



Transport and Logistics Development: EU-RUSSIA Context

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Organisation for Economic
Co-operation and Development

Joint OECD/ECMT Transport Research Centre



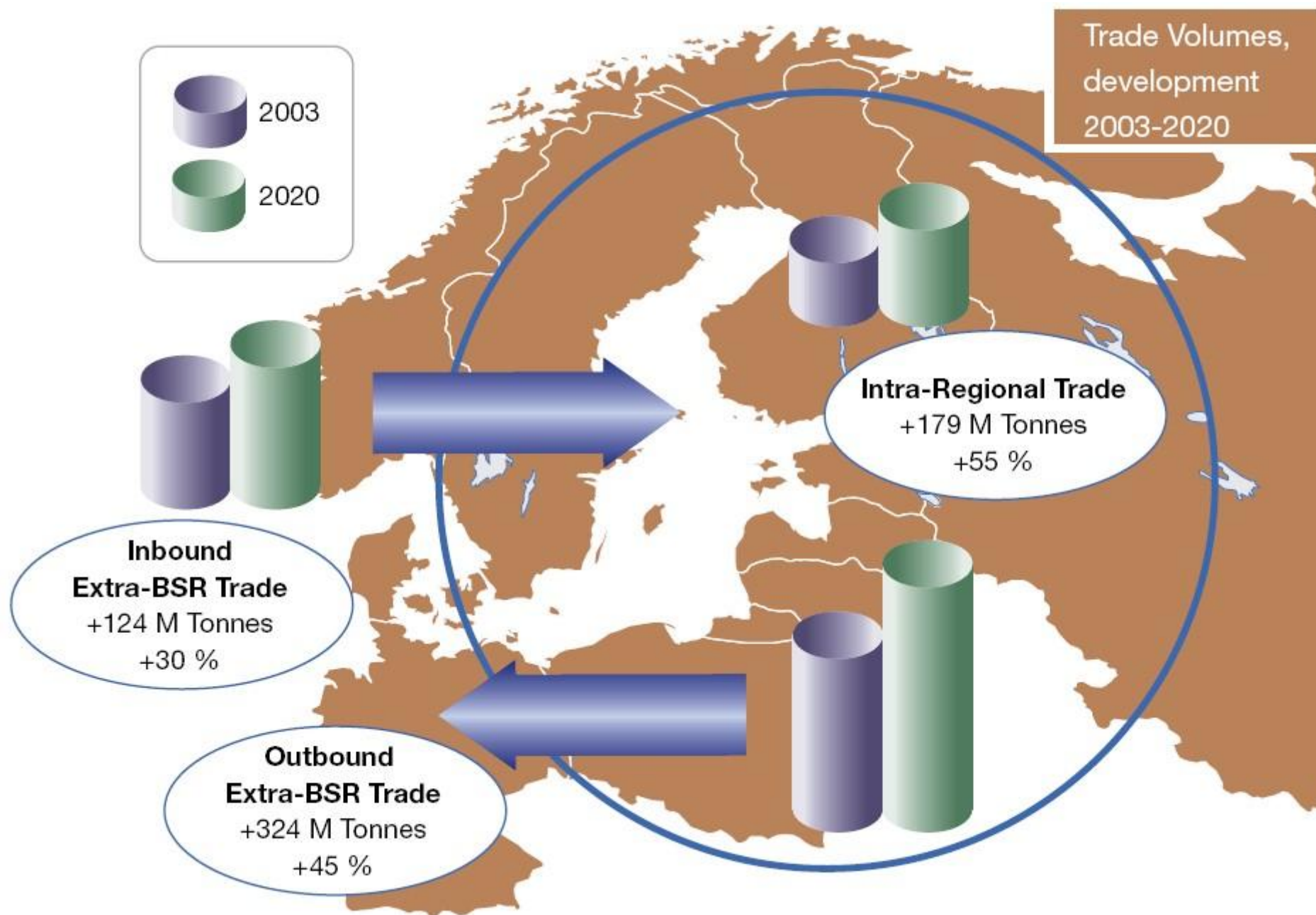
European Conference
of Ministers of Transport

Igor Kabashkin

Dr. hab. sc. ing., Professor
JTRC Committee Member

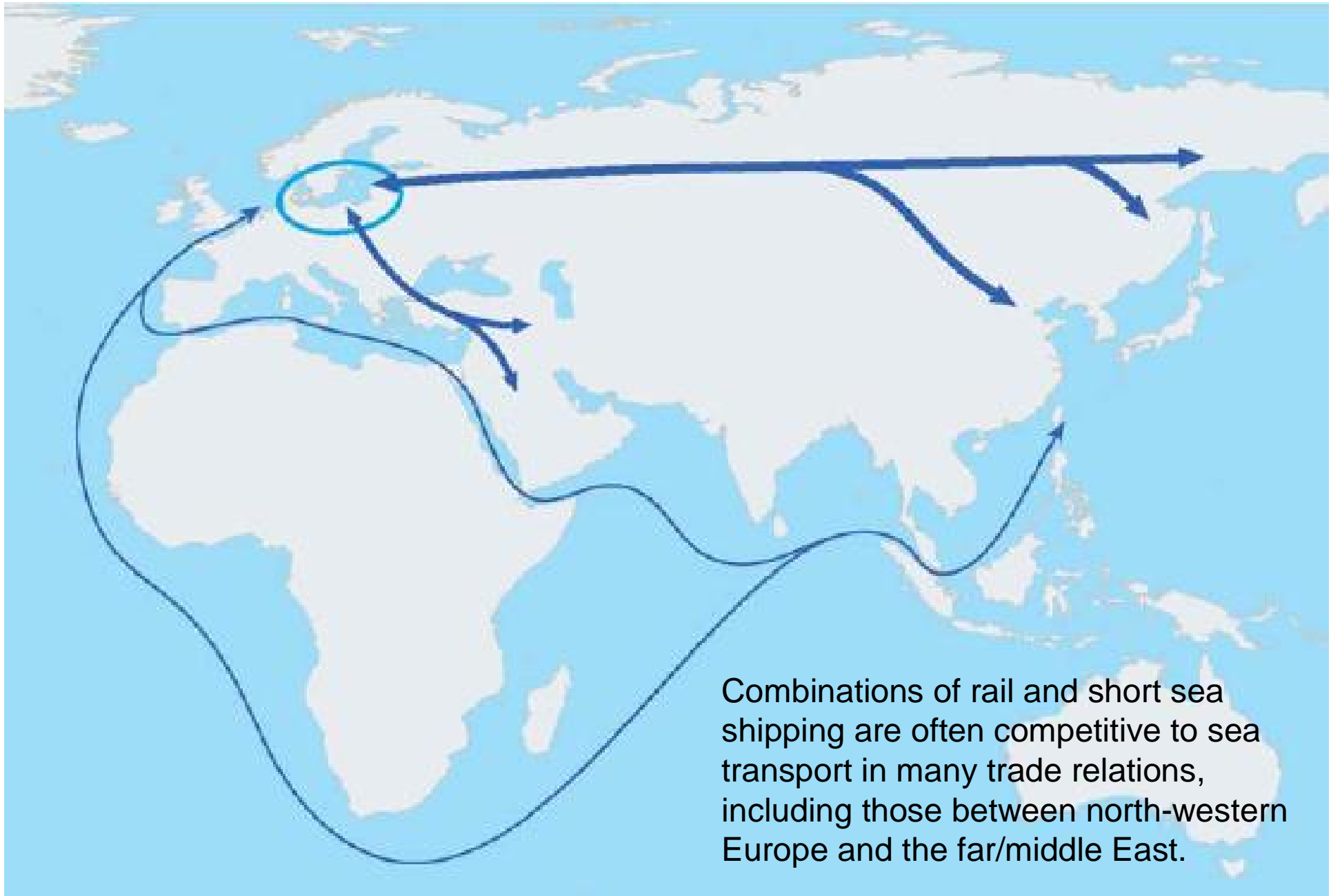
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The Baltic Sea is a global growth area



NETWORKS FOR PEACE AND DEVELOPMENT

Extension of the major trans-European
transport axes to the neighbouring countries and
regions

