

International High Level Meeting on SEE Freight Transport Logistics



SEE Intermodality
SEE Multimodality
SEE Synchronmodality

Plovdiv, 01 September-02 September 2016

South East Europe Co Modality 2016

Collaboration for Co-modality. Modal Shift. Policy and Actions

Under Patronage of:



Ministry of Transport, Information Technologies and Communications

Bulgarian Freight Transport Logistics 2016

Supporting Organisations & Associations:

Executive Agency Railway Administration

National Railway Infrastructure Company

National Company Industrial Zones

Bulgarian Association for Freight Forwarding, Transport and Logistics

Bulgarian Association of Ship Brokers and Agents

Bulgarian Association of Shipowners

Institute of Maritime Economics and Logistics

With kind assistance of:

UIRR-International Union for Road-Rail Combined Transport



Intermodal,



and BULMARKET

Germany

Greece

Poland

Romania

Bulgaria

Croatia

Serbia

Austria

Italy

Turkey



Cooperation, Collaboration, Coordination, Coopetition



*Prospect concept, design and organizing Shortsea and Inland Shipping - Intermodal Promotion Centre Bulgaria
 more information at www.shortsea.bg*

Co Modality - Future of the European Freight Transport

30% of road freight over 300 km should shift to rail/sea/inland waterway by 2030



More Rail Freight. Rail Freight Corridors a good platform for regional cooperation in SE Europe

Key challenges for rail freight transportation: A quality challenge; A cost challenge; A service challenge; A political challenge. Importance of the Rail Freight Corridors (RFC): Rail transport-Freight focus; Dedicated governance structure for each RFC. The Rail Freight Corridors are rail freight backbone of the Core Network Corridors. Core Network Corridors: Multimodal -rail, road, aviation; inland waterways and ports-for passenger

and freight traffic. Success factors for RFCs: Operational "soft" measures: Harmonisation of operational rules and terms & conditions for infrastructure usage; Interoperability on cross-border sections and train handling procedure in border stations; Co-ordinated traffic management and harmonised quality and performance monitoring across corridors; Infrastructural "hard" measures; Deployment of improved harmonised infrastructure standards and ensuring continuity of standards across borders in EU: TEN-T minimum requirements; Development of intermodal terminals and last-mile infrastructure.

Rail Freight Corridors a good platform for regional cooperation in South East Europe -Baltic-Adriatic RFC 5 ; Mediterranean RFC 6; Rhine-Danube RFC 9; Orient East-Med RFC 7. Cargo flows along corridors.

The new TEN-T Guidelines and the Connecting Europe Facility support implementation of an EU freight network that connects TEN-T corridors for different transport modes at strategic hubs. Locations of nodes and freight facilities need to be closely aligned with investment in transport. In addition, landside gateways to Eastern Europe, Turkey and the Middle East will need to be developed.



More Short Sea Shipping. ECSA re Short Sea Shipping: the full potential yet to be unleashed

ECSA policy recommendations: SSS is a vital part of the EU intermodal supply chain infrastructure.

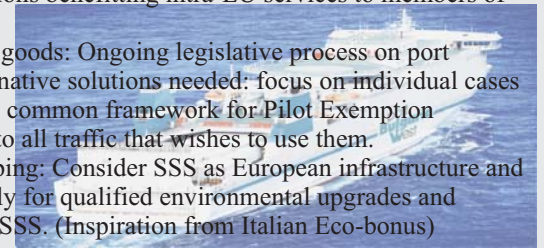
• Identify all barriers that prevent the development of true Motorways of the Sea. Launch an intra-Commission REFIT-style task force to identify key barriers. Listen to all stakeholders and act fast

• Complete the single market for shipping: The internal market one of the biggest successes of EU, but some sectors are not there, including shipping. Most agree on the benefits of SSS, so let us now get it done.

• Simplify procedures for regular short sea services with third countries: Simplify and rationalise administrative procedures for short sea services that also call at non-EU ports. Extend the simplifications benefitting intra-EU services to members of the Common Transit Convention.

• Ensure market access to port services and guarantee free movement of goods: Ongoing legislative process on port regulation will not deliver expected results on "open market access". Alternative solutions needed: focus on individual cases and a more structured approach to TEN-T. Commission should also set up common framework for Pilot Exemption Certificates (PECs) In order for SSS to prosper, ports need to remain open to all traffic that wishes to use them.

