

# 3<sup>RD</sup> FORUM OF THE EU STRATEGY FOR THE ADRIATIC CATANIA 24-25 MAY 2018 AND IONIAN REGION

A NEW VISION OF TRANSPORT FOR DEVELOPMENT AND COHESION

## MOBILITY IN THE A&I MACRO- REGION: WHICH WAY TO FOLLOW?



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## Part 1: NEW DEVELOPMENTS IN TRANSPORT ON GLOBAL LEVEL



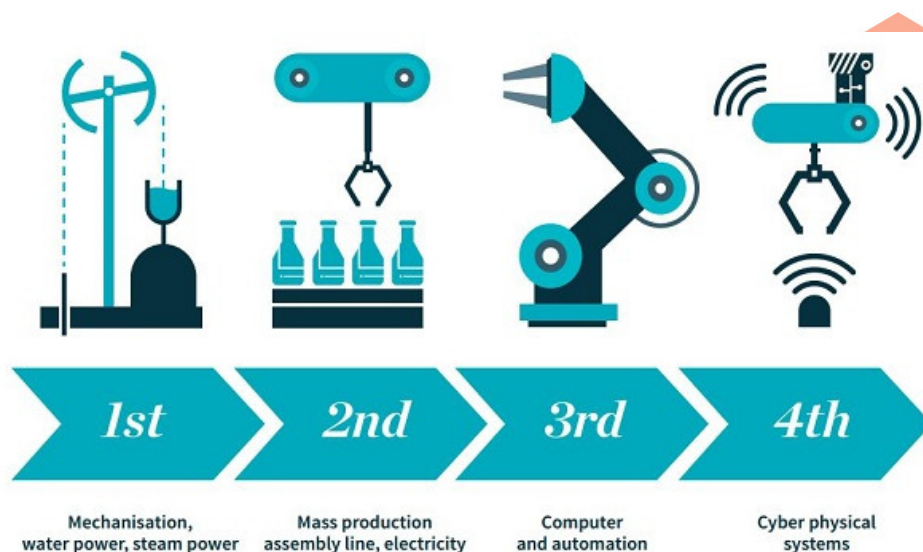
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## 4th Industrial Revolution: more than a buzzword?

<https://www.weforum.org/about/the-fourth-industrial-revolution-by-klaus-schwab>



Source: Internet

➤ **The World is changing fast!**  
Faced with fastest pace of change characterized by a range of new technologies, impacting all disciplines, including transport.

➤ **No medium to long-term predictions possible!**



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## The key technologies driving 4th revolution

### I) Digitalisation and innovation:

e.g.

- big data,
- 3D printing,
- Internet of Things (IoT),
- integrating digital information with the real world (augmented reality),
- ...

### II) Innovative financing (Search for new ways of financing incl. cryptocurrency = virtual currency)

**A great impact on transport and logistics for providing faster, cheaper, more reliable and sustainable business practices.**



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## Transport under the direction of new technologies

- I) ICT (ERTMS, VTMS, ITS, ATM-SESAR, ...), Digitalisation**
- II) Fully driverless automated system (autonomous cars, trains, ships, ...)**
- III) High capacity mass transit solutions (metro, ...)**
- IV) Resilient infrastructure** (all-weather operation, resilient to natural disasters)
- V) Sustainable** (low noise, low emission, reducing travel time)
- VI) eMobility** (for buses, trams, personal vehicles; electric multiple locomotives/units; dual powered locomotives, electric vehicles operating wireless)
- VII) Air: Drone delivery, electric and solar airplanes, ...**
- VIII) Re-shaping urban transport (car-sharing, e-cycling, P&R, ...)**
- IX) New logistic concepts (Smart warehouse systems, last mile concepts, ...)**
- X) Alternative fuels**



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## Part 2: TRANSPORT IN THE ADRIATIC-IONIAN REGION



