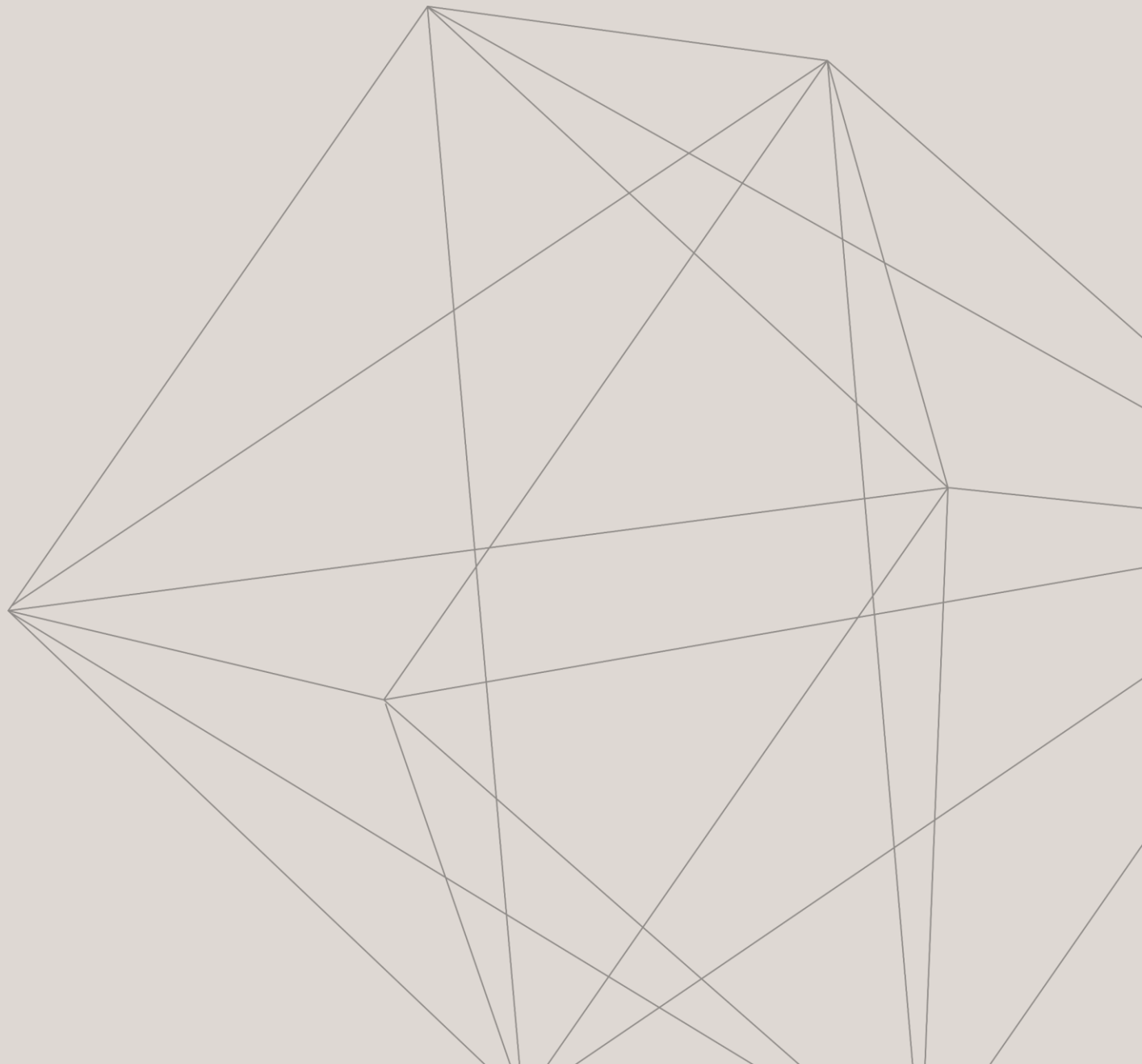




Gaps in regional Port developments in the Danube Region and their influence on the energy transition needs

Outcomes of the DIONYSUS Interreg project
Workshop, 21 September 2023, SEANERGY

www.ic-group.org



Project ID and basic features

DIONYSUS – Integrating Danube Region into Smart & Sustainable Multi-modal & Intermodal Transport Chains

Project objectives:

- Enhancement of multimodal connectivity
 - Assessment of infrastructure needs
 - Matching of port development needs with industry needs
 - Assessment of strategic development gaps
 - Digitalisation strategy & action plan
-

Client: Interreg Danube Transnational Programme Managing Authority / Joint Secretariat

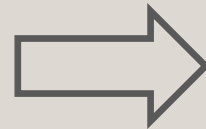
Location: Danube riparian countries

Timeline: 01.07.2020 – 31.12.2022.