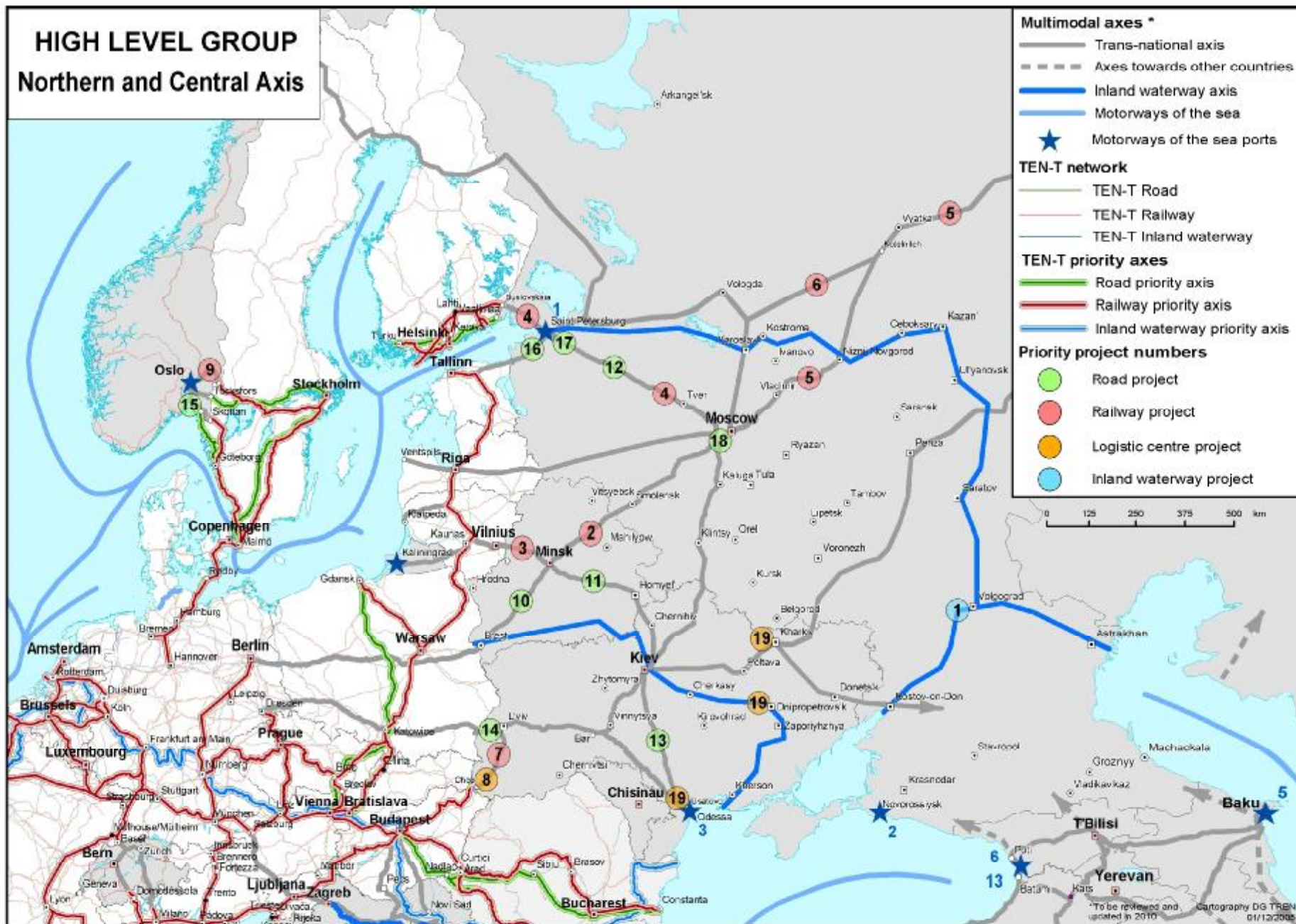


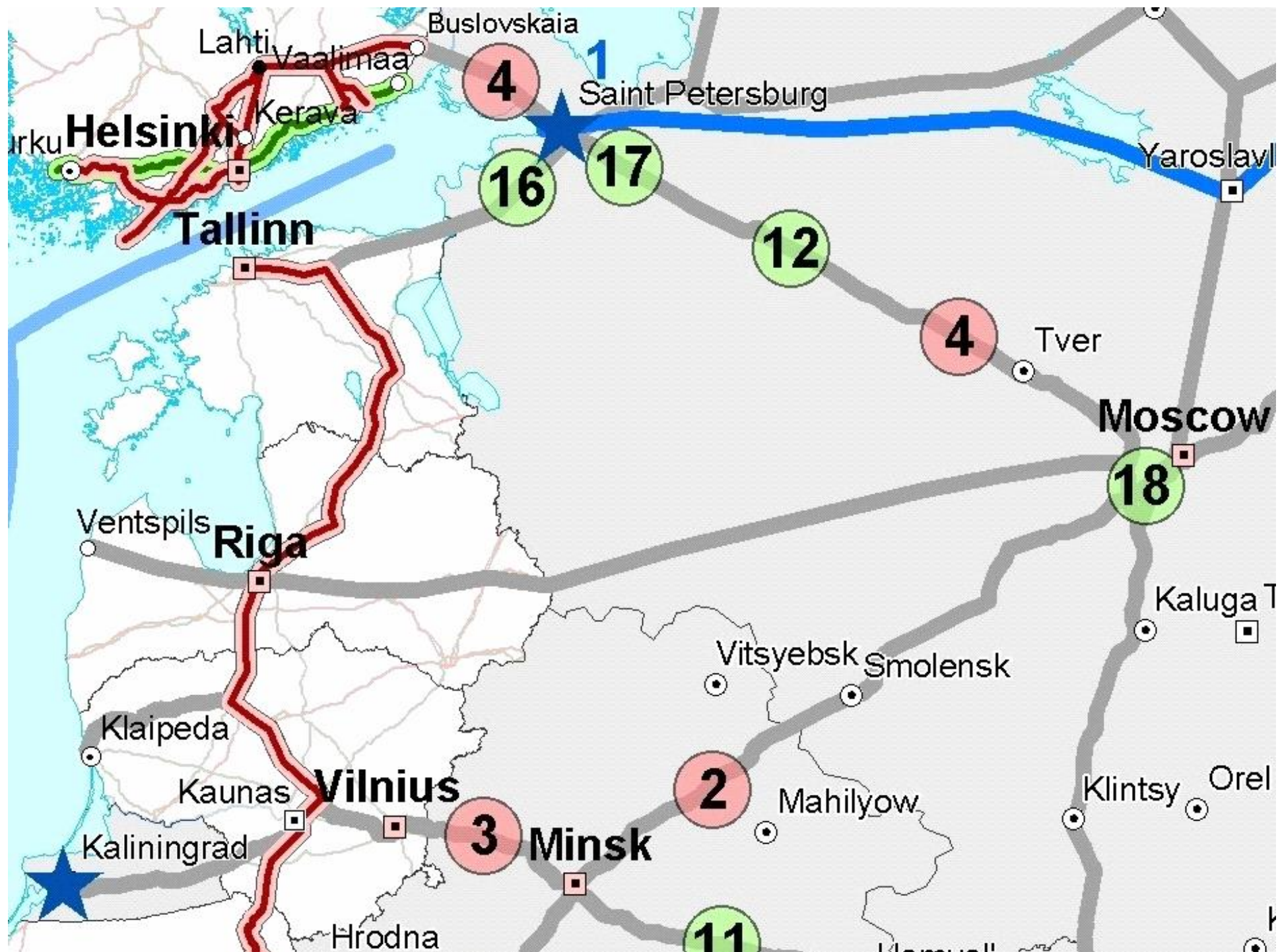
Report from the High Level Group chaired by Loyola de Palacio

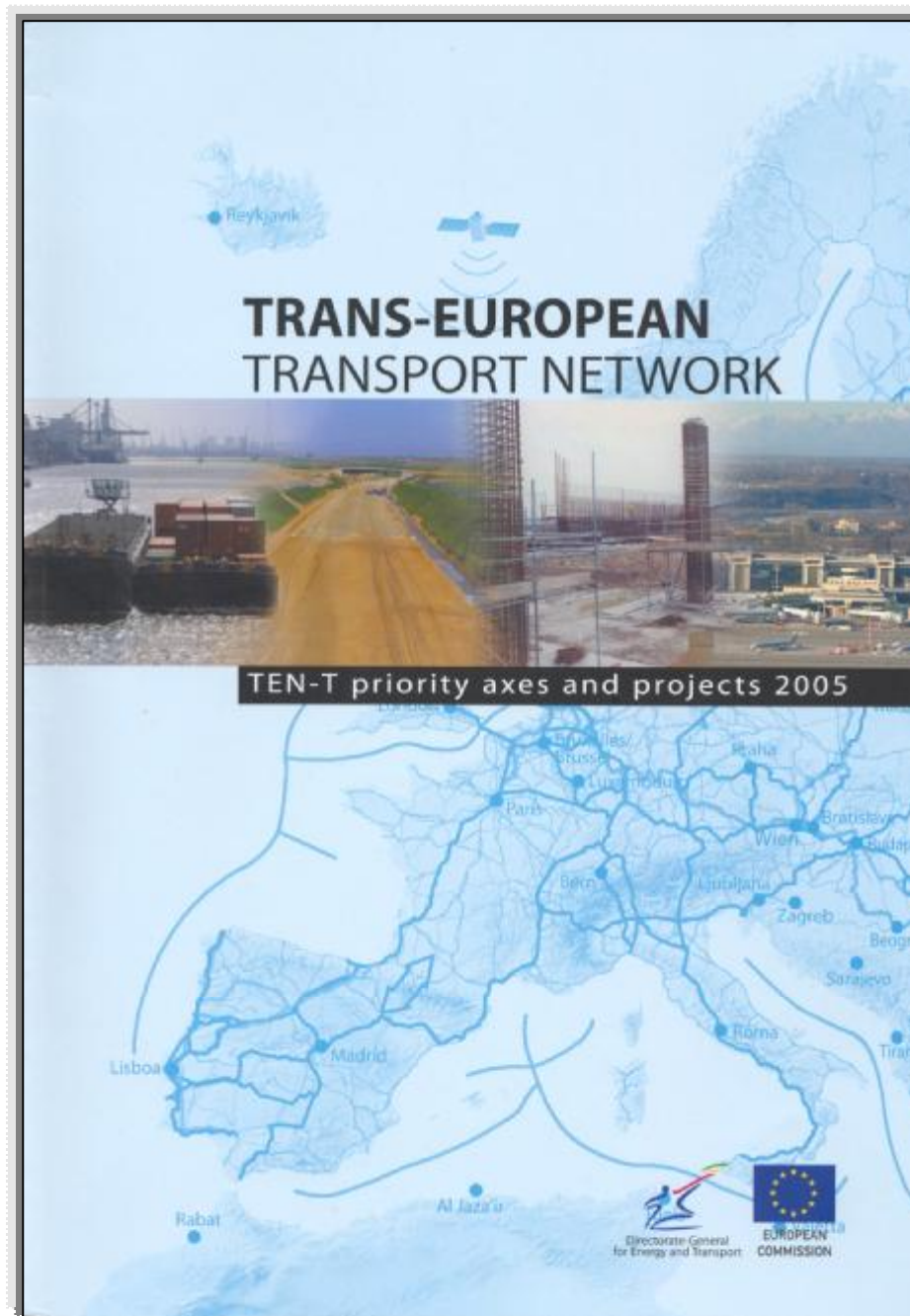
November 2005



European Commission

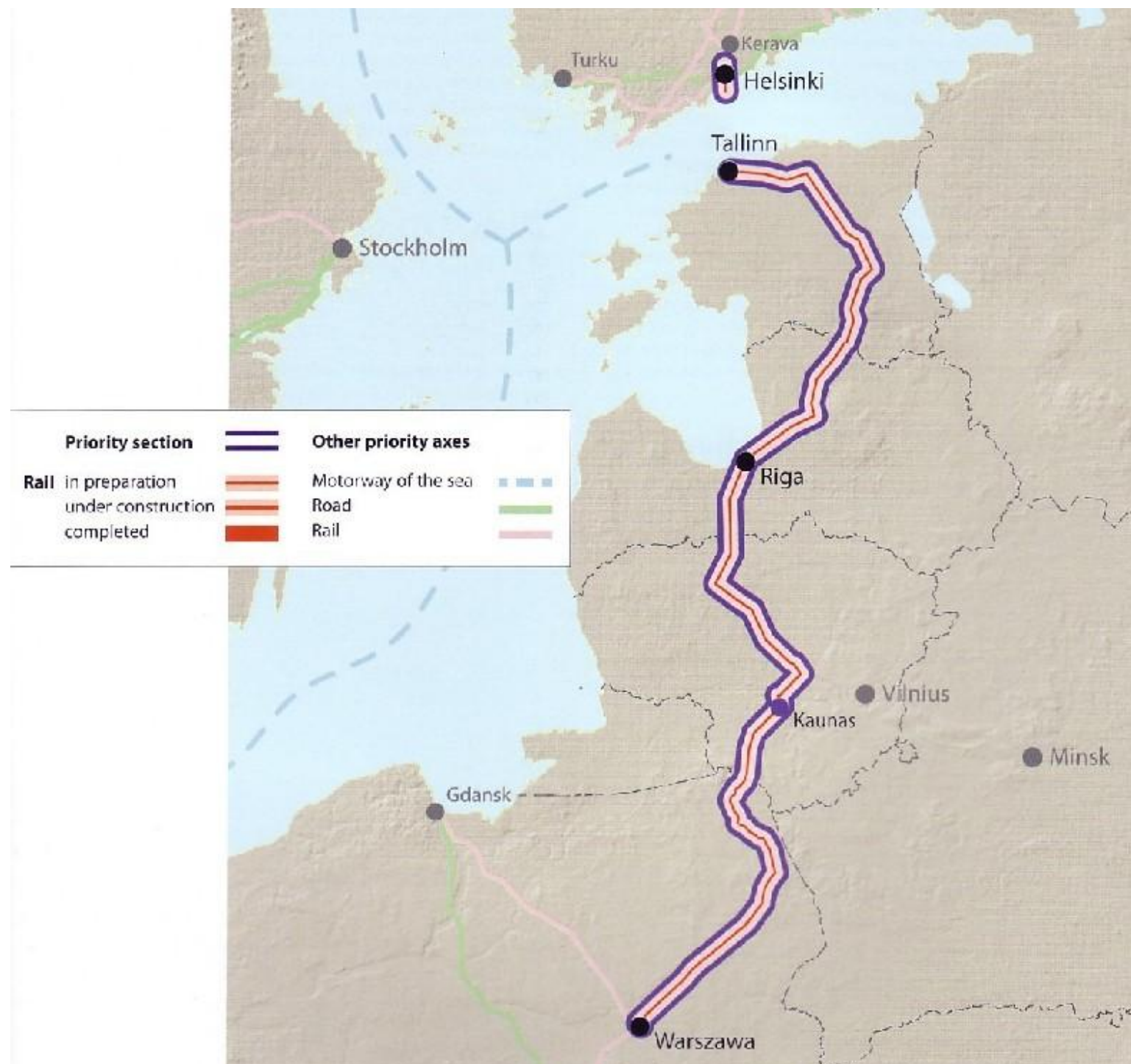


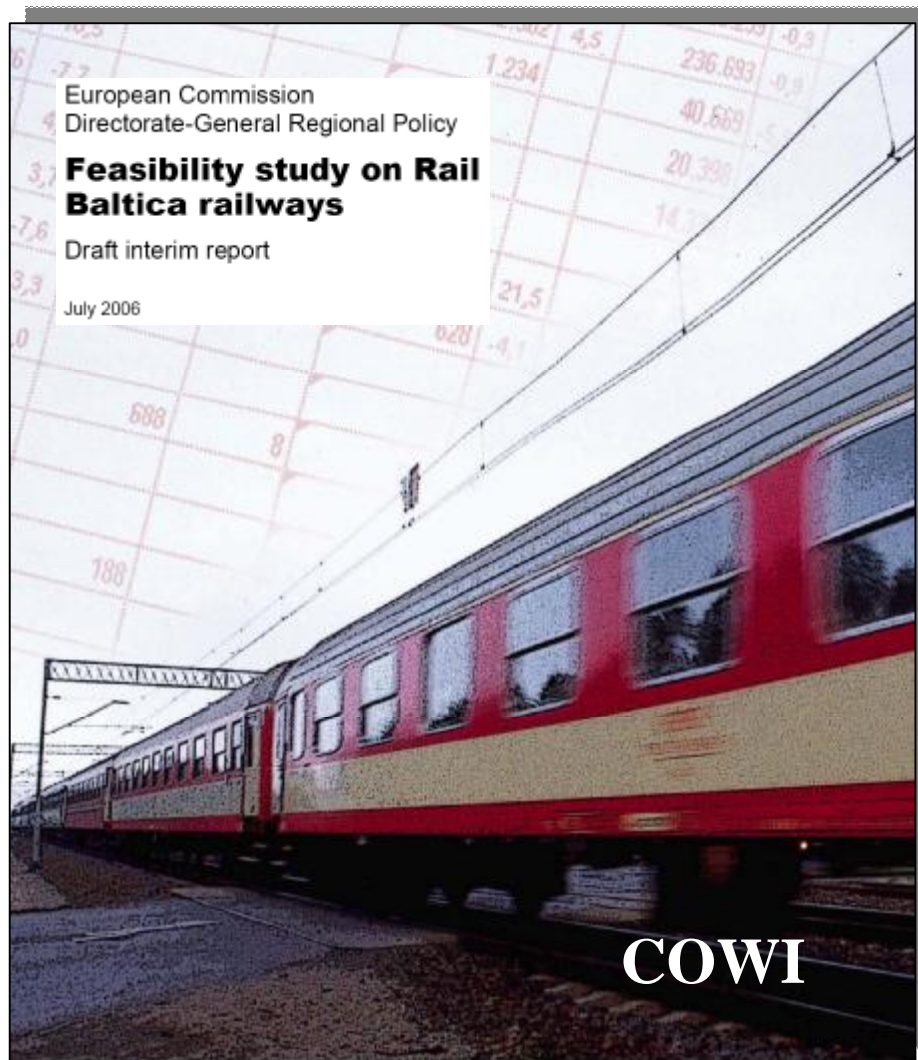




Baltic Sea motorway







| | Upgrade of existing line | New line |
|-------------------|--------------------------|------------|
| Russian standard | ●●●●● 120 km/h | — 160 km/h |
| | ●●●●● 160 km/h | |
| European standard | ●●●●● 120 km/h | — 200 km/h |
| | ●●●●● 160 km/h | |



