Rotterdam and the Hinterland

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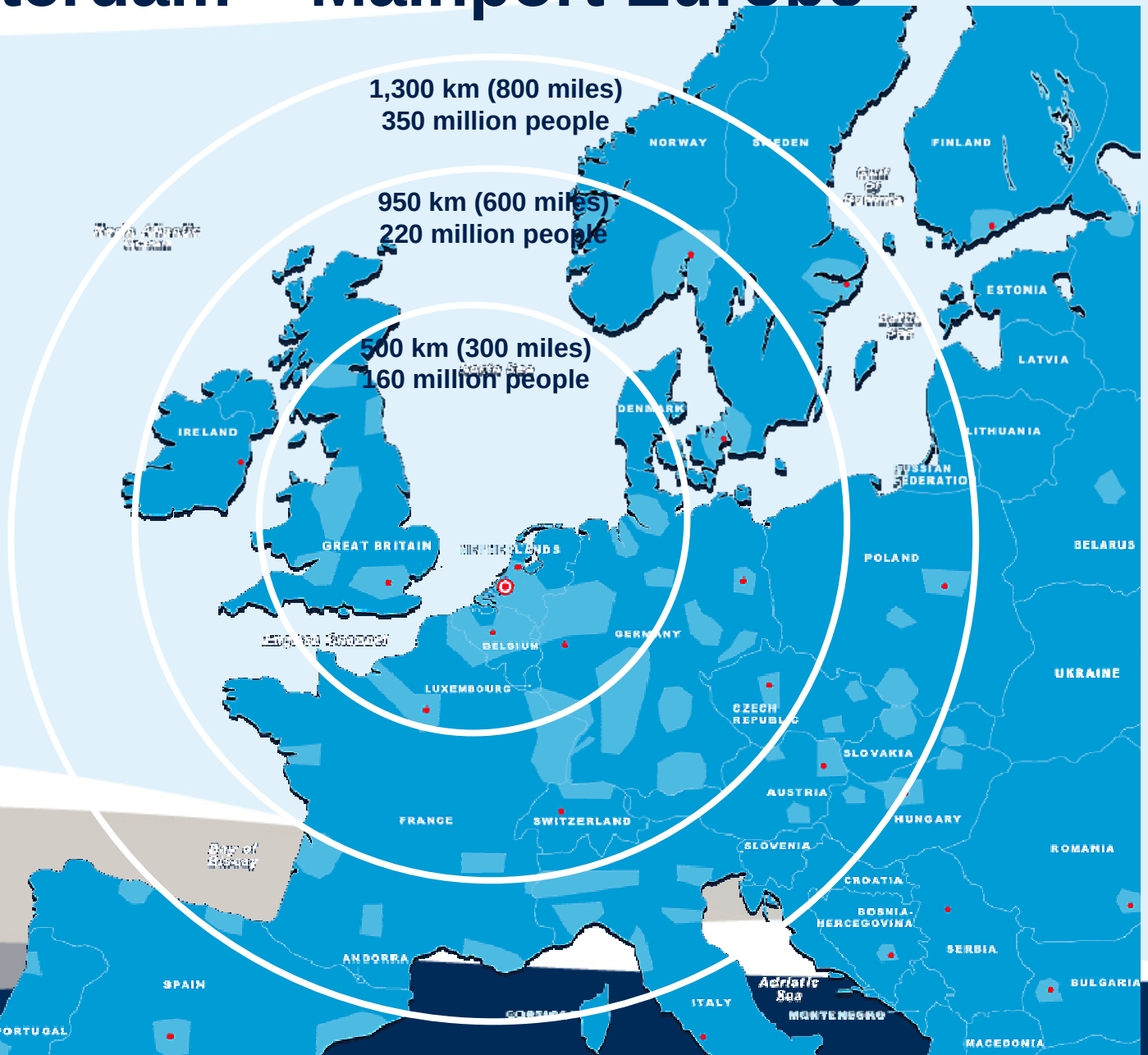
Rotterdam – Mainport Europe