Services provided by iC: Assessment of the relevant transport infrastructure, analysis of on-going and planned transport infrastructure projects and gap analysis. Assessment of multimodal facilities and services in ports with related gap analysis and elaboration of the Strategy for the development of the multimodality in ports. Elaboration of dynamic pricing systems as a tool for port development. Matching port development plans with economic development plans and development plans of other transport modes.

ic Wide search for gaps affecting port development and operations

What was our “target rich environment“?



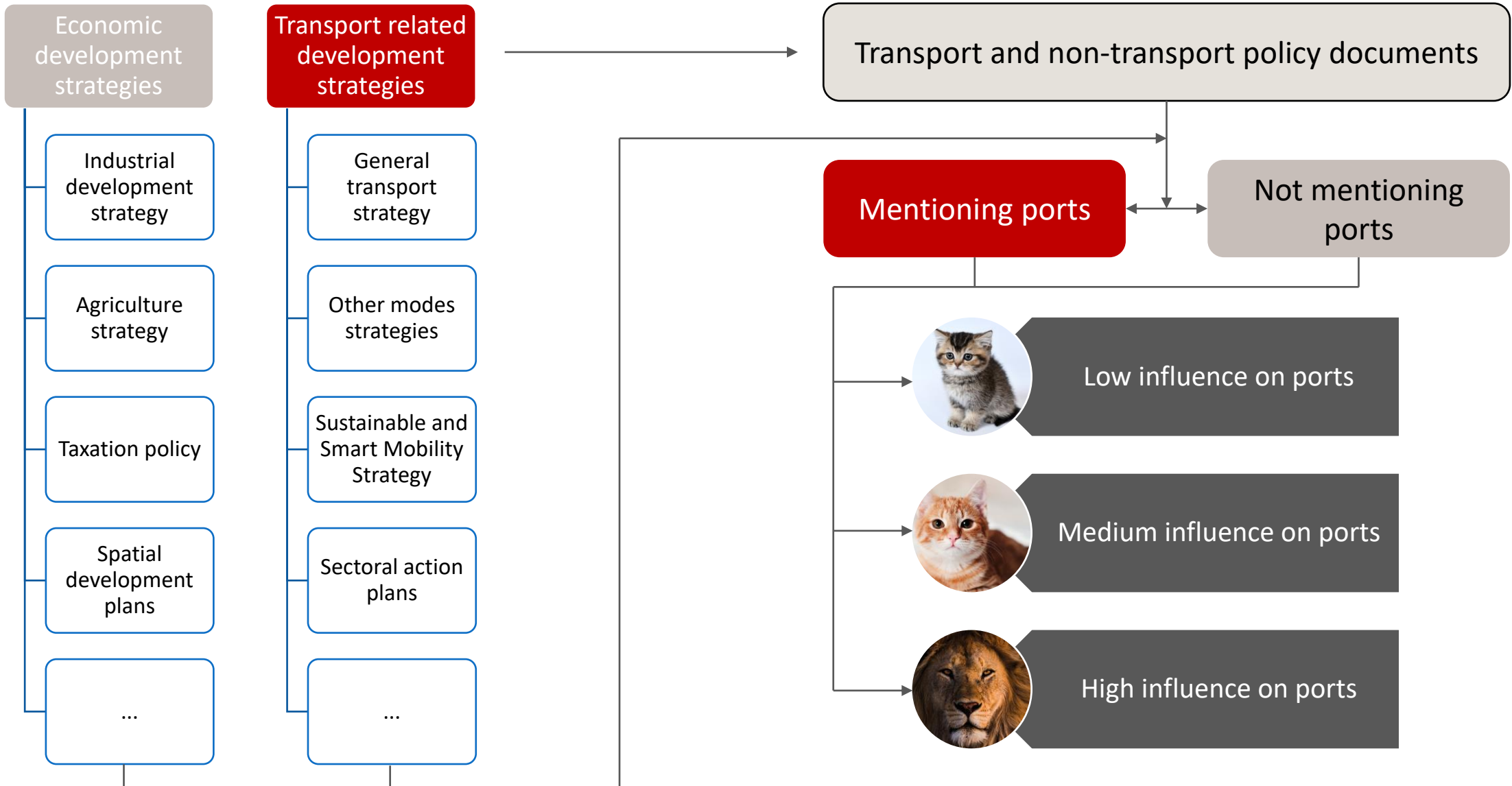
**Economic
development
policy
documents**