Figure 1.1 Graphical presentation of Package 1



Figure 1.2 Graphical presentation of Package 2



Figure 1.3 Graphical presentation of Package 3





MINISTRY OF
ECONOMIC AFFAIRS AND
COMMUNICATIONS

RailBaltica - Alignment options from Tallinn to Riga (draft)



- Feasibility Study ongoing
- Interim Report - end of July (alignment possibilities)
- Final Report – December 2006
- Further detailed EIA and technical analyses; Pre-design; Detailed design

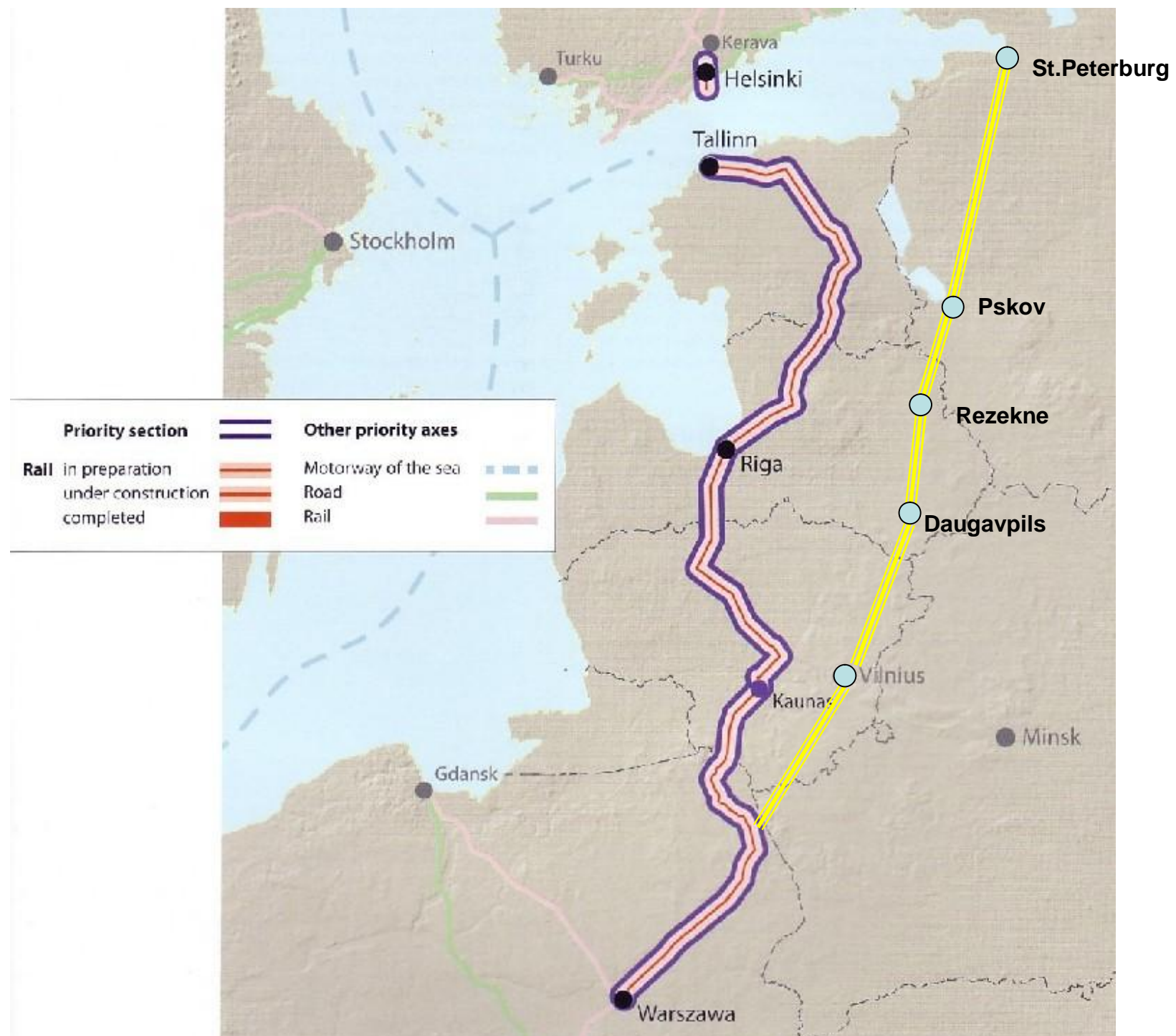
Developing plan of the Russian Harbours - 2010





St. Petersburg dimension





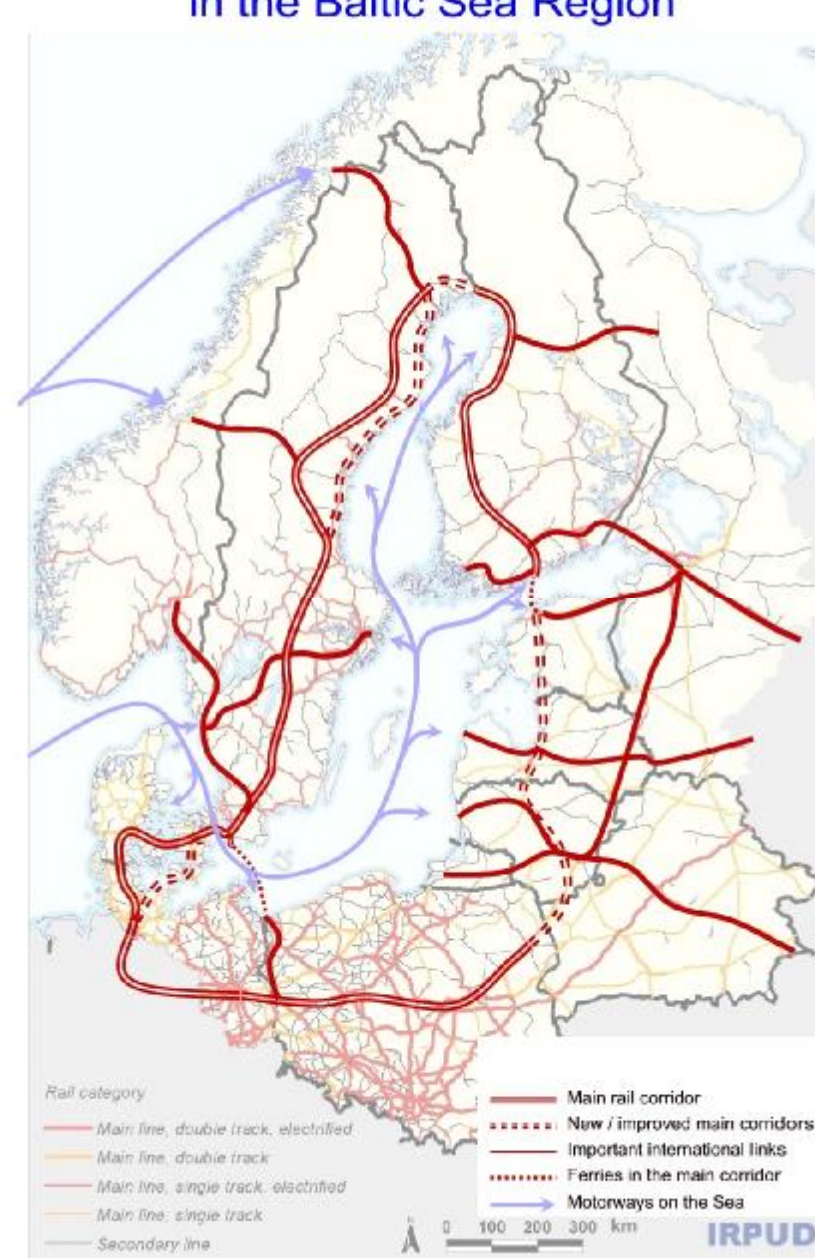
TRANSPORT CHALLENGES IN THE BALTIC SEA AREA
REPORT BY THE CPMR BALTIC SEA COMMISSION WORK GROUP TRANSPORT