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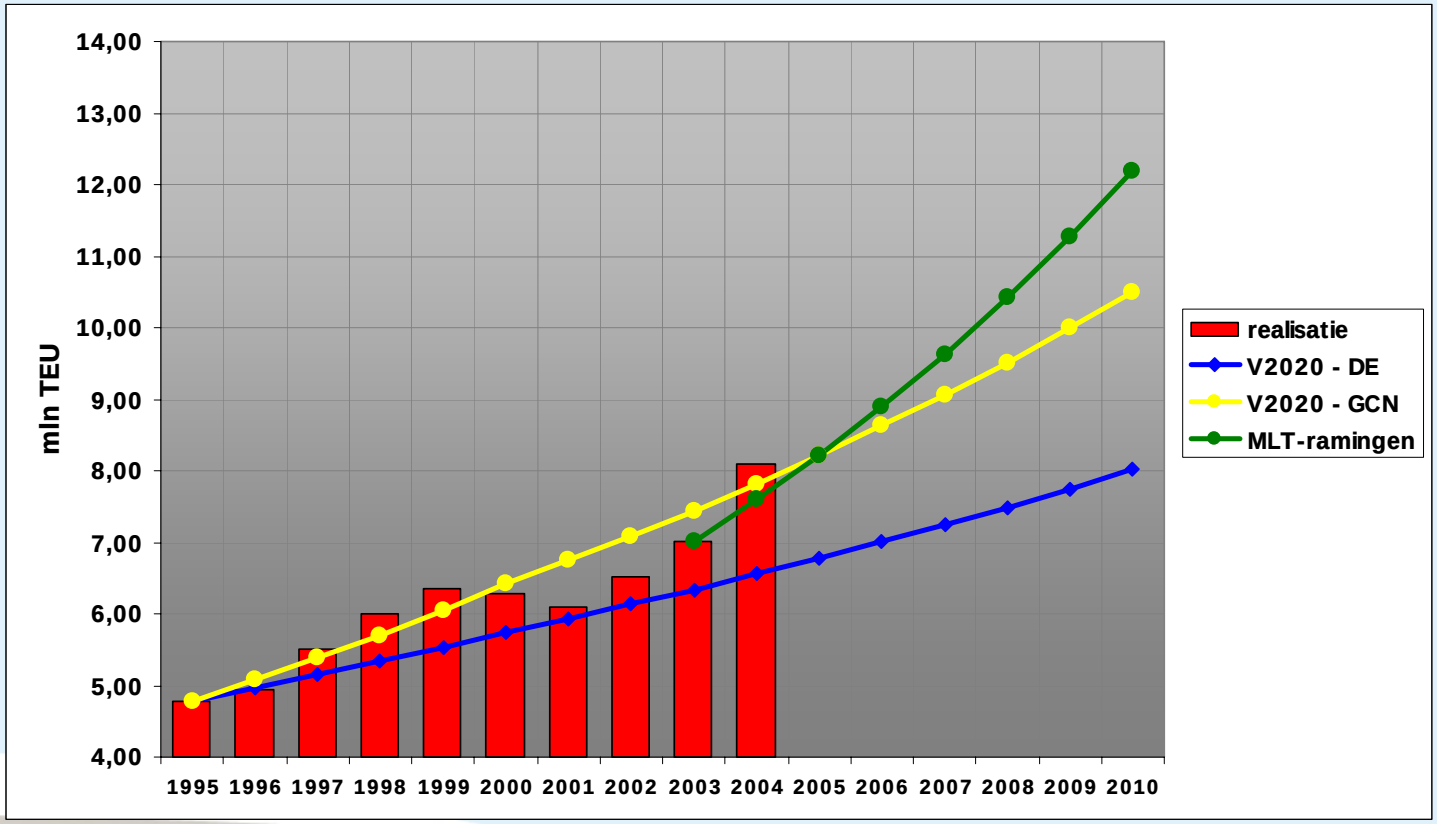
Container throughput Rotterdam results and forecast (2005 / 06)



2005 results 9.3 million TEU → 2006 9.6 million TEU
2010 forecast: > 12.0 million TEU (above the GC scenario)

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Enormous growth of transport expected

Some forecasts:

- Total through put

2006	377.4 milliion tons
2030	800 million tons (Hamburg Welt Wirtschaft Institute)

- Container throught put

2006	9.6 million TEU
2015	20 milliion TEU (figure DB)
2025	30 million TEU (projection PoR)