**Transport
development
policy
documents**

**Regional,
national,
international**

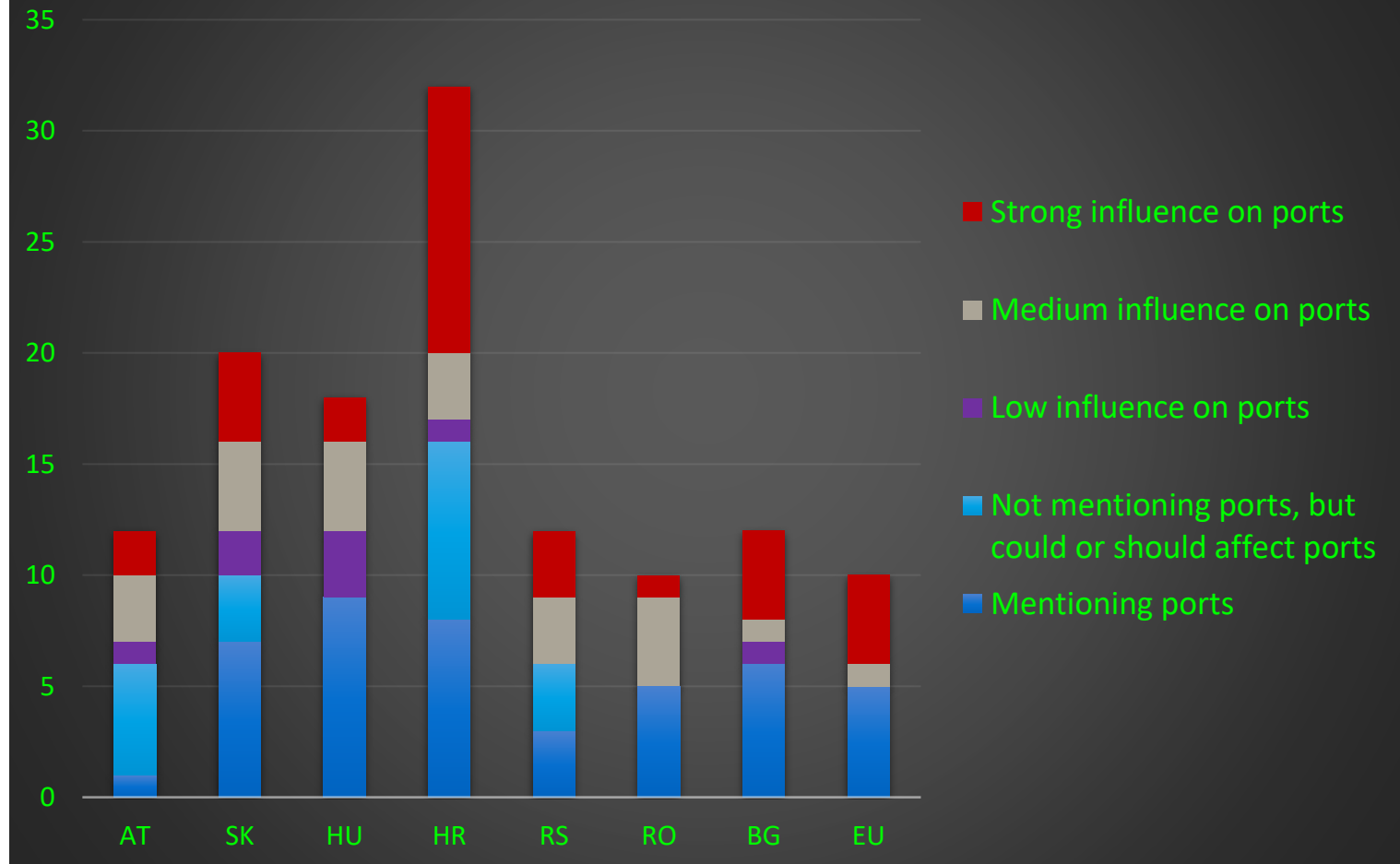
**With existing or
potential
influence on
ports**