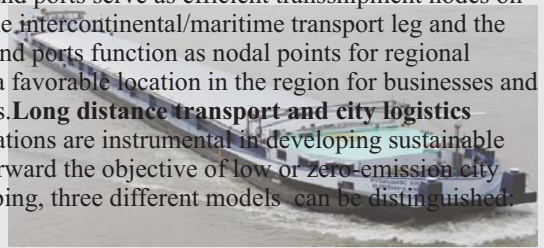
• Devise competition neutral ways to financially stimulate short sea shipping: Consider SSS as European infrastructure and "relax" requirement under CEF facilities. Support "first-movers" financially for qualified environmental upgrades and retrofits. Consider financial incentives for the demand side (customers) of SSS. (Inspiration from Italian Eco-bonus)



More Inland Waterway. EFIP Position paper on multimodality & logistics in inland ports

The platform for multimodality and logistics brings together inland ports, logistics and port operators, as well as shippers. European inland ports play a crucial role in the multimodal transport chains as they provide transfer points to other modes and are connected with logistics centers, industrial areas, agricultural areas or large consumer markets such as metropolitan areas. The inland waterway transport (IWT+Ports) network has limited

coverage in Europe, the collaboration between IWT and railways can offer sustainable transport solution in Europe through their interconnections in inland ports. We identified the following roles that inland ports can play - some of these can be combined: **Multimodal hub on the European Transport Corridors:** inland ports serve as efficient transshipment nodes on the European inland waterway corridors. They are the interface between the intercontinental/maritime transport leg and the land modes of transport -rail, road and IWT. **Platform for the region:** inland ports function as nodal points for regional economies. As well as their transport and logistic function, the ports have a favorable location in the region for businesses and industries close to large-scale production/distribution or consumption areas. **Long distance transport and city logistics interface:** inland ports located in an EU capital or major urban agglomerations are instrumental in developing sustainable city logistics. Cargo bundling, innovation and smart solutions can bring forward the objective of low or zero-emission city logistics. In intermodal transport in general and particularly in inland shipping, three different models can be distinguished: point to point, hub & spoke and pendulum services.



More CombTransport. Recast CT Directive 92/106. UIRR Freight Transport Policy Expectations

The first European legislation concerning the common rules to be applied to Combined Transport dates back to 1975, attesting to the recognition by the Institutions of the importance CT can deliver to the wellbeing of Europe. The Directive (92/106) in its present form has last been revised 22 years ago, meaning that it is ripe for a thorough recast and updating to continue its mission of providing the framework of CT's development as

well as compensating it for the adverse effects of the prevailing regulatory imbalances. The six points of the UIRR's proposal to guide this recast can be found here: 1. Definitions and legal framework; 2. Temporary benefit rules; 3. Infrastructure optimized to intermodal/combined transport; 4. National intermodal/combined transport development plans; 5. Intermodality test; 6. Intermodal/combined transport statistics and reporting.

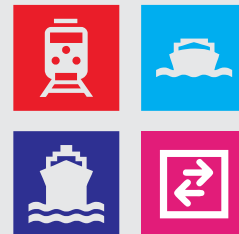
Proposed Legislative Actions to the 2019:

- Enact the amendment of the Directive 96/53/EC regarding weights & dimensions as adopted in first reading in April 2014;
- Conclude the Fourth Railway Package Technical and Governance Pillars as proposed by the European Commission,
- Adopt the revision of the European Excise Duty Directive (2003/96/EC) as proposed by the Commission (COM/2011/169),
- Recast the Combined Transport Directive (92/106/EC) to become an effective temporary mitigation and promotion tool;
- Recast the Eurovignette Directive (1999/62 modified twice by 2006/38 and 2011/76) into the eToll Directive;
- Consistently monitor the progress of implementation of adopted laws through consideration of the Commission's Reports;
- Participate in the mid-term review of the Commission's Transport White Paper and the Freight Logistics Action-Plan.



PROGRAMME - Themes, Topics, Meetings, Discussions

SEE Co-Modality 2016, International High Level Meeting Bulgarian Freight Transport Logistics 2016



Accent: Cooperation for Co-Modality in South East Europe.