Enormous flow of containers expected

“Emma Maersk”

13.000 TEU

Hinterland transport

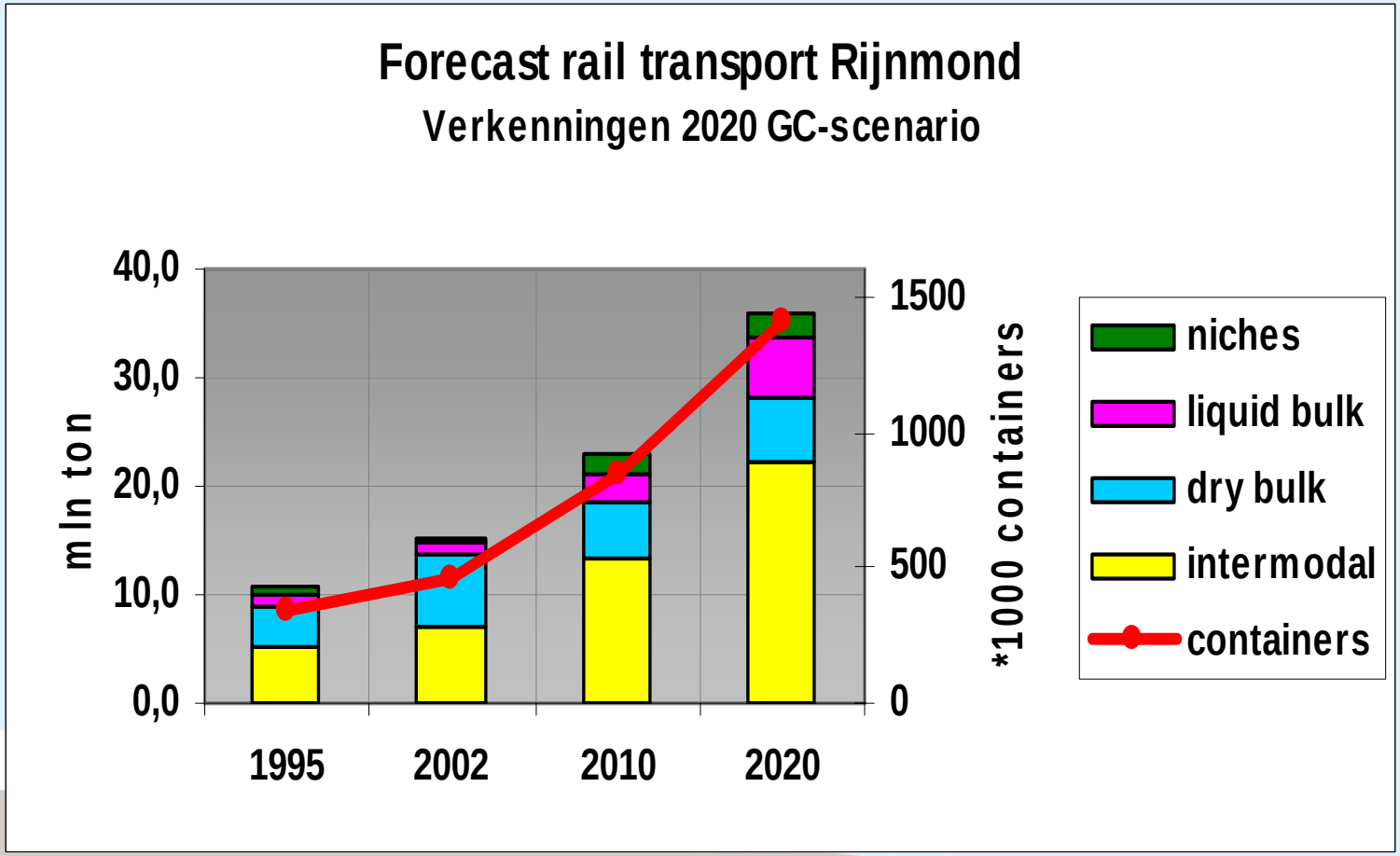
Hinterland transport

Modal split of all cargo into & out of the Port of Rotterdam

- 48% Barge
- 5% Rail
- 21% Pipeline
- 26% Road

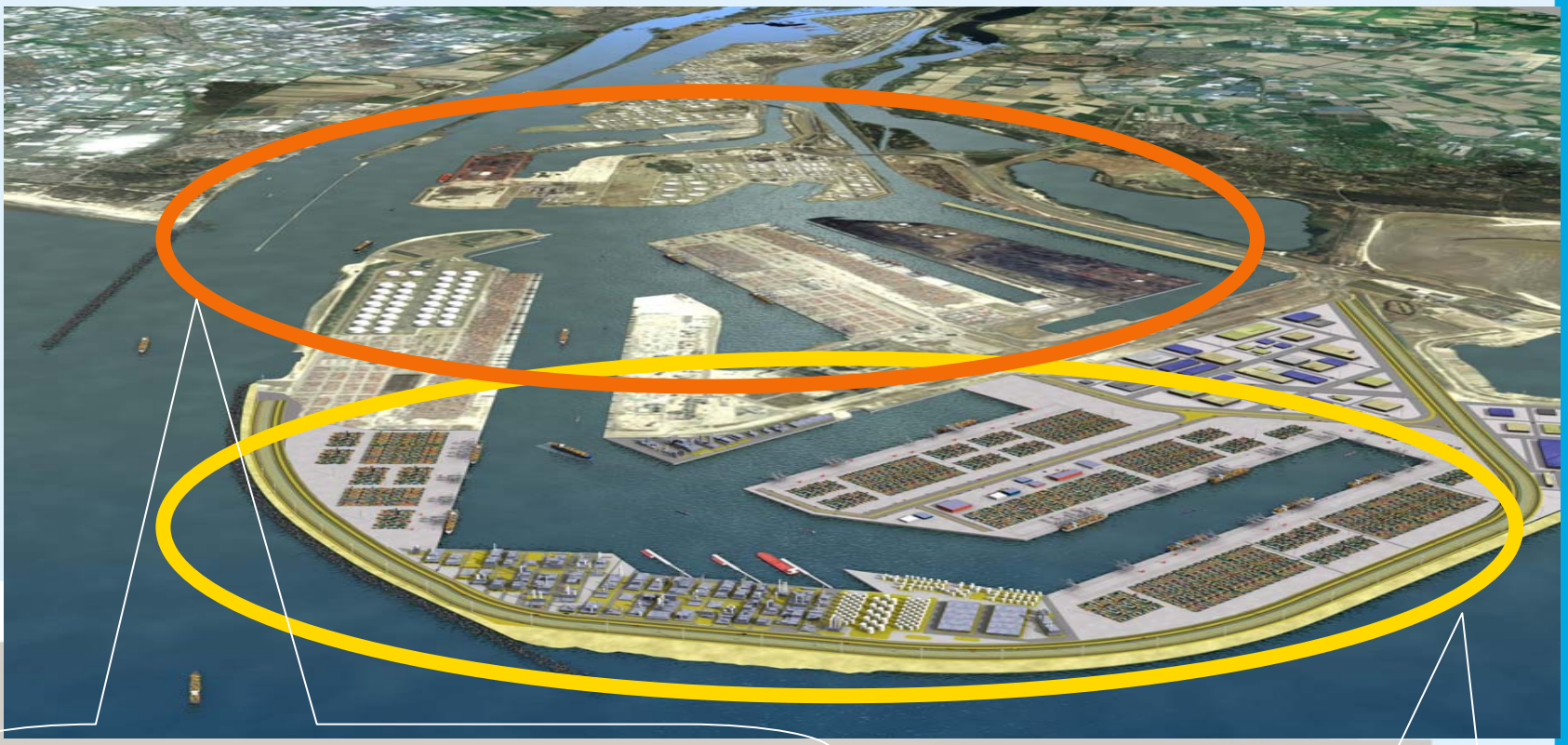
This 5% needs to be improved the next years

Market forecast rail transport



Investing in infrastructure

- A more intense use of the existing port area &
- Port extension (land reclamation from the sea)



Maasvlakte 1: ECT (Delta & Euromax) & APM-T (Maersk)