iC Target identification process



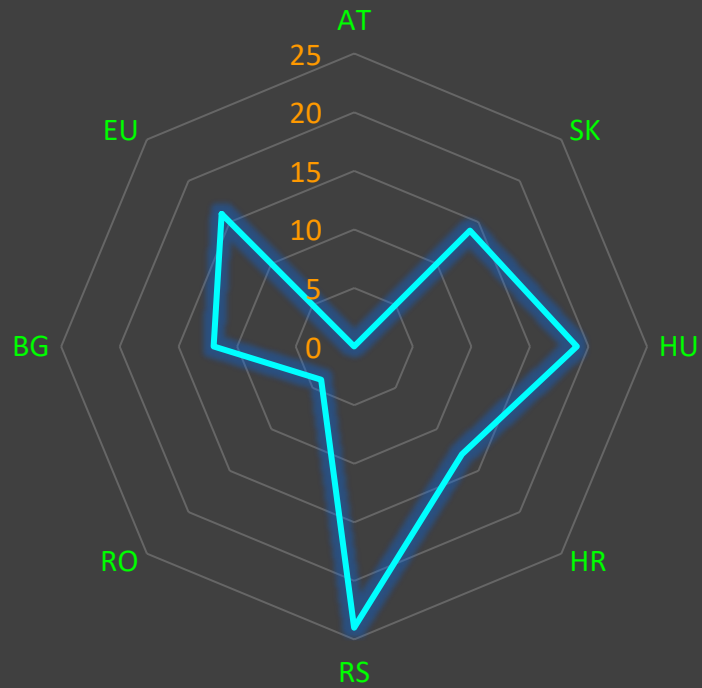
Physical scope of analysed policy documents

Total of 63 analysed policy documents

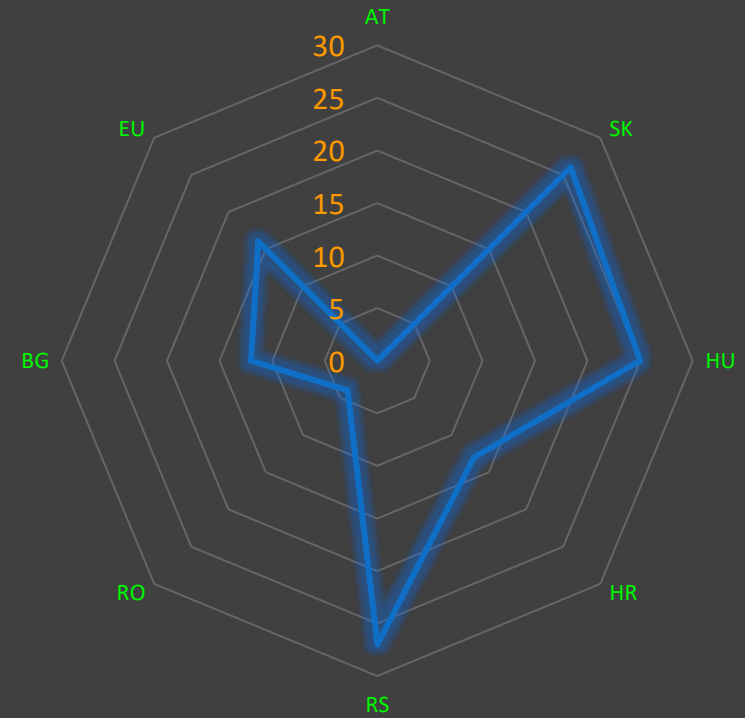


iC Identified development gaps and recommended measures

Gaps (102 total identified)



Measures (123 total proposed)





Examples of identified development gaps and measures

SK

Policy doc

National Investment Plan of the Slovak Republic for the years 2018 - 2030 Pilot Version

Gaps

- Low share of water transport on the market

Measures

- Improve navigation parameters and eliminate bottlenecks on the Danube River.
- Modernize the public ports of Bratislava and Komárno.
- Complete the Váh waterway.