Main: Modal shift - More Freight2Railway, Freight2Short Seaway, Freight2Inland Waterway

On focus: Bulgaria, Greece, Romania, Serbia and Turkey

Plovdiv, 01 September-02 September 2016

PROGRAMME - Themes, Topics, Meetings, Discussions, Networking

01 September, 11.00-12.00 h Conference Center PIMK. Reception. Welcome coffee. Business network.
12.00 Official opening. Welcome speech of the Officials-Deputy Ministers BG,RO,GR, VIPs-Chairmen, Executives .
12.15 Bulgarian Freight transport logistics. Bulgarian Intermodal terminals network. Concept, Plans, Realization.
12.30 Co Modality- Future of the Freight transport.EU Agenda: Core corridors+combined transport+digital transport logistics. Modal shift Aim of the EU.Revision of the Combined Transport Directive-EC SWD 2016. Stakeholders Recommendations.
13.00 Intermodal/Combined transportation. Development of the Intermodal CT terminals. Strategies & Business models. Freight Terminal/Freight Villages/Consolidation/Cargo centers. Network. European trends. SEE Best practices.
Speakers: DG MOVE, UIRR, UIC, KombiConsult, HaCon, Kombiverkehr, NRIC, NCIZ, NSBS (TBC)

13.30 Greece. Intermodal/Combined transportation. Greek's Experience in Freight Transport logistics. Freight Terminals/Villages-North Greece Ports - Thessaloniki, Kavala, Alexandroupolis. Port / Shipping Logistics. Intermodal links / Combined transportation Aegean -Danube-Aegean /Romania,Bulgaria,Greece.Strategies&Business models. Partnerships / cooperation/Joint Venture. Potential for MoS Projects RO/BG/GR to East Med, North Africa/Magreb.
14.00 Romania. Intermodal/Combined transportation. The Romanian Experience in freight logistics. Potential for cooperation. Freight transportation RO-BG-GR.Alliances for Freight Logistics Partnerships.Common actions.Strategies&Business models.
14.30 Spain/Italy. Multimodal corridor /RO-BG,GR/TR-ES. Port of Alexandroupolis Terminal/ Freight Village Development. Consolidation of the freight flows. Freight integrators. View point of Grimaldi, EENMA and Port of Barcelona/Valencia.
Speakers: RIA, EENMA, ELIME, BASBA, Port of Thessaloniki/Alexandroupolis, Grimaldi, Port of Barcelona (TBC)

15.00 Coffee break. Business network

15.30 Intermodal/Combined Transportation. Corridor Craiova/Vidin-Sofia-Thessaloniki. Cargos, Freight integrators. IW Freight Logistics+ rail+sea. Alliance for Action/ Stakeholders Working Group for Development. GR/BG/RO
16.00 Intermodal / Combined Transportation / Corridor Giurgiu / Ruse - Plovdiv- Alexandroupolis. RO,BG/GR Cargos. Freight integrators. Freight Logistics. Alliance for Action/Stakeholders Working Group for Development.
16.30 Intermodal /Combined Transportation / Corridor Sofia-Plovdiv-Burgas Port.(Ro-Ro/Pax to Georgia/Russia.) Cargos. Terminals. Freight Logistics. Alliance for Action/ Stakeholders Working Group for Development.
17.00 Industrial cargo potential Sofia-Plovdiv-Burgas. Regional Freight logistics (Burgas / Alexandroupolis/Istanbul) Consolidation/Cargo Centers. Freight terminals. Regional Freight Transport Logistics Board/Council. (Location-Plovdiv)
17.30 PIMK Intermodal. Corporate presentation. PIMK Rail. PIMK Logistics.
Speakers:BRP,RCCI,BRC,Port Burgas/PBM,/Port of Thessaloniki,NSBS, PIMK Next Logisitc, Port Ruse (TBC)

19.00 Cocktail

02 September Plovdiv, PIMK Conference center
9.00-9.30 Welcome Coffee. Business network
9.30 Bulgarian Freight Transport Logistics Platform. Stakeholders outlook /perspective re cooperation/collaboration. Viewpoint / State point of the Shippers. (Chemicals, containers)
Viewpoint / State point of the Freight Logistics Operators.(Port Logistics, Shipping Logistics, CT Logistics)
Viewpoint / State point of the Freight Terminal Operators.(Rail Terminal, Port Terminal, Industrial Terminal)
Viewpoint/State point of the Administrations. (EA Railway Administration, EA Maritime Administration)
Speakers: Aurubis, Stomana/Sindos, Bulmarket DM, Solvay, MSC, Bulgarian River Shipping (TBC)

11.30 -12.00 Establishment & Development of Bulgarian Combined Transport Operator. Benefits for the CT operator. BG Combined Transport Alliance. Inauguration of the Bulgarian Combined Transport Operator/Bulgaria Combi.
12.00 Signing a Memorandum "On Bulgarian Freight Transport Logistics 2020"
12.30 Visit to the New Intermodal Terminal Plovdiv. Introduction of Mr. Hristo Alexiev, Deputy Executive Strategy Development of NC "Rail Infrastructure"
14.00 Meetings/Workshops re Collaboration/Cooperation for Freight Logistics/Intermodal/Combined transportation (TBC)

