

# Hinterland connections to seaports

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# Study terms of reference

- To describe and analyse the available information on container and ferry freight transport trends and projections in UNECE region
- To describe and analyse the policy response to traffic congestion and other problems in hinterland connections of seaports

# Report structure and objectives

Study objectives	Section of report						
	2	3	4	5	6	7	8
To determine key issues in existing literature relating to performance of seaports and their hinterland connections	●	●		○	○		
To assess key trends in the container and ferry markets in the UNECE region, including port hinterland flows			○	●	○		
To identify best practice in achieving efficient and sustainable hinterland goods movements			○		●		
To consider ways in which the specific problems faced by landlocked emerging economies can be overcome					●	○	○
To recommend ways in which the connectivity of seaports and their hinterlands can be improved						●	●

Key: ● – strong relationship; ○ – lesser relationship

# Responses to UNECE questionnaire

<b>Country</b>	<b>No. of responses</b>	<b>Ports included</b>
Belgium	1	Zeebrugge
Bulgaria	1	Bourgas
Germany	1	Bremen-Bremerhaven
Latvia	1	Riga (Baltic Container Terminal)
Lithuania	1	Klaipeda
Poland	3	Gdansk, Gdynia, Szczecin-Swinoujscie
Spain	4	Algeciras, Bilbao, Las Palmas, Valencia
Switzerland	1	Basel
Turkey	13	Akdeniz, Bandirma, Borusan, Derince, Gempport, Haydarpasa, Iskenderum, Izmir, Mardas, Marport, Mersin, Samsun, Trabzon
United Kingdom	1	Dover
<b>Total</b>	<b>27</b>	-

# Questionnaire survey representation

- 10 UNECE countries represented
- 48% of response are from Turkey
- No respondents from:
  - North America
  - Scandinavia
  - Other key countries (e.g. France, Italy)
- 6 of the top 20 EU container ports included
- 2 of the top 10 EU ferry ports included
- Not all respondents answered all questions

# Extent to which transport modes currently satisfy the requirements of container flows through the port

	Average	Standard dev.	No. of observations
Road	8.1	1.63	25
Rail	6.8	2.73	18
Inland waterway	5.8	2.86	5
Short sea shipping	7.6	2.59	10
Coastal shipping	7.3	2.83	10

(for average, 1 = very inefficient, 10 = very efficient)

# Extent to which performance of transport modes is likely to change in the next 10 years for container flows through ports

	Average	Standard dev.	No. of observations
Road	8.3	1.97	25
Rail	8.1	1.74	22
Inland waterway	6.6	2.88	8
Short sea shipping	8.2	1.72	13
Coastal shipping	7.7	2.02	13

(for average, 1 = become much worse, 10 = become much better)