HU

Policy doc

National Shipping Strategy

Gaps

- Very few logistics centres settled by the Danube

Measures

- Construction and modernization of berths
- Trimodal ports with logistics centre (rail and road connection)
- Transshipment ports (road connection)
- Intermittent loading bays (mainly for agricultural products)



Examples of identified development gaps and measures

HR

Policy doc
Agricultural Strategy
2020-2030

Gaps

- Insufficient development founded on using more environmentally friendly and the cheapest modes of transport.

Measures

- Include and stimulate agri development to encourage development of the logistic hubs in ports.
- Backing of the agricultural solutions that are acceptable for environment, climate & animal welfare;
- Development of the agricultural food logistic centres and
- Increase of the rural areas' connection with market.

RS

Policy doc
Industrial policy
strategy of the
Republic of Serbia
from 2021 to 2030

Gaps

- The document does not cover the subject of ports (i.e. establishing industrial zones in the hinterland of ports).
- Still present infrastructure gaps.

Measures

- Support the establishment of industrial zones in the hinterland of ports.
- Prepare programmes for the development of infrastructure tailored to the needs of industrial zones.



Examples of identified development gaps and measures

RO

Policy doc

Strategy on the National Policy Framework for the development of the market regarding alternative fuels in the transport sector and for the installation of the relevant infrastructure

Gaps

- Cost effective solution for the ships with lower emission.
- Technical requirements for Alternative Fuels Infrastructure Deployment (AFID).

Measures

- Research in order to establish the cost-effective solution for the ships with lower emission.
- Research in order to establish the requirements for the port related infrastructure.

BG

Policy doc

Transport Connectivity programme 2021 – 2027

Gaps

- Insufficient investments for the development of *railroad* infrastructure in river port areas.
- Insufficient investments for the development of *road* infrastructure in river port areas

Measures

- Modernization and rehabilitation of railway stations in port cities and of the rail lines Vidin – Sofia, Ruse – Gorna Oryahovitsa and Ruse – Varna.
- Rehabilitation of first, second and third class roads in the regions of Vidin, Montana and Vratsa



Examples of identified development gaps and measures

EU

Policy doc

Trans-European
Transport Network
Policy

Gaps

- Lack of recognition of inland ports as cross-border sections of the transport network.
- Lack of recognition of inland ports as poly sectoral hubs of transport, industry, logistics and energy where sustainable production and cargo operations take place.
- Lack of focus on development of inland ports as decarbonization hubs.

Measures

- Secure full recognition of inland ports as cross-border sections of the IWW network.
- Include inland ports in the new TEN-T policy as poly sectoral hubs, like for maritime ports.
- Secure clear mentioning of inland ports in the new regulation acknowledging their role in IWT and short sea shipping (SSS) as maritime ports have in SSS.

EU

Policy doc

Sustainable and Smart
Mobility Strategy

Gaps

- Inland ports are not fully treated as facilitators, promoters and suppliers of clean energy solutions, sustainable transport and alternative fuels supply.
- Incentive schemes for greening of inland ports are scarce and insufficient.

Measures

- Pursue full endorsement of inland ports, on policy and regulatory levels, as facilitators, promoters and suppliers of clean energy solutions, sustainable transport and AF supply.
- Propose different incentive schemes for greening activities in inland ports.



Examples of identified development gaps and measures

Policy doc
NAIADES III Action
plan

EU

Gaps

- Priority in projects given to undefined “dedicated terminals”.
- Quality of inland port infrastructure is not specified and no criteria and appropriate KPIs are identified to assess the quality of inland port infrastructure.
- No harmonized European inland waterways rules on preventing pollution from ships.
- Lack of recognition of inland ports’ role in creating “Smart inland waterway transport” and adequate financial instruments or call topics.

Measures

- Clearly define the term “dedicated terminals” to neutralize any ambiguous interpretations and misleading of potential project proponents.
- Clearly define the quality of inland port infrastructure, the criteria for quality and design appropriate KPIs to measure the compliance of ports’ infrastructure with the targeted quality criteria/levels.
- Commence work on common regulatory framework for rules on prevention of pollution of inland waterways by ships.
- Secure full and unambiguous recognition of inland ports’ role in creating “Smart inland waterway transport” and provide relevant funding instruments.



Concluding remarks



Level of awareness of inland ports and their importance in the transport network development still needs to be increased.



Various soft and infrastructure measures proposed.