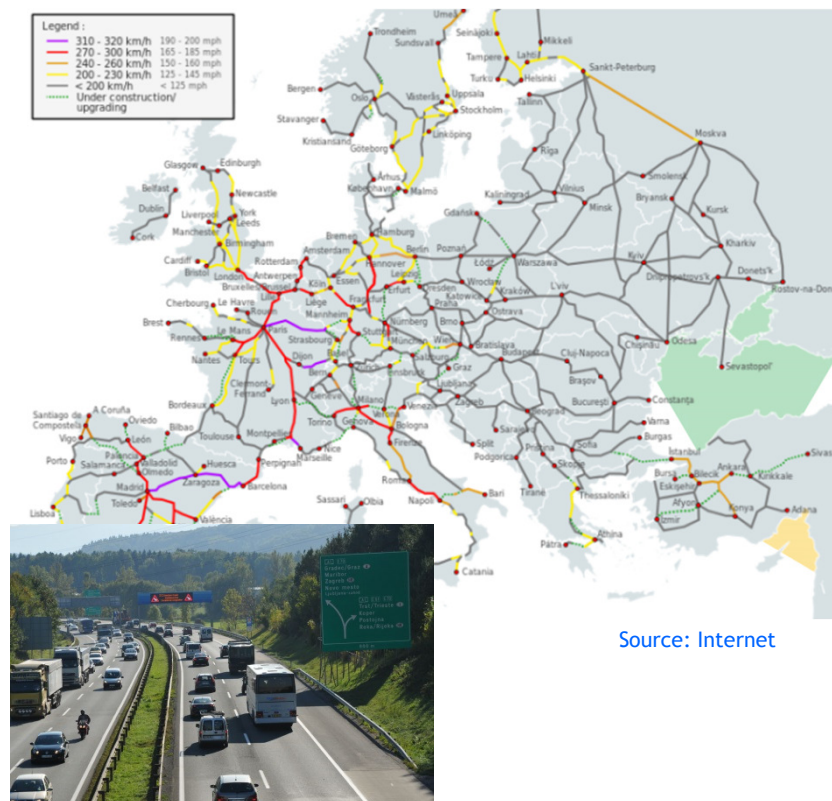
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## Adriatic & Ionian Region – transport



**High diversity between 8 countries (EU 4 and non-EU 4), including unbalanced transport services and infrastructure.**

Contradictions:

- Rail: Low freight and passengers transport, Underused extensive network of railways,
- Road: High freight and passengers transport on the road, overused extensive yet mostly poor road infrastructure, Low motorization of the population in most of AI macro-region, too high number of fatalities and seriously injured on the roads
- Maritime: High number of ports, low level of container transhipments,
- Aviation: Inadequate air transport connections, relatively high number of airports,

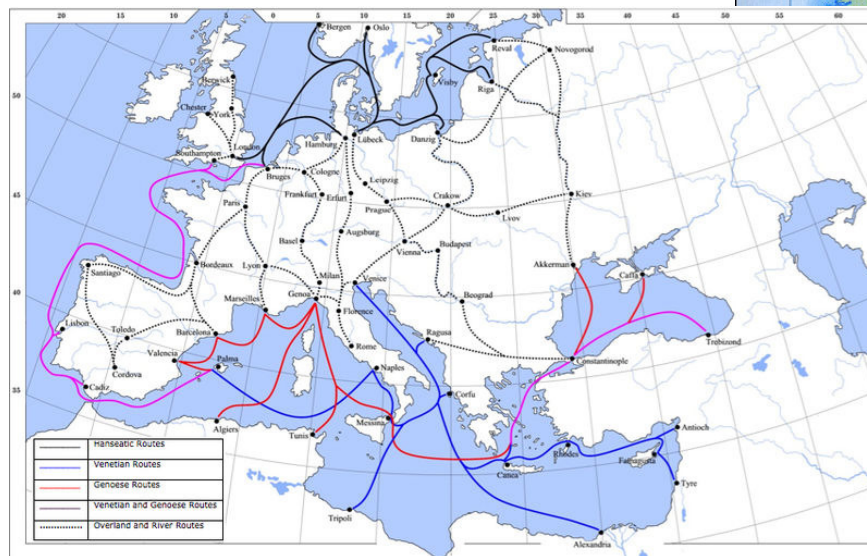


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## Infrastructure: Roman Routes