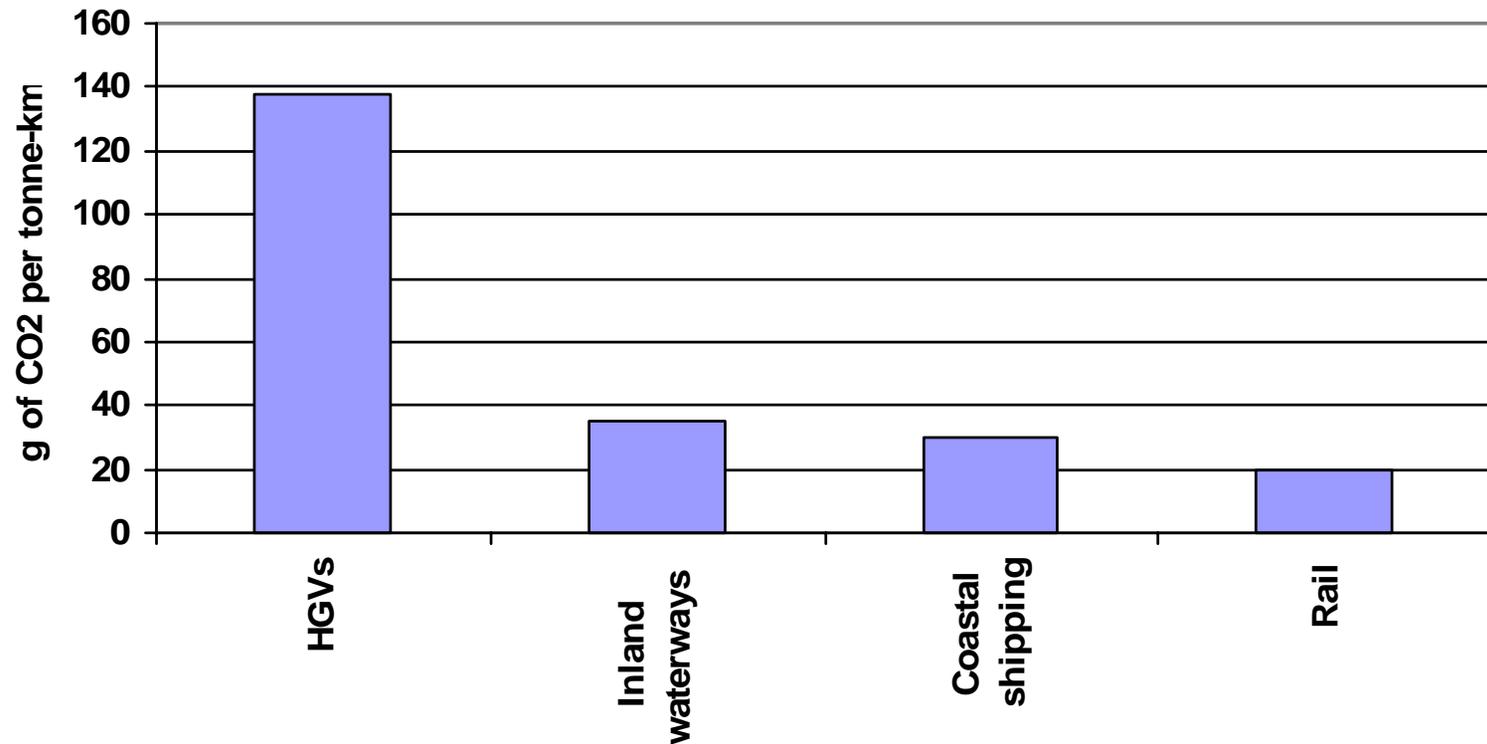
# Efficiency issues: comparison of time, cost and number of documents for export from UNECE countries

	Documents for export (number)	Time for export (days)	Cost to export (US\$ per container)
Finland	4	8	495
Tajikistan	10	82	3,150

Source: World Bank (2008)

- large variations between countries, but landlocked countries generally disadvantaged
- high cost and time of trading with and from emerging Central Asian economies is evident from the data

# Sustainability issues: estimated average CO<sub>2</sub> intensity values for freight transport modes



Source: adapted from McKinnon (2007)

# Examples of 'best practice' actions

- Modal shift from road to alternative transport modes
- Efficient capacity utilisation
- Effective 'partnership' working
- Other more efficient/sustainable practices

# Proposed evaluation framework

- Following on from identification of key issues and 'best practice'
- Sequential approach:
  1. Measures to promote efficient and sustainable network of hub and feeder ports
  2. Encouragement of modal shift from road to rail/water
  3. Actions to enhance efficiency of utilisation of each mode

# Elements to consider in evaluation

- Physical infrastructure:
  - Ports
  - Transport routes
  - Inland terminals
- Political and regulatory aspects
- Development of new working practices to remove obstacles and improve efficiency
- Policy measures to influence behaviour
- Interrelationships with existing policies

# Assistance from expert group

- Higher (and more representative) response rate needed for maximum benefit
- Other examples of 'best practice' that fit with the analytical framework
- Guidance on information sources (ideally in English) for non-EU countries
- General feedback about partial draft report...