There is still a vast room for improvement on a win-win basis.



Measures identified to bridge the gaps are proposed in such way to not cause any harm or setbacks to other modes or industry in general.

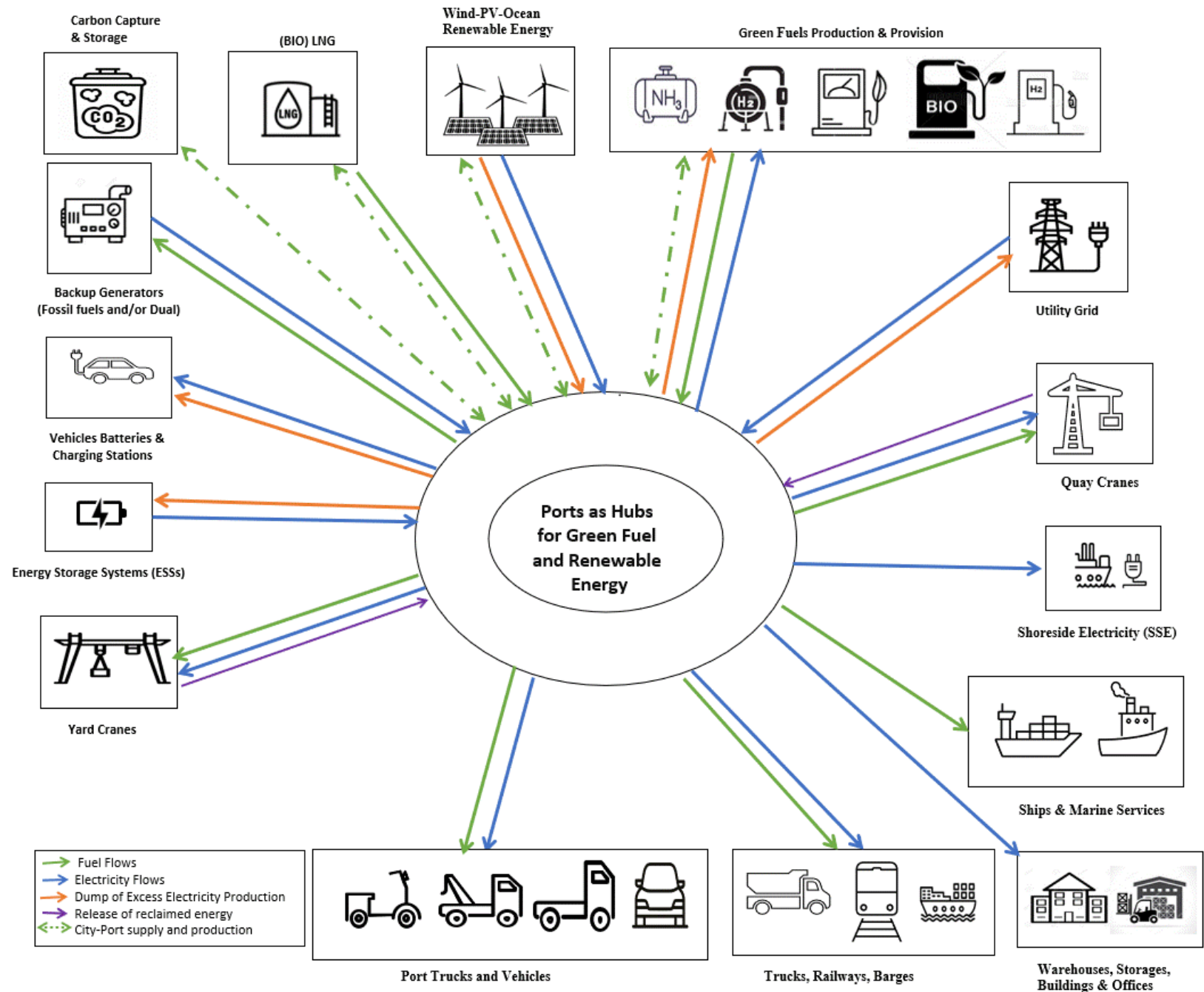


Both sectoral and intersectoral cooperation needs serious improvement for the benefit of the strategic national interests and for the transport network of the Danube region.



Influence on the energy transition needs

Close the gaps and adopt the own port development plans





Thank you for your attention!

www.ic-group.org

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