TRANSPORT CHALLENGES IN THE BALTIC SEA AREA

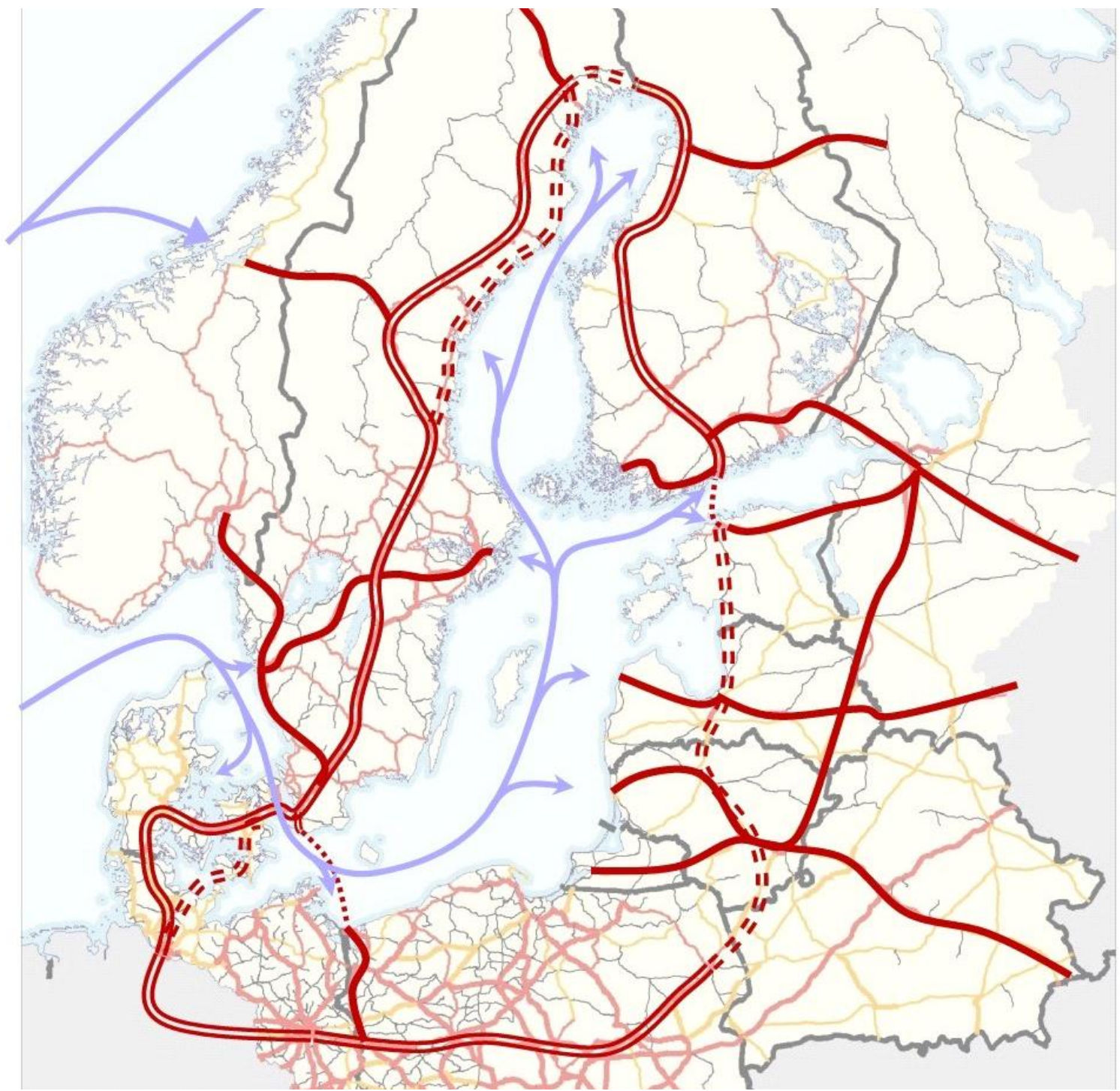
REPORT BY THE CPMR BALTIC SEA COMMISSION
WORK GROUP TRANSPORT



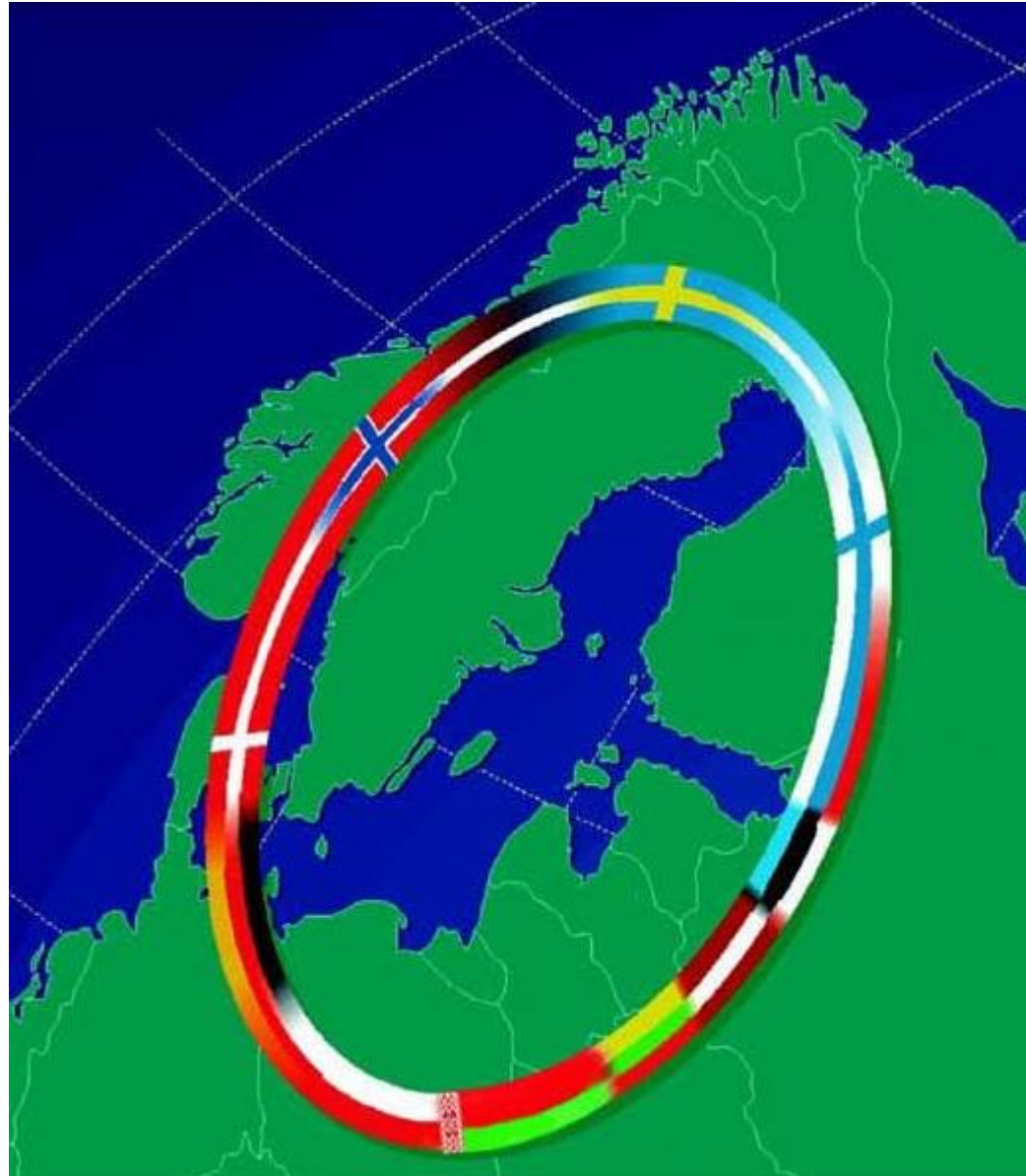
Current and future rail network in the Baltic Sea Region

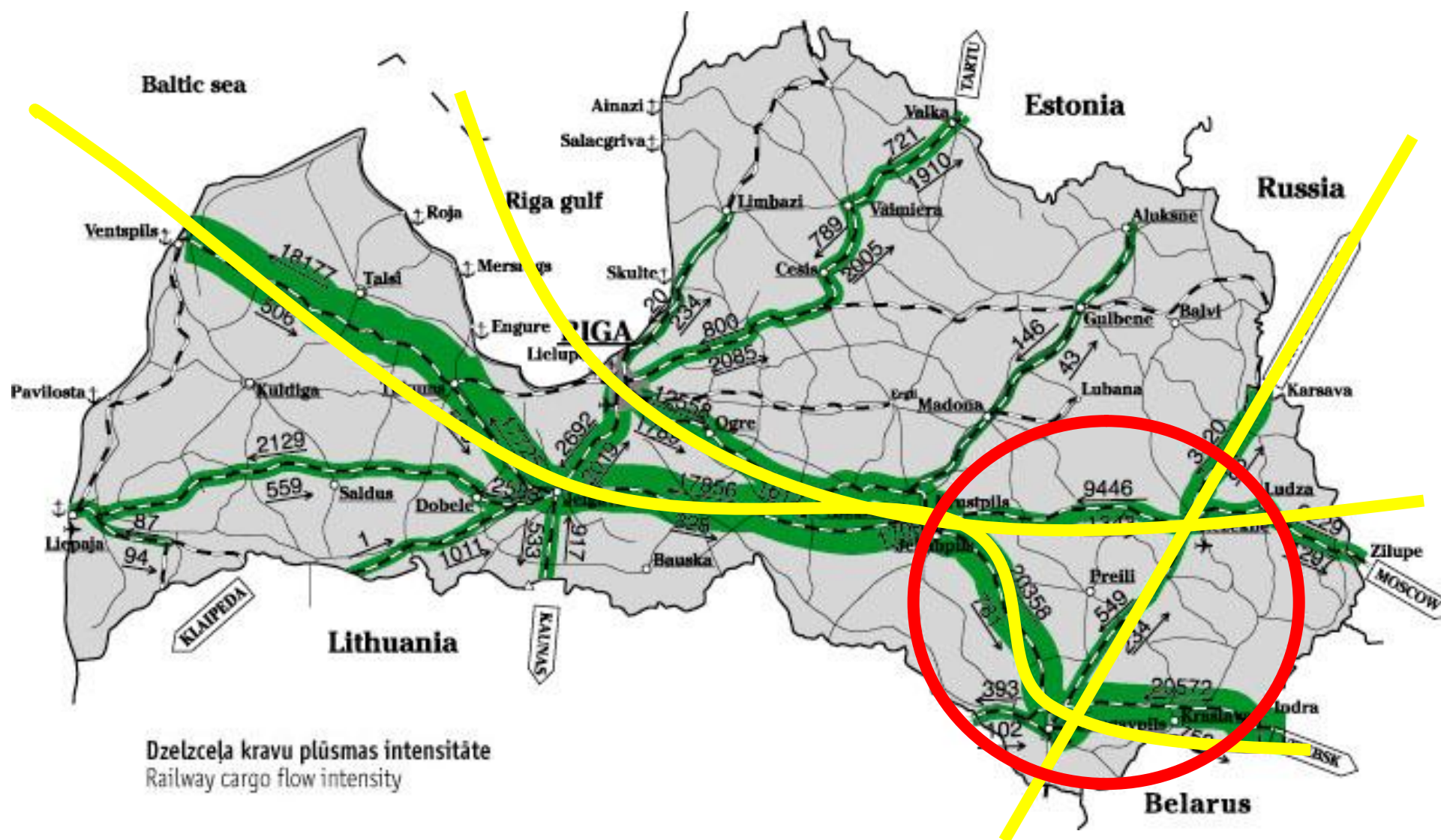


Source: IRPUD (2000)