FACTS Core Rail Freight Corridors

European, regional and national
 EU Freight OEM corridor: Vidin-Sofia-Thessaloniki
 National Freight corridor ERTMS: Sofia - Burgas
 Regional rail freight corridors with business potential:
 Sofia - Bucharest; Sofia - Thessaloniki; Sofia - Burgas;
 Sofia - Belgrade - Zagreb - Ljubljana - Austria - Italy
 Intercontinental via Ferryboat complex /Ro-Ro-Pax
 New Silk Sea Sofia-Varna/Burgas - Central Asia - China
 New Silk Rail Sofia - Plovdiv - Istanbul - Iran - China

FACTS Intermodal Terminals, Cargo Centers

Company Railways Terminals - BDZ Cargo, M&M, DB Schenker, Transexpress, Metalimpex, etc.
 NC Railway Infrastructure + BPI Co. Intermodal Terminals - there are six planned in period 2015 - 2020: Vidin, Ruse, Plovdiv, Sofia, Varna and Burgas.
 Specialized Ro La terminals in Dragoman and Svilengrad
 Cargo Centers-planned in Sofia-Bojurishte, TEZ Plovdiv and Burgas - Dry Logiports / Logistics cluster

FACTS Core Sea & Inland

Inland Port Terminals - 3R
 More of 50 berths - terminals
 bulk cargoes: metals, chemicals
 Core port Vidin, Ruse, Trigrad
 BRP, FZ Ruse, Intermodal
 Sea Port Terminals - Varna
 more of 100 berths. Ro-Ferry
 Planned: New Intermodal
 New Ferry RoPax terminal



Rail ports
 Sofia, Varna, Burgas
 Plovdiv, G. Oryahovitsa



Sea ports
 Shortsea shipping
 Motorway of the sea
 Varna, Burgas



Inland ports
 Inland shipping
 Sea-River shipping
 Vidin, Lom, Ruse



Dry ports
 Intermodal terminals
 Acting and planned



Air port
 Sofia, Burgas, Plovdiv
 Air Freight Centers



Freight villages
 Cargo centers
 planned

*"Coming together is a beginning.
 Keeping together is progress.
 Working together is success."
 (Henry Ford)*

Coordination, Cooperation
Main: Modal shift - More Freight2Rail



Strategic collaboration alone will not suffice. The business community must also simplify

NINA Program 2015 - New Intermodal Network

Step 1 Build terminal network	Step 2 Terminals engage shippers	Step 3 Definition of hot lanes	Step 4 Shippers commit volumes	Step 5 Buying the intermodal services
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Transport Logistics Platform

...ics. The business community must come together.

Bulgaria Intermodal

Inland Port Terminals

R Centres-River+Rail+Road:
 Terminals for containers general and
 chemicals, heavy cargo ...
 Multimodal port in Bulmarket Ruse,
 Inland terminal in Ruse Port.
 Varna and Burgas ports are with
 Ferry in Varna, Ro-Pax in Burgas
 Inland terminals in Varna and Burgas,
 Inland in Burgas.

FACTS Industrial & Logistics Zones

Industrial Zones with Logistics Facilities & Freight villages
 potential in Vidin, Ruse, Sofia, Plovdiv, Burgas.
 Sofia-Bozhurishte+logistics zone+intermodal terminal.
 Logistics Sofia - Sofia Airport, Sofia SOMAT, Sofia East
 Ring/Elin Pelin.Economic/Industrial zone Trakia-Plovdiv
 Logistics park/zone Varna, Logistics park/zone Ruse,
 Logistics cluster Burgas-FZ Burgas, IP Burgas, Dry Ports
 Cargo Center + Intermodal Terminal in Plovdiv Region

Reinforcement&Strengthening trough

Vidin Freight Logistics Platform



Ruse Freight Logistics Platform



Burgas Freight Logistics Platform



Plovdiv Freight Logistics Platform



Sofia Freight Logistics Platform



Ether®

Collaboration, Cooperation

Freight2Short Seaway, Freight2Inland waterway



Intermodal freight network

To further streamline logistics in the future,
 we must cooperate at the operational level

Work Approach. The NINA 8 step approach (P&G Concept)

Step 6 Operate the intermodal service	Step 7 Governance of the intermodal service	Step 8 Expand the intermodal service
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Your European Partner

PIMK

International transport company



PIMK Intermodal, Bulgaria
International Transport & Spedition

Next Logistic

- Transport logistics is our business ...

We are open for partnership, cooperation and joint activities in freight transport logistics at West, Central & East Europe



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Green Freight Transport Logistics - Our Corporate Social Responsibility