Maasvlakte 2

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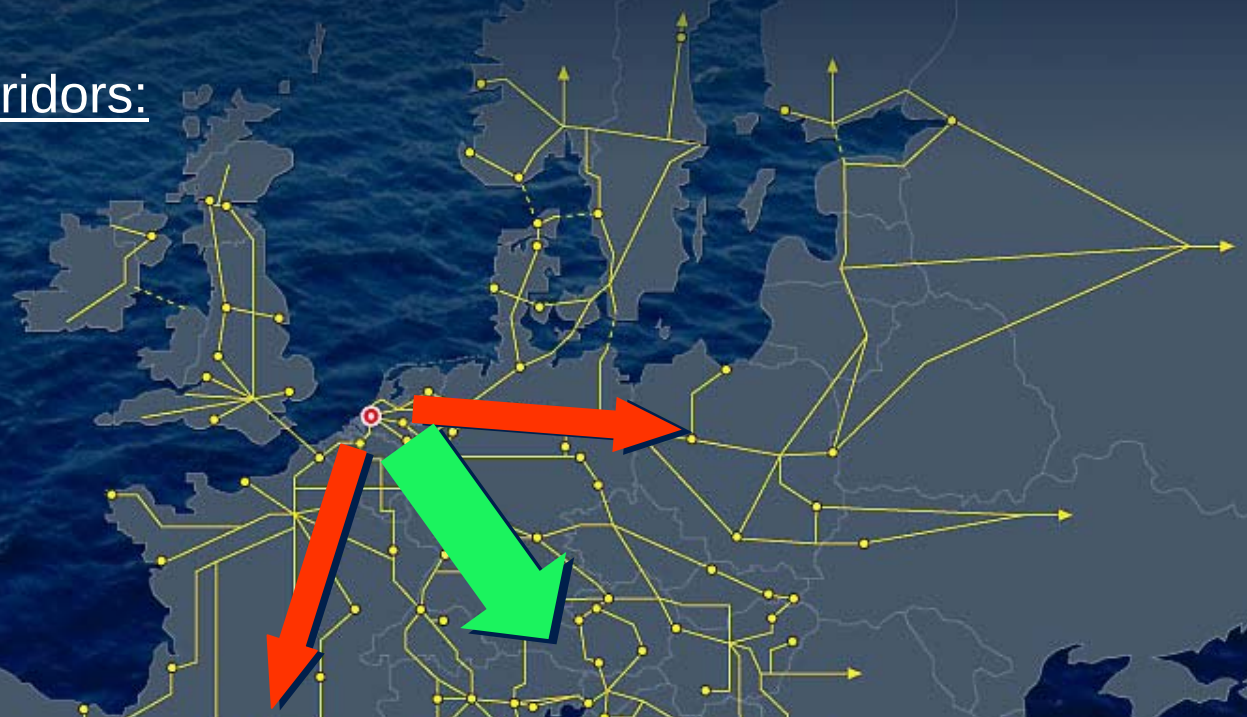
Need for optimal RAIL connections

Relevant TEN corridors:



Primary focus on the market in Central and Eastern Europe:

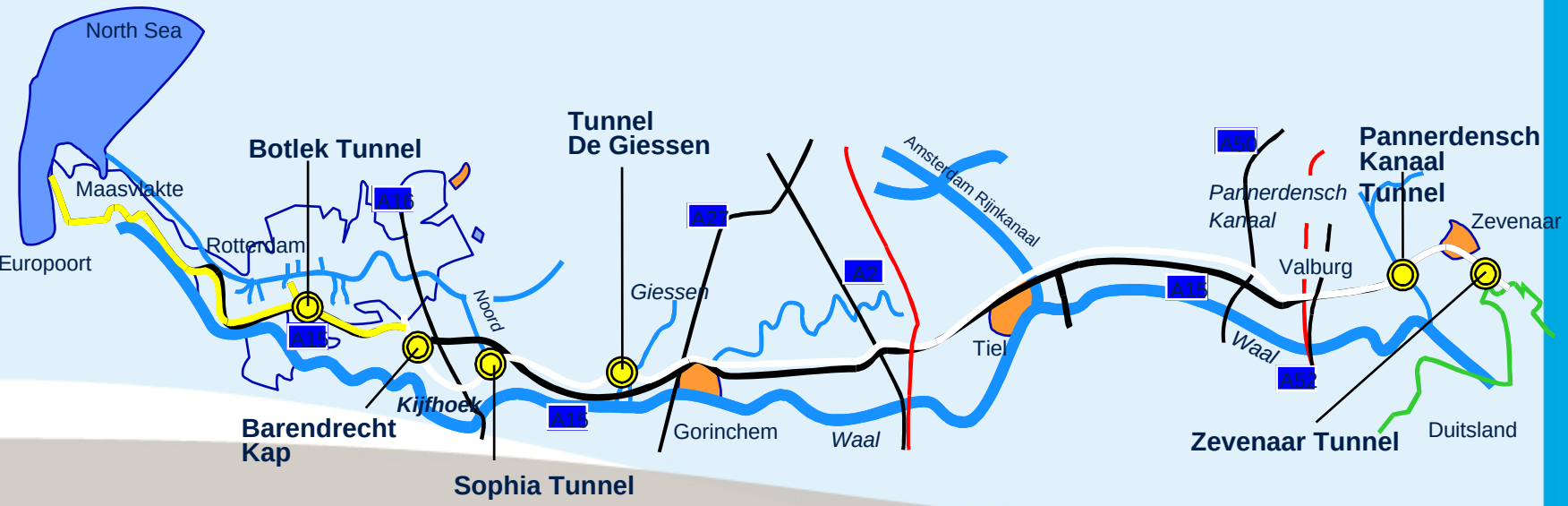
- Paris – Strasbourg – Stuttgart – Vienna – Bratislava
- Rotterdam – Duisburg – Basel - Genoa

Secundary focus:

- Rail corridors Rotterdam – Poland & Rotterdam – Lyon & Barcelona

Betuwe line: a dedicated rail feight connection

- Port of Rotterdam to the German border: a.s.a.p. in operation
- German connection is essential (Emmerich – Duisburg): recent agreement Netherlands & Germany on 3rd track!
- Still some (actual & future) bottlenecks in Germany: sollutions needed → 2010 - 2020



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0 10 20 30 KM