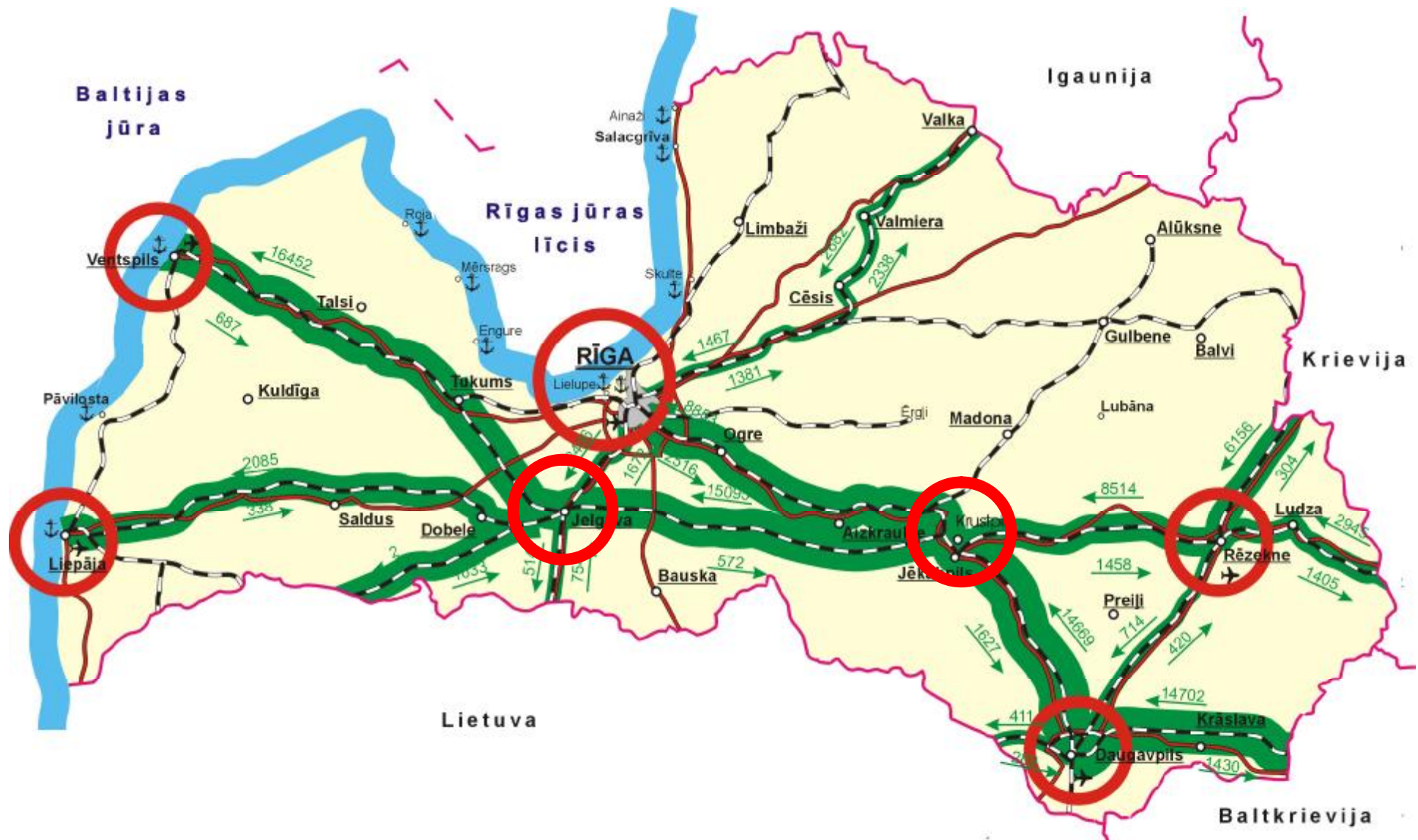


The Baltic Ring





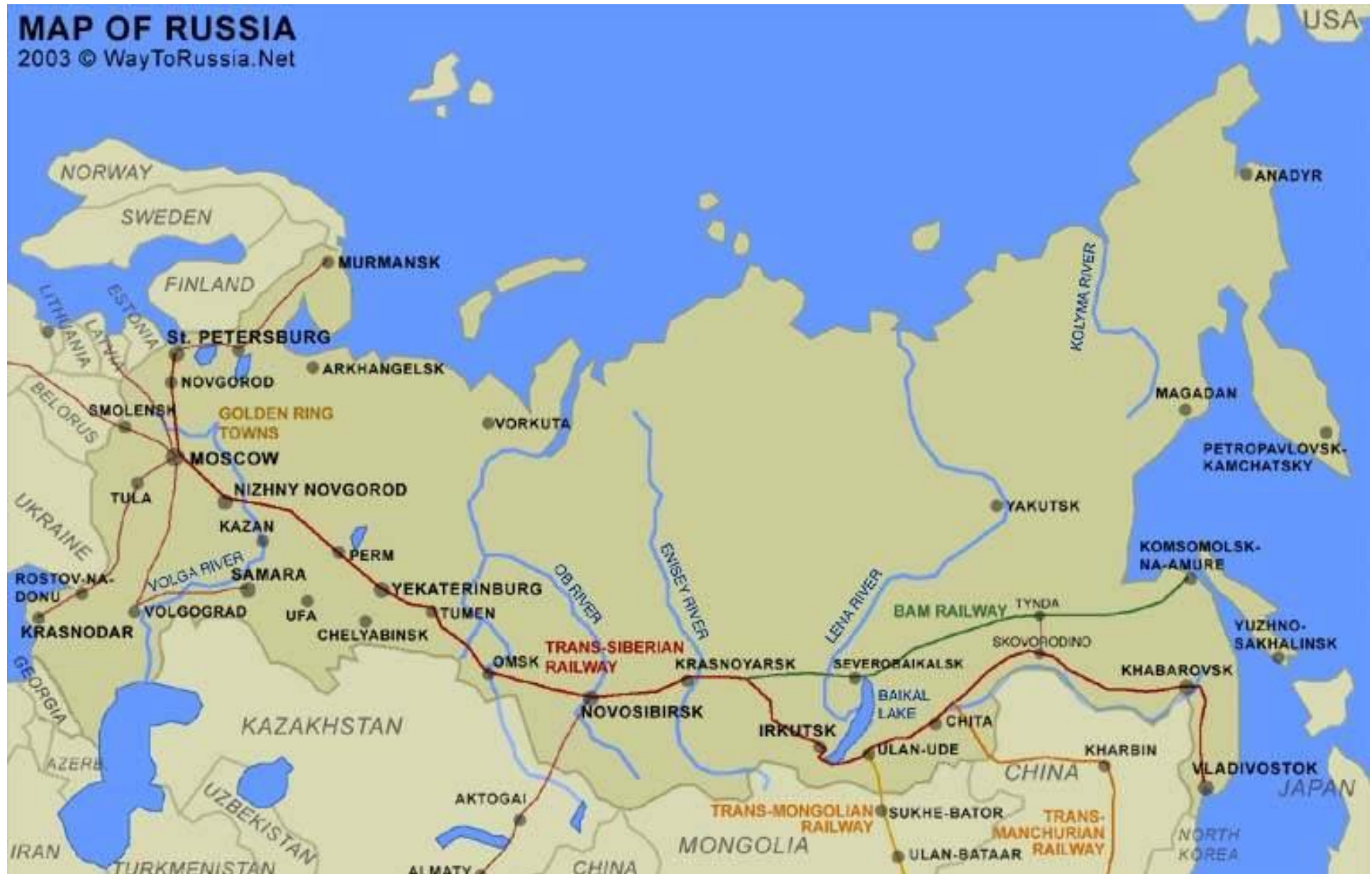
Latvia possibilities for providing logistics services and distribution warehouses



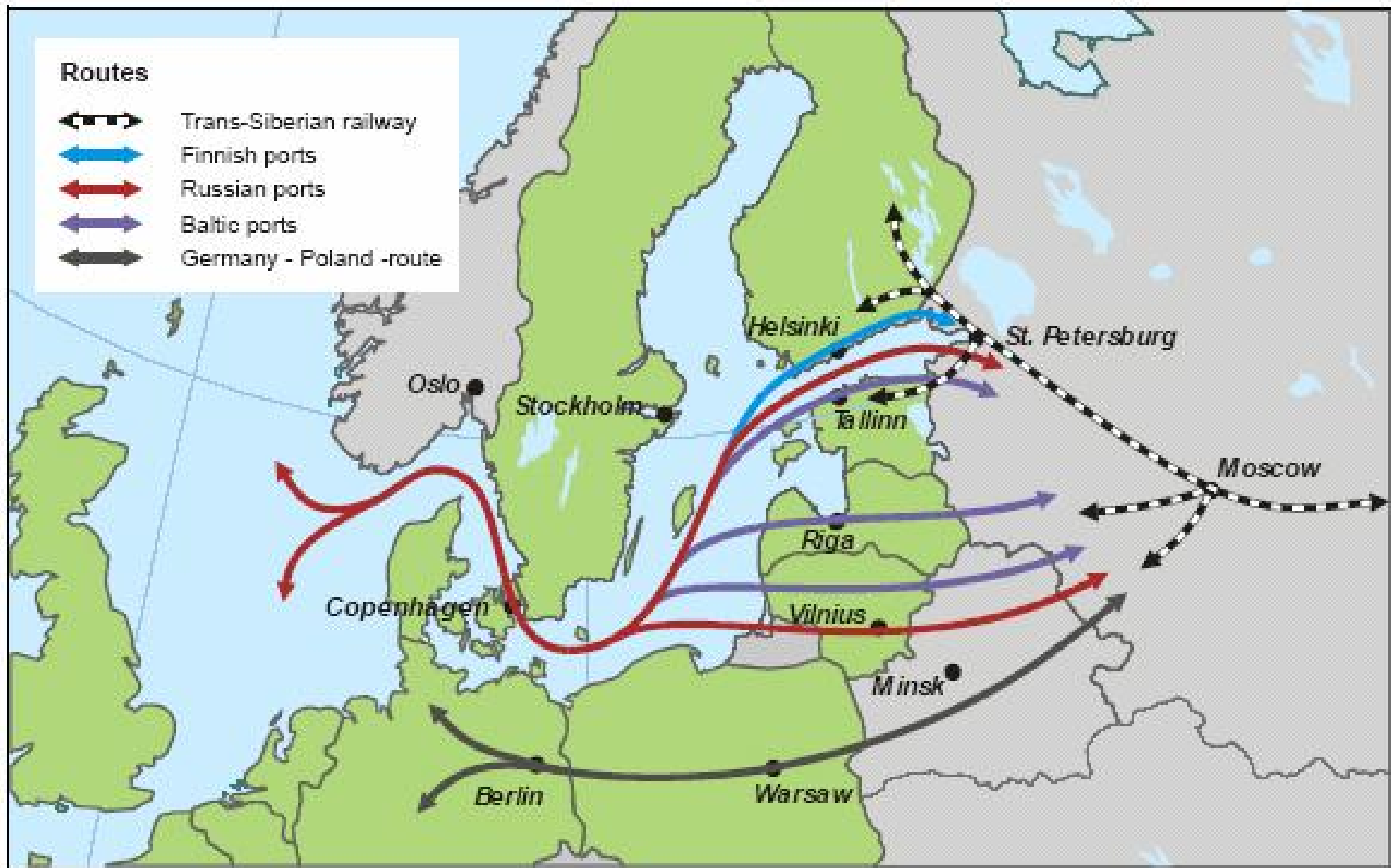
Comparison of major EU-Asia traffic routes