Source: Internet



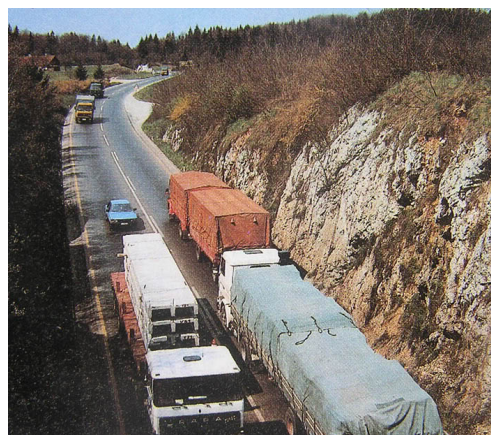


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## Infrastructure: Construction



Source: Internet

Road of Brotherhood and Unity (Put bratstva in jedinstva);

**Section „Highway Ljubljana - SI/HR border“;**

80 km, single carriageway (two lanes);

- Construction started **1 April 1958** and road opened **23 November 1958**
- in less than **8 months all works completed!**
- 54.000 workers („brigadiers“), assisted by workers from 17 construction companies



**„Motorway Ljubljana-SI/HR Border“;**

- 104 km: 4 lanes carriageway (two lanes each direction plus hard shoulder),
- Construction started **November 1989** and **ended 2007**
- **works completed in 18 years!**



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## Infrastructure: Adriatic-Ionian Corridor

From Italy,  
...via Slovenia,  
Croatia,  
Bosnia & Herzegovina,  
Montenegro,  
Albania,  
... to Greece!



Construction of multi-modal corridor?

Way forward:

- Enhanced cooperation
- Enhanced coordination
- Agreement on common priorities (Project prioritisation)
- Jointly supported financing initiatives



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## EUSAIR & LOGISTICS: LPI

LPI (Logistics Performance Index) measures logistics efficiency.

### Six component indicators:

- 1) The efficiency of the **clearance process** (e.g. speed, simplicity)
- 2) **Quality of infrastructure** (roads, rail, ports, RRT, ITS)
- 3) The ease of arranging **competitively priced shipments**
- 4) The competence and **quality of logistics services** (transport operators, customs brokers)
- 5) The **ability to track and trace consignments**
- 6) The frequency with which **shipments reach the consignee** within the **scheduled or expected delivery time**

Adriatic-Ionian macro-region countries:

**LPI ranking and scores 2012, 2014 and 2016** (of 160 countries)

Country	Rank	Country	Rank
Italy	(24) (20) <b>21</b>	Serbia	(75) (63) <b>76</b>
Greece	(69) (44) <b>47</b>	Bosnia & Herzegovina	(55) (81) <b>97</b>
Slovenia	(34) (38) <b>50</b>	Albania	(78) (n.a.) <b>117</b>
Croatia	(42) (55) <b>51</b>	Montenegro	(120) (67) <b>123</b>

Source: World Bank (Connecting to compete 2016: Trade logistics in the global Economy  
<http://lpi.worldbank.org/international/global/2016>)



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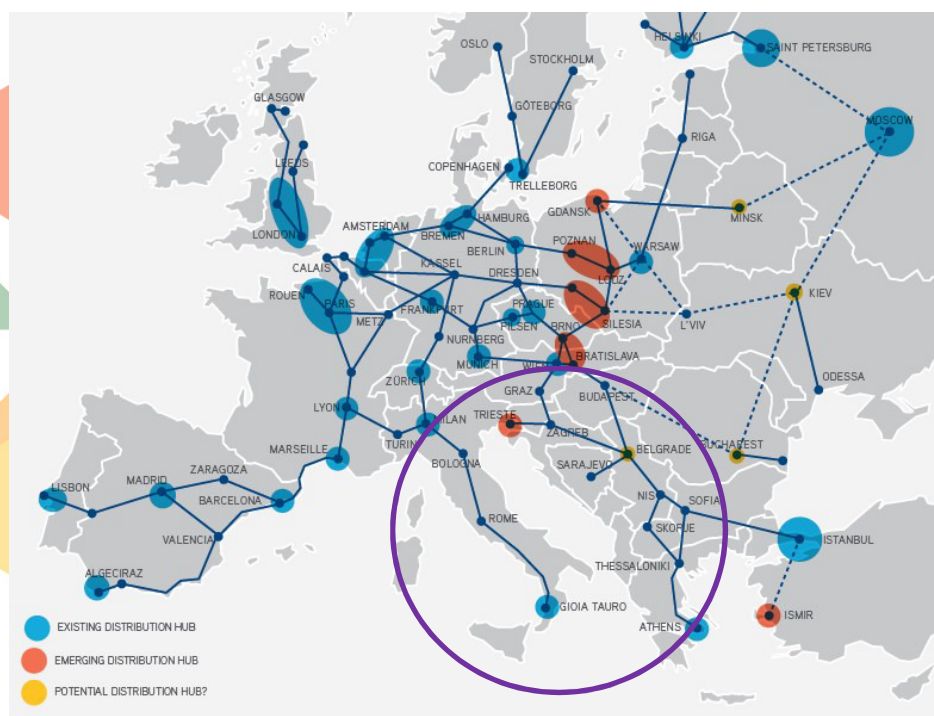
## EUSAIR & Logistics hubs