Rotterdam – North-Rhine Westphalia

Optimal use of the first step in the Rail corridor essential:

→ **Betuwe line + track to Ruhr area**

- Extended gate concept: customs
- Modal shift: from road to rail & inland barge
- Reduces dwell times; more efficiency

→ Development of turning table NRW (Duisburg)

→ Next step: Main Neckar area

Port of Rotterdam and the connections to the Central Europe hinterland

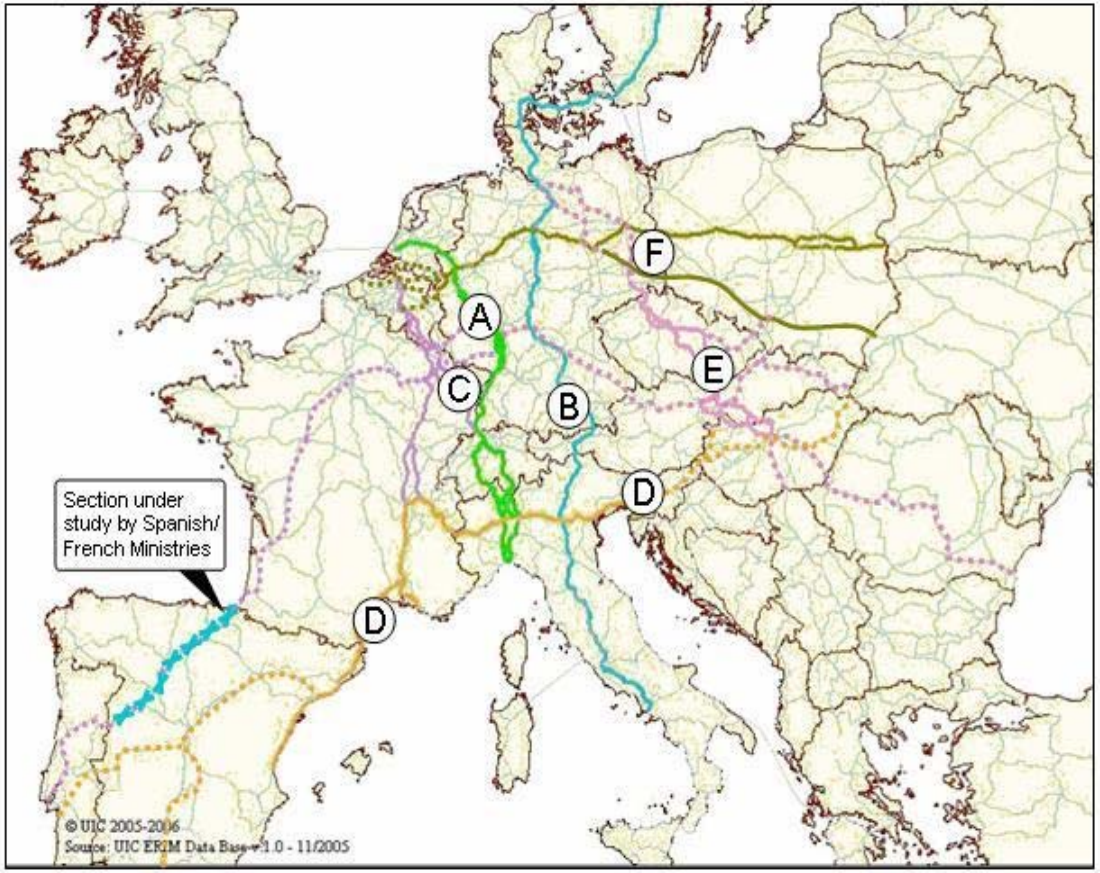
- Bavaria, Austria, Czech Republic, Slovakia, Hungary & Southern Poland.
- Need for new (additional) direct rail shuttles