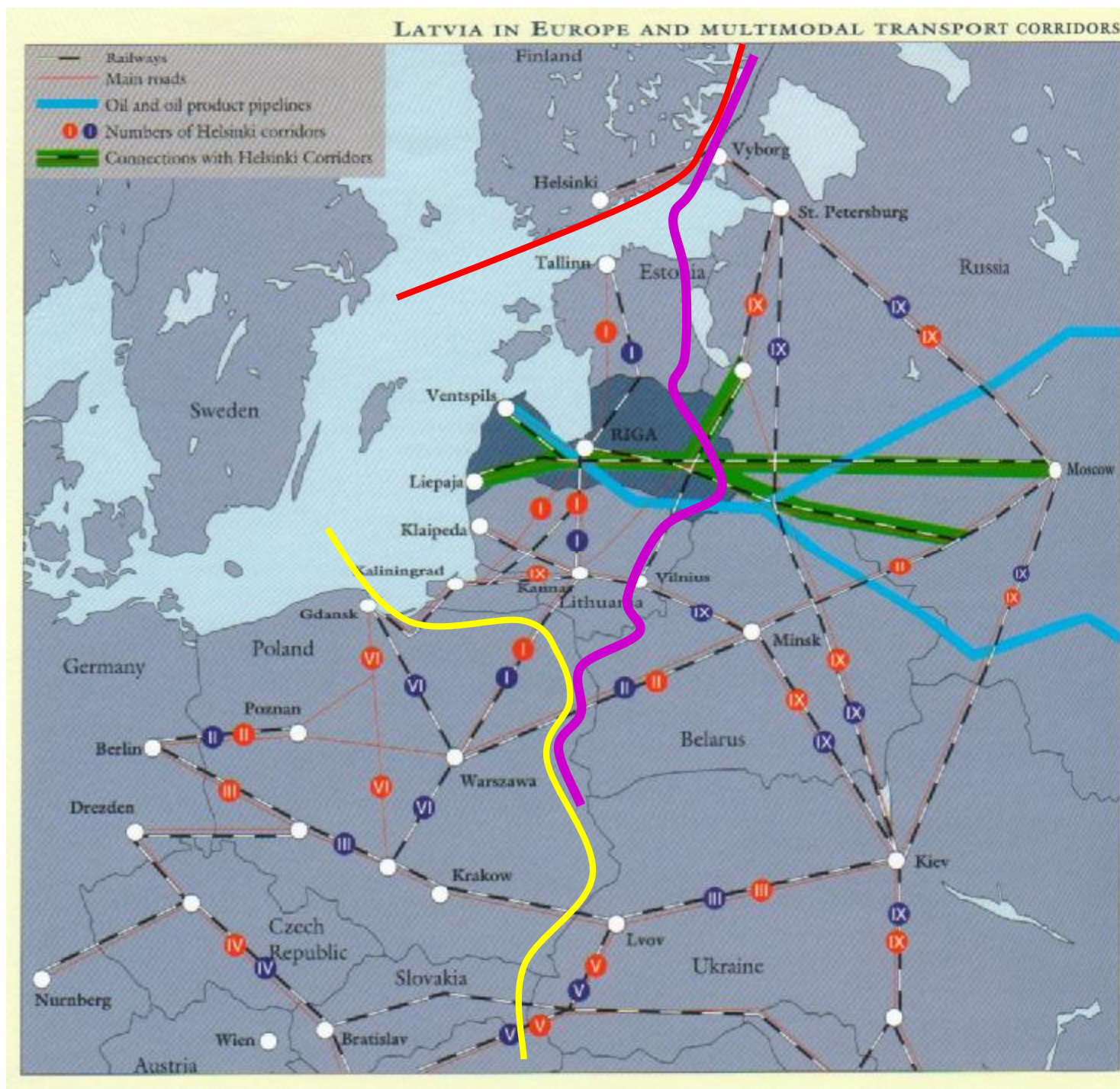
Trans-Siberian Railway



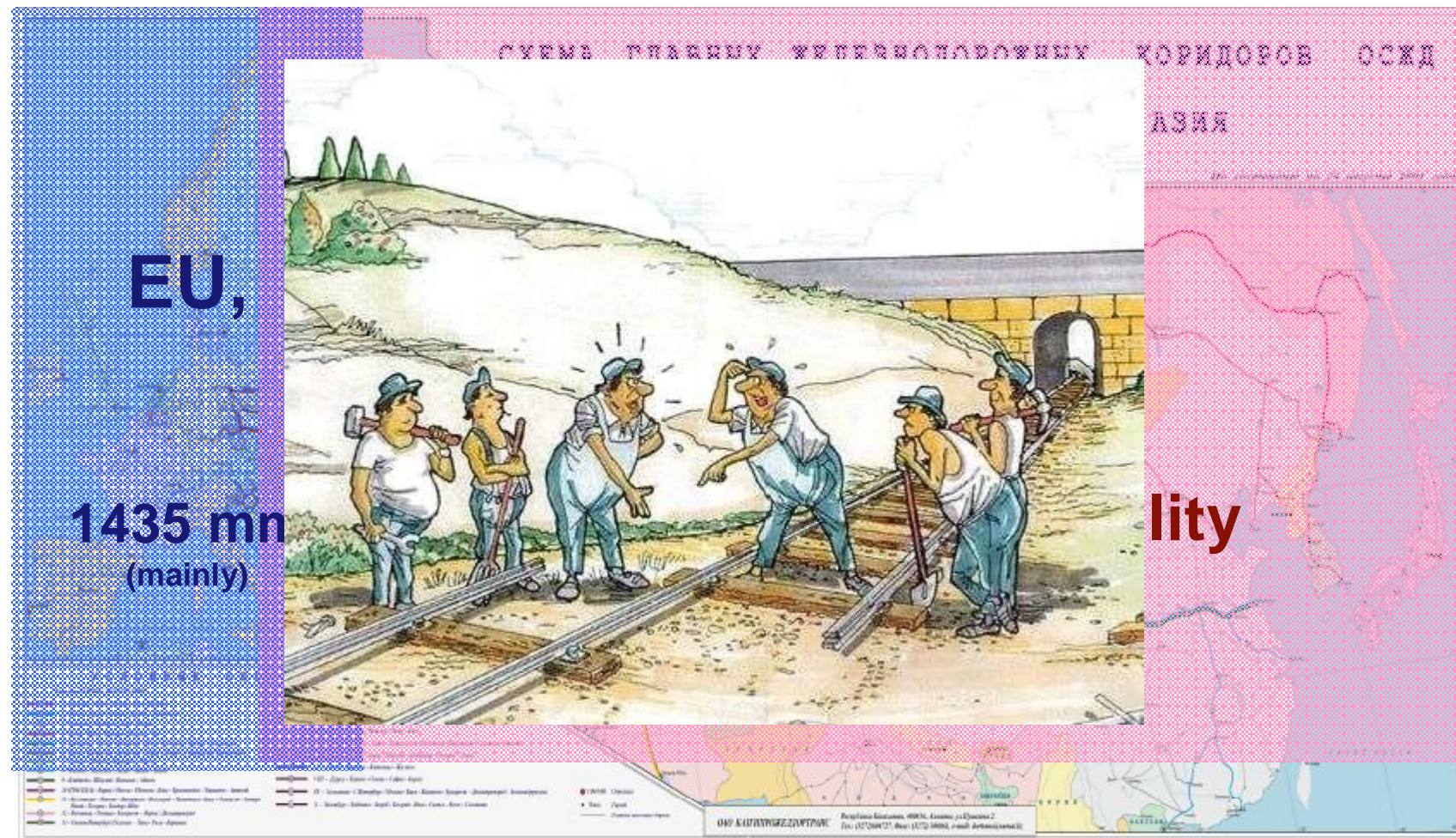
Main transport routes between EU and Russia



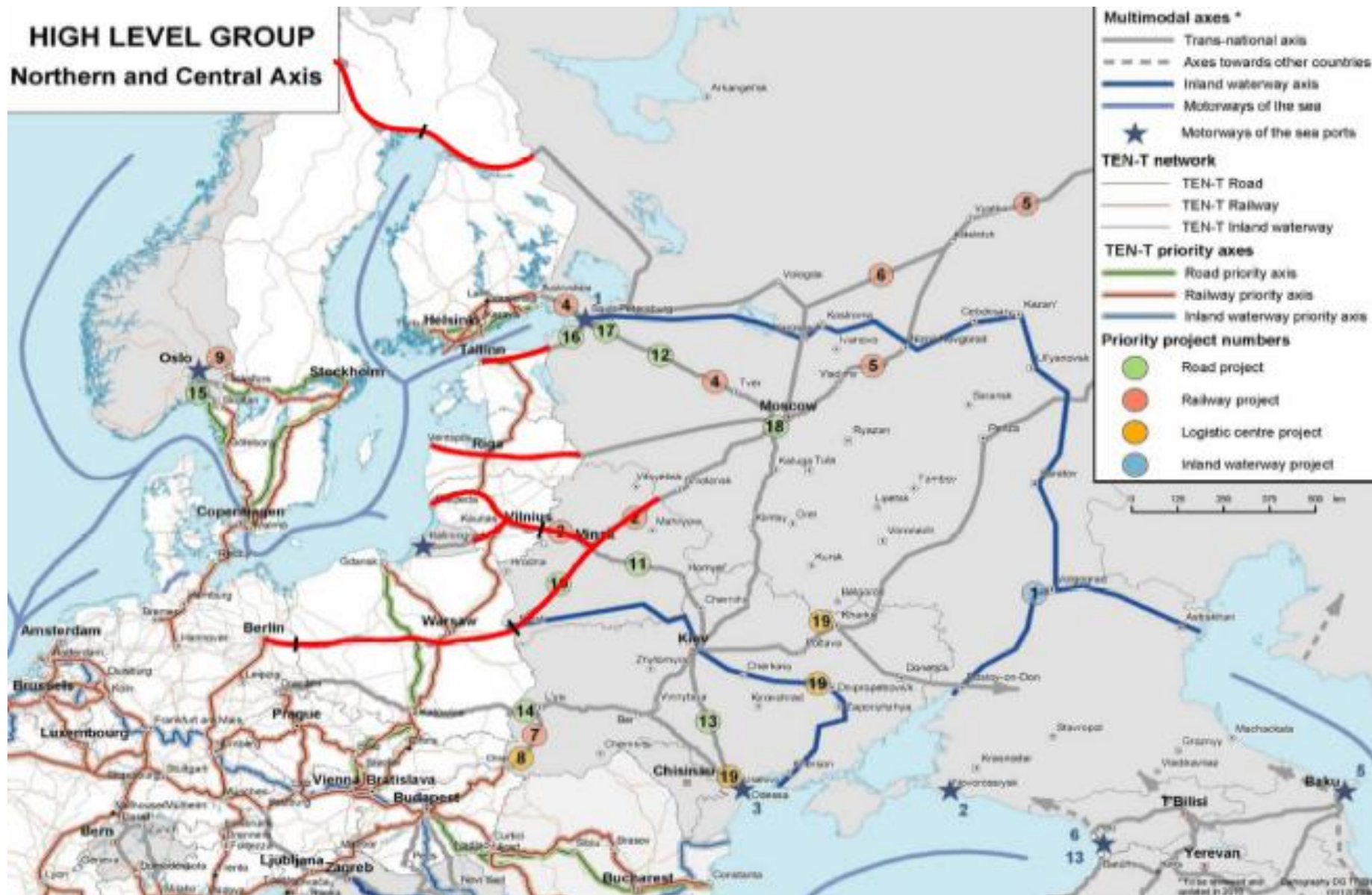
Source: Transport connections between EU and Russia. Ministry of Transport and Communications Finland, Helsinki 2005



Latvia – on the border of two systems

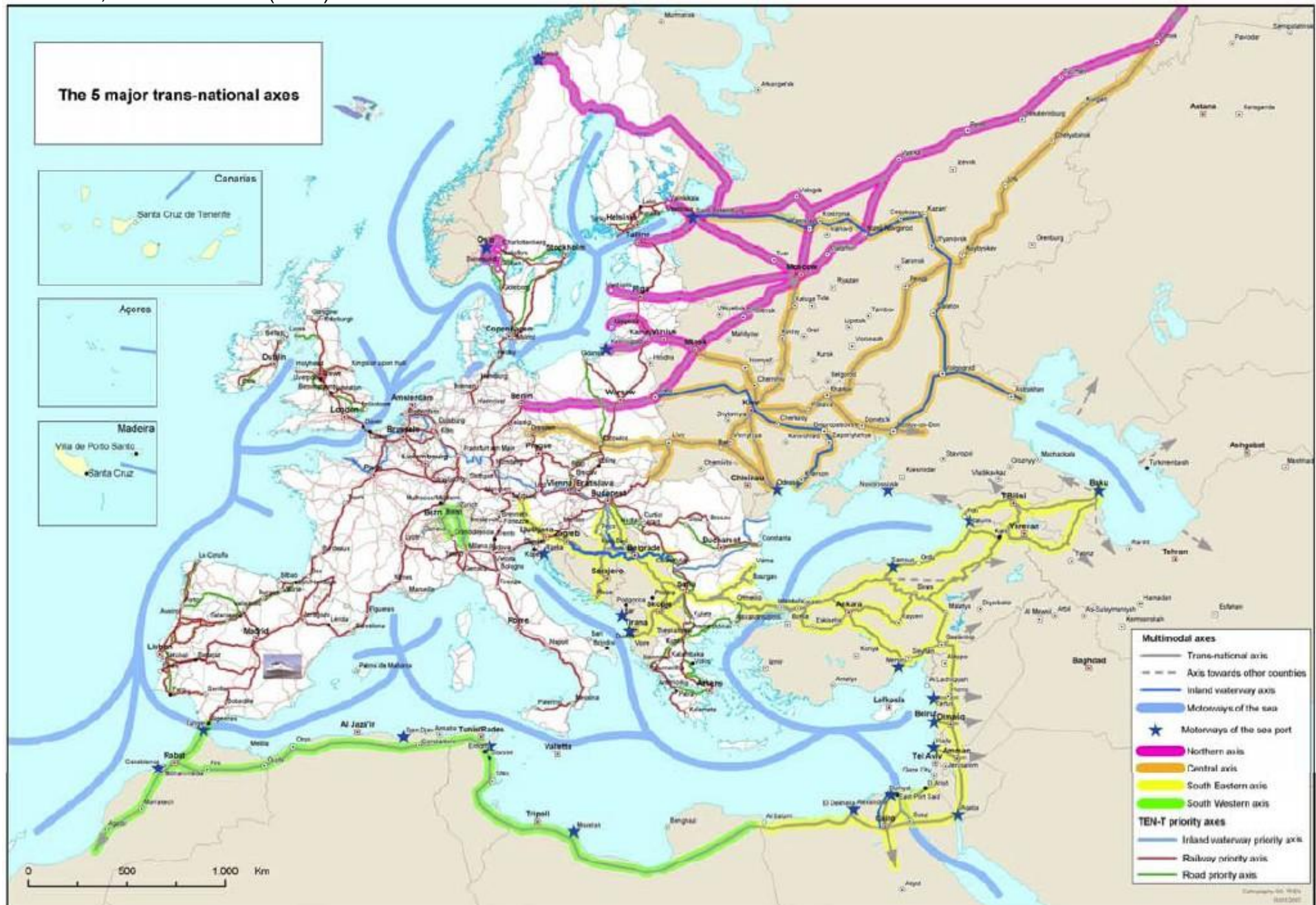


HIGH LEVEL GROUP Northern and Central Axis



Extension of the major trans-European transport axes to the neighbouring countries

