ports in Slovakia. The present state of ownership of the Bratislava port has, therefore, a negative impact on the existence of an optimal market environment, internal competition and the related development and quality of services offered to customers. Current ownership relations in the area of Slovak public ports is specific and does not have any relevant equivalent.

A key step to ensure optimal port development, as per multiple studies carried out in the past, is to acquire the ownership of the infrastructure. In order to achieve this, three options for resolving the current non-standard setting of port ownership relations in the port are considerable, namely:

- Acquisition of infrastructure from a private legal entity / current owner and major port operator;
- Establishment of a joint venture with a private entity / current owner and major port operator;
- Replacement of part of land owned by Public ports, JSC for infrastructure owned by a private entity and major port operator (SWAP);
- Expropriation of infra and super structure as last and the most extreme way to acquire an ownership.

- **ACTION: Increase of level of services offered in the port**

Multiple historical transformations, split of property rights and responsibilities, many years of underfunding, all combined with lowering attractiveness of water transport caused stagnation in terms of provided services and compliance with modern trends, such as waste management, eco-solutions etc. Port of Bratislava has the ambition to reach the level of advanced inland ports in the Rhine-Main region, where most of the Slovak industry's exports are directed and thus provide an adequate alternative. In freight transport in the context of intermodal transport and complex logistics services, there is a high demand for the transport of piece goods (including containers) and Ro-Ro freight. However, the offer of the port in freight transport is over-sized in the field of bulk goods transport. Currently there are no public facilities in public ports designed to provide ecological services related to the collection of ship-generated waste, refueling and potable water for vessels. The facility is planned to be in the location of the cargo port of Bratislava and will be used by the landing of the vessels. Public port of Bratislava does not provide any organized waste collection from cargo vessels and does not allow access to alternative fuels (e.g. LNG). Finalization of pre-project preparation (submission of studies) is expected by 8.2020

- **ACTION: Construction of LNG terminal in public port of Bratislava**

Water transport is currently the most competitive current in terms of external costs. The comparison of water transport with terrestrial modes is provided in the following graph. Despite the low external costs, the share of water transport in the total amount transported in tkm in the Slovak Republic is low. This causes a number of problems accompanying the inland waterway transport in the EU, in addition to the specific features of the Danube River. The use of electricity, LPG or CNG is represented only in urban public transport and in the case of passenger cars. The project of renting electric vans in the Slovak Republic with replaceable batteries was unsuccessful and ceased. The deployment of alternative fuels is currently in the hands of private companies for which cost and operational efficiency are important. Activities inside of port as well as in its surroundings are differentiated, interests and opinions of various relevant stakeholders (public / private / potential clients / suppliers) must be taken into consideration. Currently there is one project ongoing with aim to offer services for vessel with ecological propulsion, the Construction of the LNG terminal in public port of Bratislava.

The implementation of the project will contribute to the greening of the Bratislava public port in accordance with the requirements for the introduction of alternative fuels in public ports within EU countries.

Finalization of pre-project preparation (submission of study) is expected by the end of 2020.

NUTS region(s) concerned by the strategy/action plan (relevant NUTS level)

- NUTS region SK01 Bratislavský samosprávny kraj / Bratislava Self-Governing Region
- Area: 2,053 km²
- Inhabitants: 610,850 (2017)
- Population density: 297,6 inhabitants per km²

All activities pre-defined and planned within both abovementioned Action plans will take place in the area of public port of Bratislava, capital city of Slovakia.

Expected impact and benefits of the strategy/action plan for the concerned territories and target groups

D.T1.5.7 ACTION PLAN TO IMPROVE MULTIMODAL NODES EFFICIENCY AND CONNECTIONS - BRATISLAVA

Implementation of full landlord model will concentrate all assets necessary for the port authority to follow its purpose. Ownership of land, infrastructure and superstructure combined with decision power will enable to follow long-term strategic priorities and will remove obstacles regarding regional and European sources of financing of its development.

DT2.5.7 ACTION PLANS ON ECO-SOLUTIONS DEPLOYMENT - BRATISLAVA

Project partner's response to the topic of ECO-Solutions deployment is construction of LNG terminal in public port of Bratislava. Expected impact for the future is to contribute to eco-friendly transportation and to respond to the currently growing demand for LNG either as a fuel or as a shippable commodity.

Sustainability of the developed or implemented strategy/action plan and its transferability to other territories and stakeholders

D.T1.5.7 ACTION PLAN TO IMPROVE MULTIMODAL NODES EFFICIENCY AND CONNECTIONS - BRATISLAVA

Re-negotiation of property relations in the area of public port Bratislava in favor of Public ports, JSC will help the port authority to achieve standard operation model used widely across the world. Such particularity will serve as starting point for overall development to infra and superstructure.

DT2.5.7 ACTION PLANS ON ECO-SOLUTIONS DEPLOYMENT - BRATISLAVA

Construction of LNG terminal to fulfil commitment to decrease negative impact on environment and to extend provided port services. The LNG terminal is planned to follow the wider distribution chain relationships, where the gas supplier supplies pipelines to the terminal in the port of Bratislava, which will then be processed and distributed by the waterway to the end user - other ports on the Danube.

Lessons learned from the development/implementation process of the strategy/action plan and added value of transnational cooperation

Major lesson learned when considering any kind of development activities was the necessity of functional port operation model. Current property set-up where port authority owns land but major (private) operator owns infrastructure and superstructure has been tagged as inefficient and unsustainable for the future in multiple development plans elaborated by relevant experts. It not only eliminates competition within the port but also is an obstacle for eventual public funding opportunities.

References to relevant deliverables and web-links
If applicable, pictures or images to be provided as annex

- D.T1.2.6 ANALYSIS ON MULTIMODAL NODES EFFICIENCY AND CONNECTIONS - PUBLIC PORT OF BRATISLAVA (TalkNET)
- D.T2.2.6 Analysis on ECO solutions deployment - PUBLIC PORTS OF BRATISLAVA;
- D.T1.5.1/D.T2.5.1 Methodology for action plans development
D.T1.5.7 - Action plans to improve multimodal nodes efficiency and connections - PUBLIC PORTS OF BRATISLAVA
D.T2.5.7 - Action plans on eco-solutions deployment - PUBLIC PORTS OF BRATISLAVA
- Aktualizácia koncepcie rozvoja verejných prístavov 2010
- Strategický plán rozvoja dopravnej infraštruktúry SR do roku 2020 Fáza I
- Strategický plán rozvoja dopravy SR do roku 2030 - Fáza II
- Stratégia rozvoja Verejného prístavu Bratislava (Master plan) 2015