**Are macro-regional needs fulfilled?**

Where are intermodal terminals needed? ... and how many?

To be considered when looking ahead:

- **Sustainability:** „Green“ logistics,
- **Digitalization:** eLogistics
- **New business model:** „Circular economy“



Source: Internet - Colliers report „Emerging logistics hubs in 2020“



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## Part 3: WAY FORWARD CHALLENGES CONCLUSIONS



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## Established structures & Exploiting synergies



- **Adriatic-Ionian Initiative (AII)**
- **EUSDR – Danube**  
14 countries = 9 EU MS + 5 Non-EU MS;
- **EUSAIR – Adriatic-Ionian**  
8 countries = 4 EU MS + 4 non-EU;
- **EUSALP – Alpine**  
7 countries = 5 EU and 2 non-EU;
- **SEETO/ Transport Community Treaty**



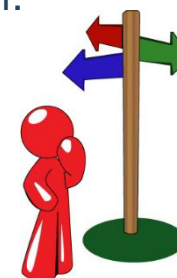
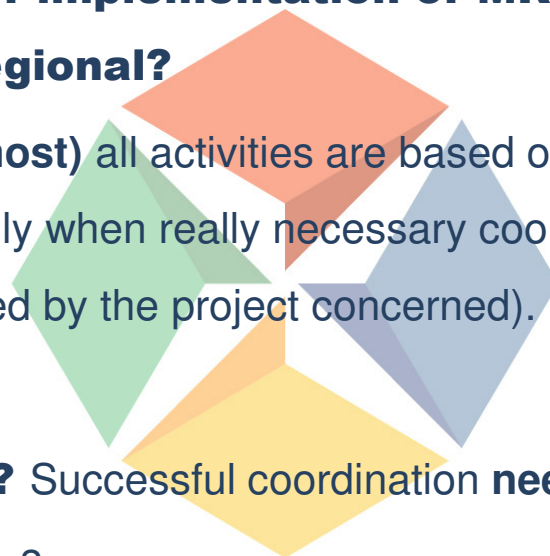
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## CHALLENGES

- ❑ **The first challenge of implementation of MR strategy remains: National or macro-regional?**
  - Experience tells that **(almost)** all activities are based on **national development needs!** Only when really necessary coordinated activities start (with the countries covered by the project concerned).
- ❑ **Which way to follow?** Successful coordination needs agreement on:
  - Where we would like to go?
  - What we would like to achieve?





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### Conclusion

**To narrow the gap between performance of individual countries:**

- **better use of intermodal transport in the region** (“full modal integration”), quality and reliability of railways to improve, roads: missing links constructed and bottlenecks removed, high performing sea and river ports, including new intermodal terminals developed.
- **Removal of border-crossing barriers**, in particular administrative
- **a shared vision (or/and master plan) for development of transport infrastructure is needed**, so that the infrastructure works that are stalled, delayed or postponed would restart
- **Increase Investments on all levels** (EU, national, regional, local)



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## Thank you very much!

Please visit MR websites:

EUSDR: <http://www.danube-transport.eu/>

EUSAIR: <https://www.adriatic-ionian.eu/about-eusair/pillars/yellow-pillar/>

EUSALP: <https://www.alpine-region.eu/action-group-4>

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