Brussels, 31.1.2007 COM(2007) 32 final



**Rail and road
capacity in Sweden**

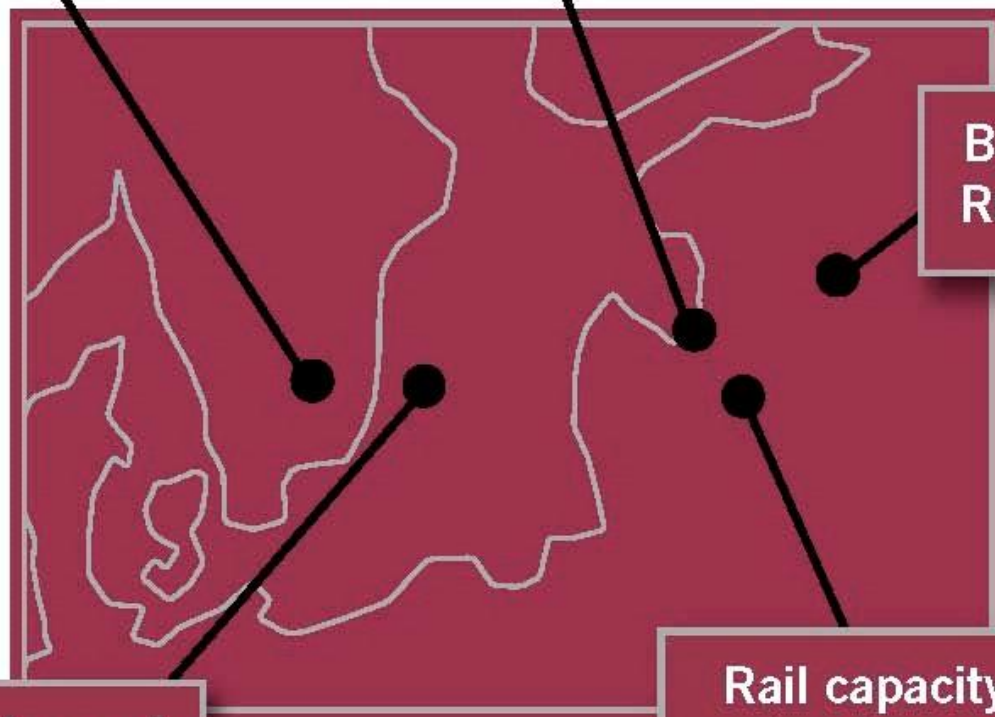
**Riga traffic
congestion**

**Bottlenecks in the
Baltic Tangent area**

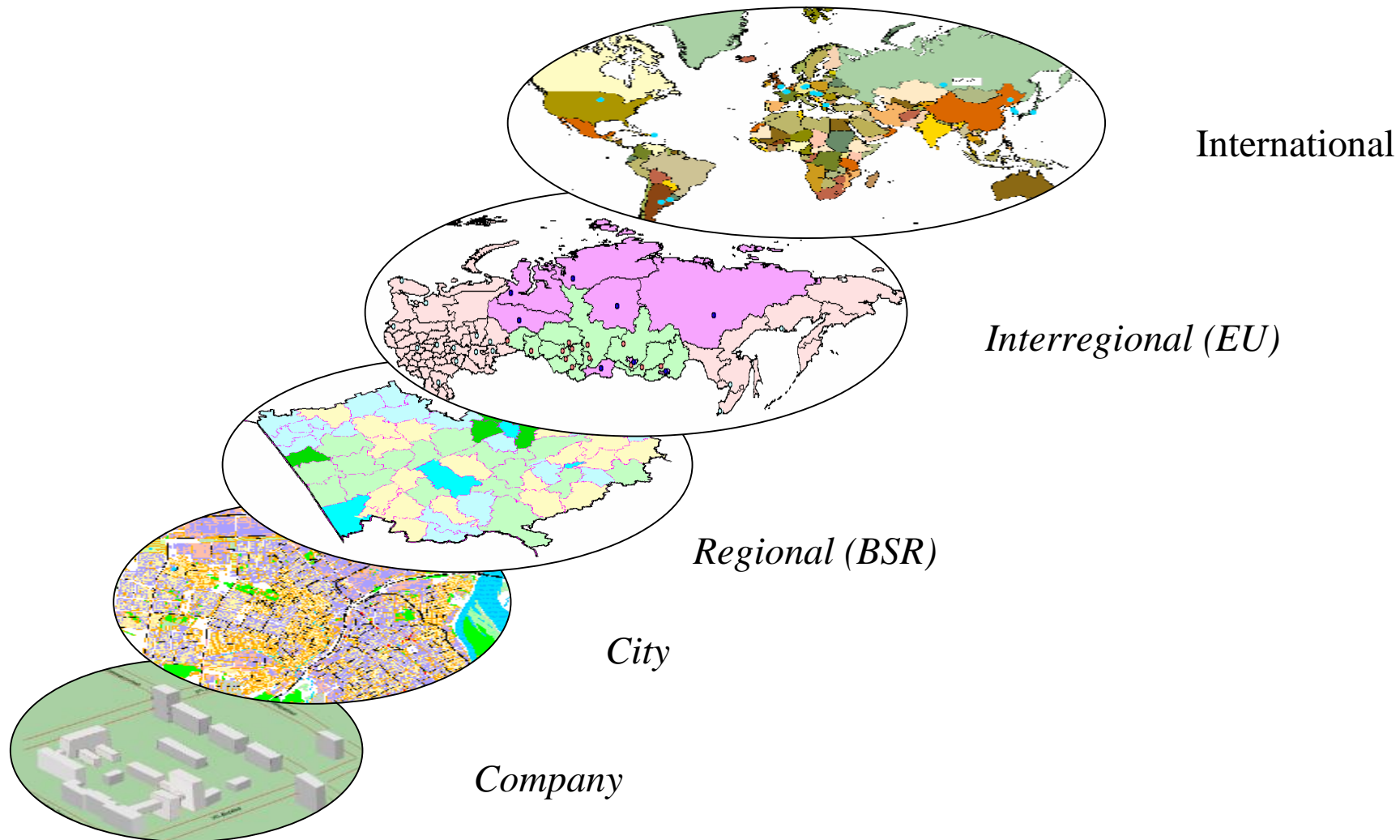
**Border crossing to
Russia and far east**

**Rail capacity in Estonia,
Latvia and Lithuania**

**Ferry crossing and
port accessibility**



Levels of Logistics and Supply Chain Management

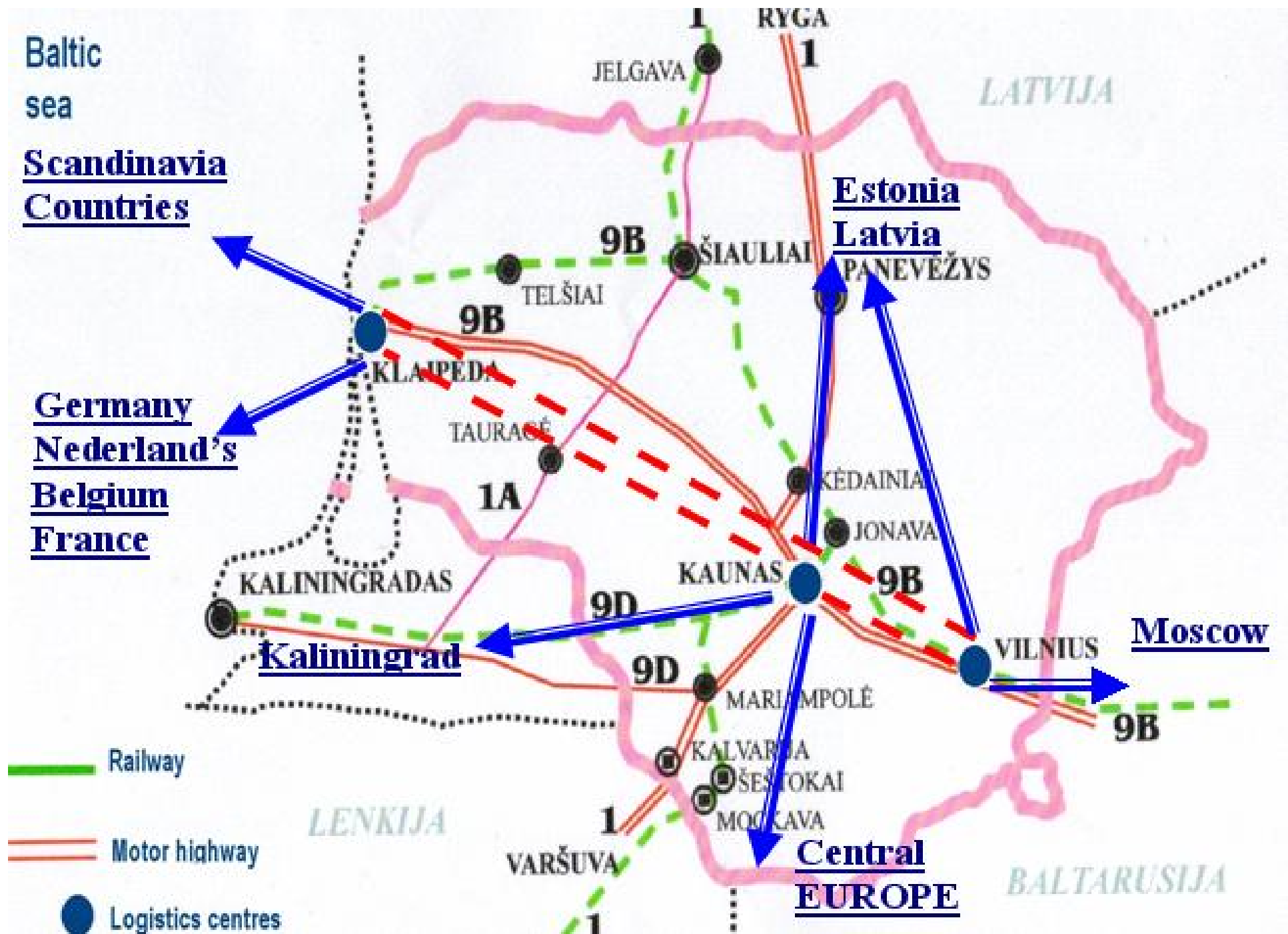




INTEGRATING LOGISTICS CENTRE NETWORKS IN THE BALTIC SEA REGION

InLoC creates better conditions for logistics operations in the Baltic Sea region by enhancing networking between logistics centres and their interest groups

- WP 1: Integrating **Networks** between Ports, Logistics Centres and Other Operators
- WP 2: **Spatial Planning** Supporting the Development of Logistics Centres
- WP 3: Integration of **ICT**-based Logistics and Transport Networks
- WP 4: Logistics **Education** and Project Dissemination