Why?

- Growing markets: improve Rotterdam market share
- Roads congested & relatively small network for inland barges
- Severe competition on rail with German ports

6 business cases on 6 core European freight corridors (based on the ERTMS corridors)

+++ Still studied — ERTMS corridor
····· Extension



6 core corridors

- (A) Rotterdam – Genova
- (B) Stockholm – Bologna
- (C)/(D+) Antwerp – Basel/Lyon/Lisbon/ Algeciras/Porto de Sines
- (D+) Lyon – Zahony
- (E+) Hamburg/Mainz – Constanta
- (F+) Zeebrugge – Terespol/Medyka

Why these corridors?

- Representing ~ 35% of total European rail freight volumes
  - ~ 25,000 track km
  - ~ 400 million freight train km p.a.
  - ~ 135 billion net tkm p.a.
- Covering most important freight flows in Europe over 18 countries

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For the 6 corridors, a 61% volume growth is expected until 2020

ESTIMATES

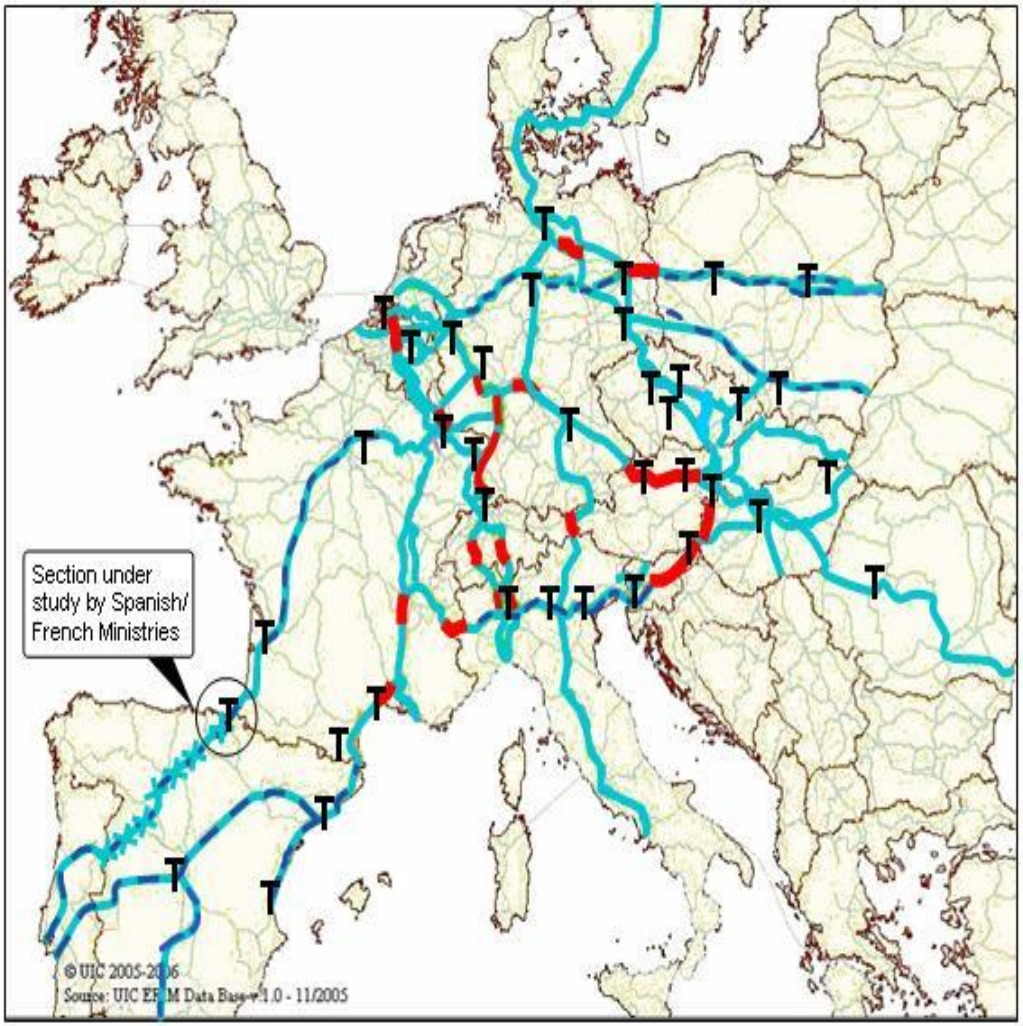
Corridor Name	Countries	Corridor section length km	Volume 2006 Million freight train km	Absolute growth* until 2020 Percent
A	Netherlands-Germany-Switzerland-Italy	~ 2,000	56	86
B	Sweden-Denmark-Germany-Austria-Italy	~ 3,500	62	62
C/D+	Belgium-Luxembourg-Germany-France-Spain-Portugal	~ 8,500	95	63
D+-	France-Italy-Slovenia-Hungary	~ 2,000	22	55
E+	Germany-Poland-Austria-Czech Republic-Slovakia-Hungary-Romania	~ 6,000	88	56
F+	Belgium-Germany-Poland	~ 3,000	77	46
Total		**~ 25,000**	**~ 400**	**Ø 61**

The biggest investment needs result from bottleneck relieves (EUR 120.5 billion)

ESTIMATES

- Estimated investments
- Major bottleneck investments (EUR 0.5 billion or more)
- Still studied
- T Terminal investment

Total investment 2007 – 2020, EUR billions



Corridor investments	Investment EUR billions
(A) • Gotthard tunnel (CH)	6.5
• High capacity line (IT) Genova-Milan-Alessandria	5.0*
(B) • VDE 8.1 ABS/NBS Nürnberg-Erfurt (bottleneck prevention) (GER)	4.2*
• Brenner Tunnel (AUS/IT)	5.1
(C) • Estimate capacity upgrade Spain	9.4*
• Estimate capacity upgrade Portugal	3.0*
(D) • Tunnel France-Italy	7.6
• New high capacity line Slovenia	3.6
(E) • Romania bottleneck relief investments	3.7*
(F) • –	**

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Policy Initiatives

18 October 2007: Publication of the European Commission's Policy Statement on a Rail Freight Network, aiming at:

- Creating "**corridor structures**" of IMs and Member States to manage corridors
- Imposing "**freight quality**" indicators and measurements
- Identifying corridor "**investment needs**"
- Harmonising "**priority rules**" (at "service planning" and during "operations")

ACTION → **Influence European and National policies:**

- Communicate the results of our 6 business cases to the ministries of the countries concerned by our 6 corridors
- Call for "**corridor conferences**" to be organised at minister level to raise awareness of infrastructure needs at the highest level
- Talk to your transport ministry

THANK YOU FOR YOUR ATTENTION

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