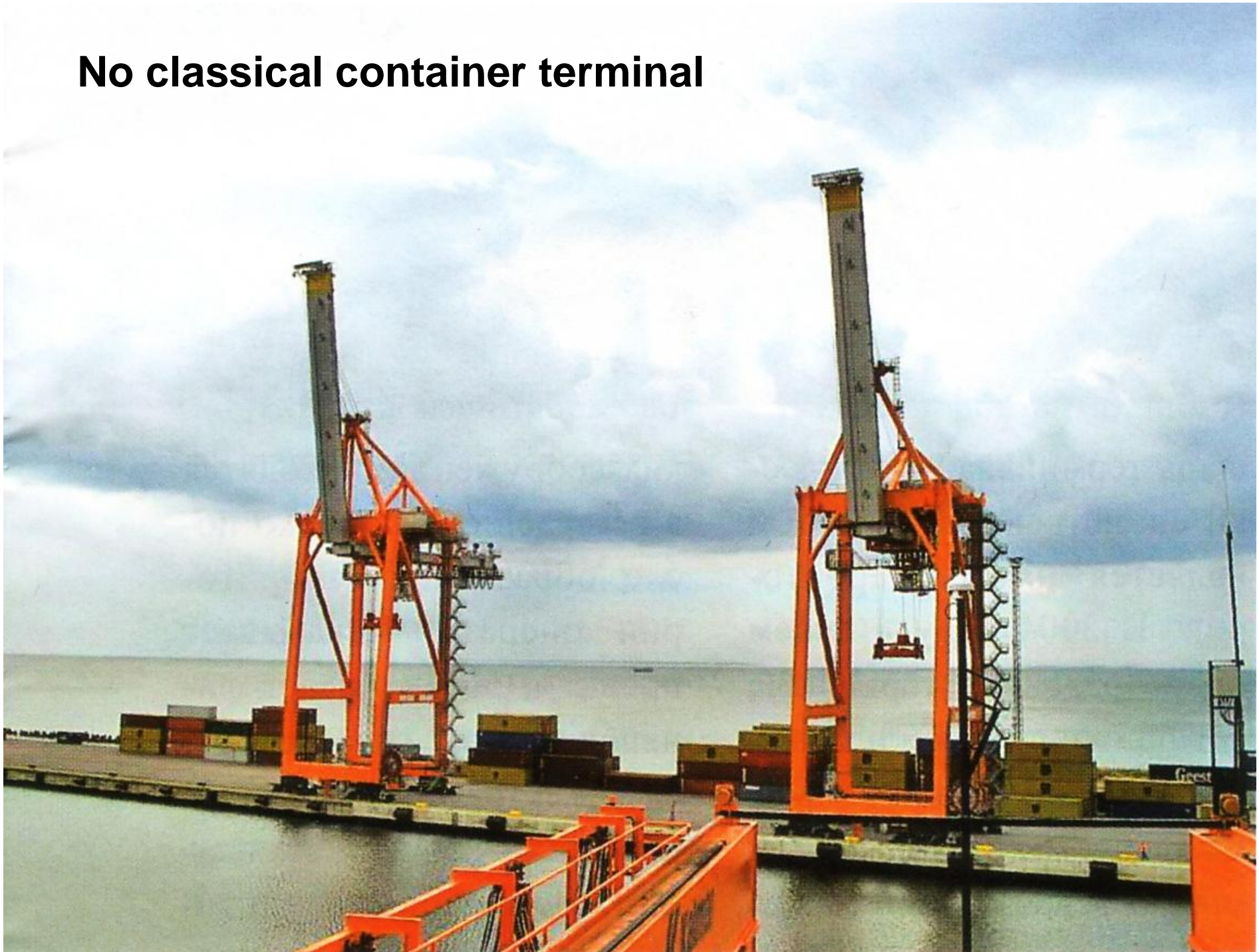
Shuttle carrier



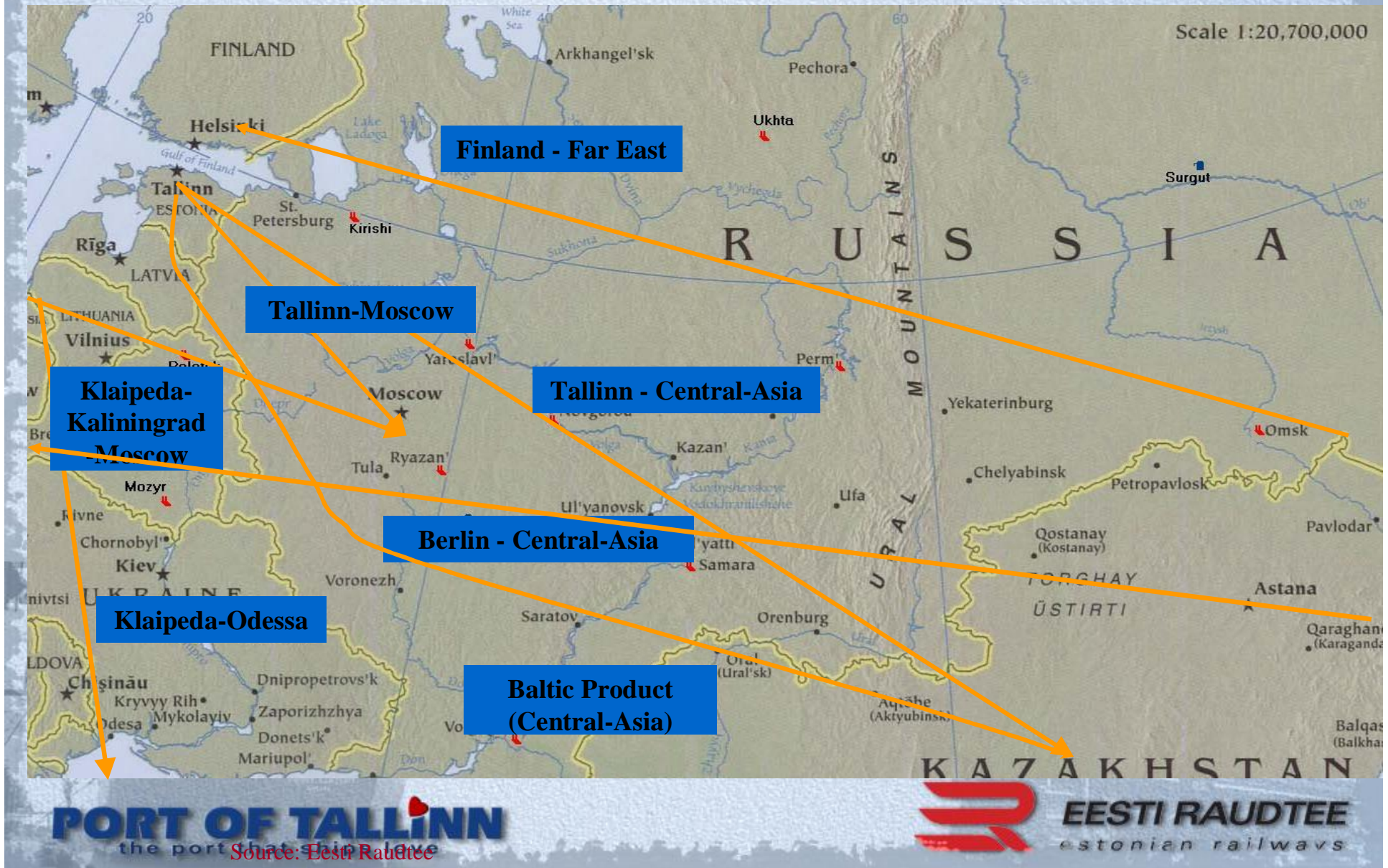
RTG



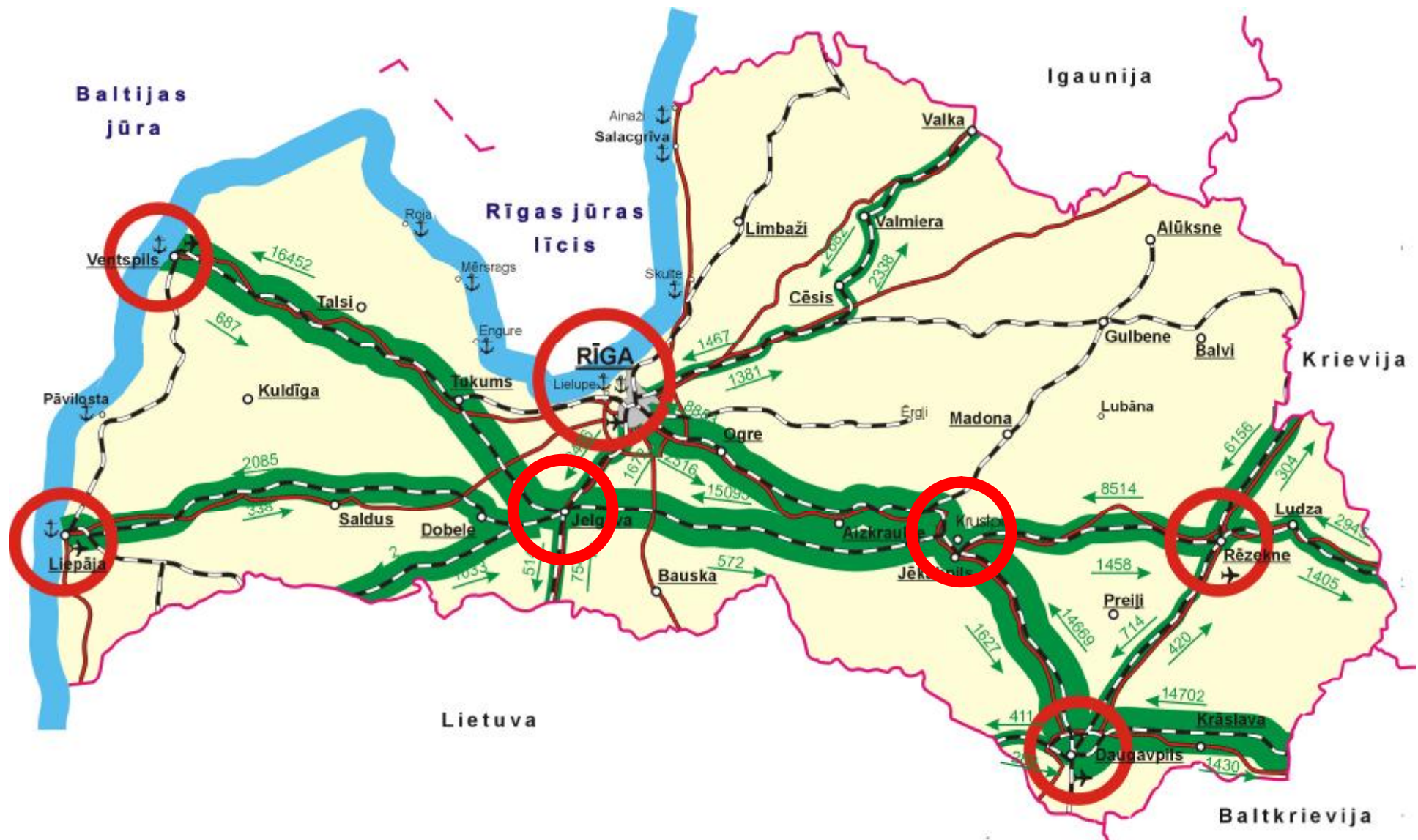
No classical container terminal

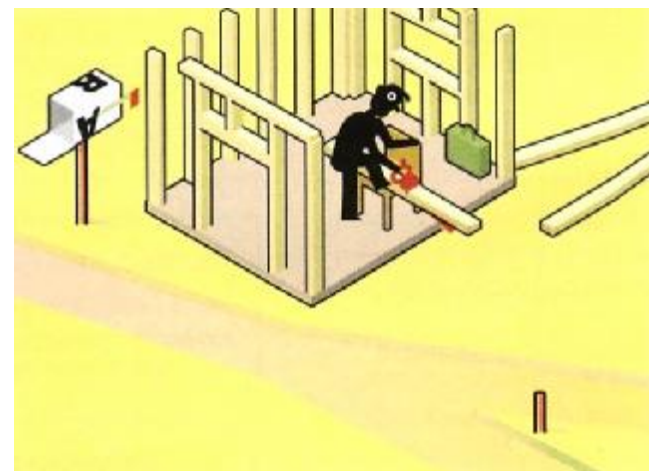
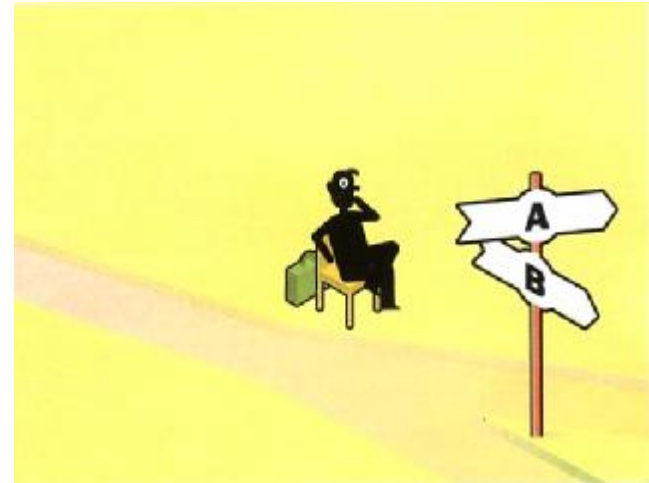
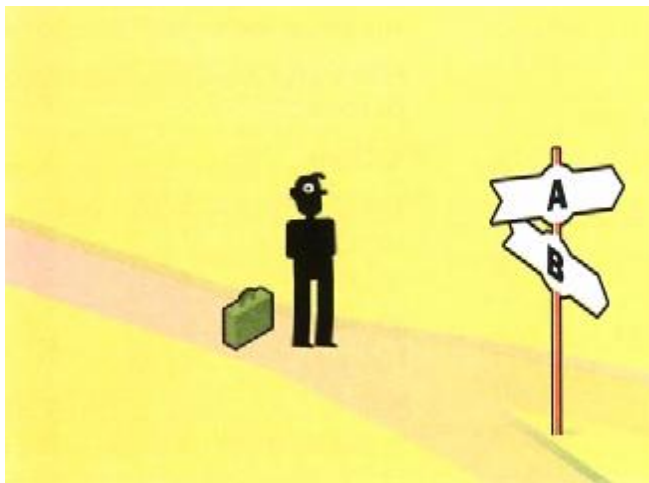
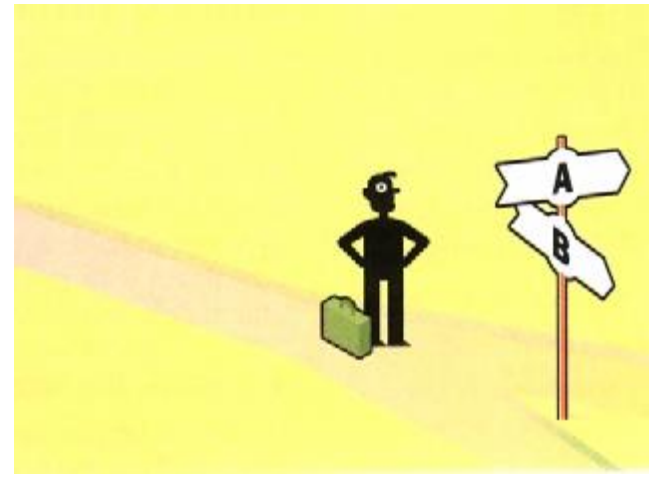
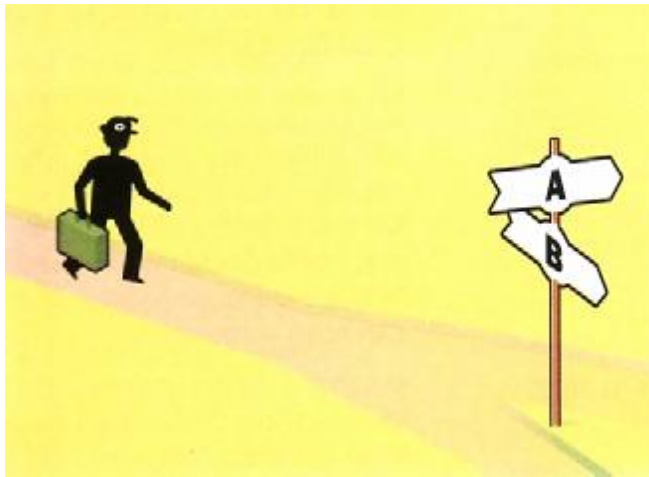


Major container directions

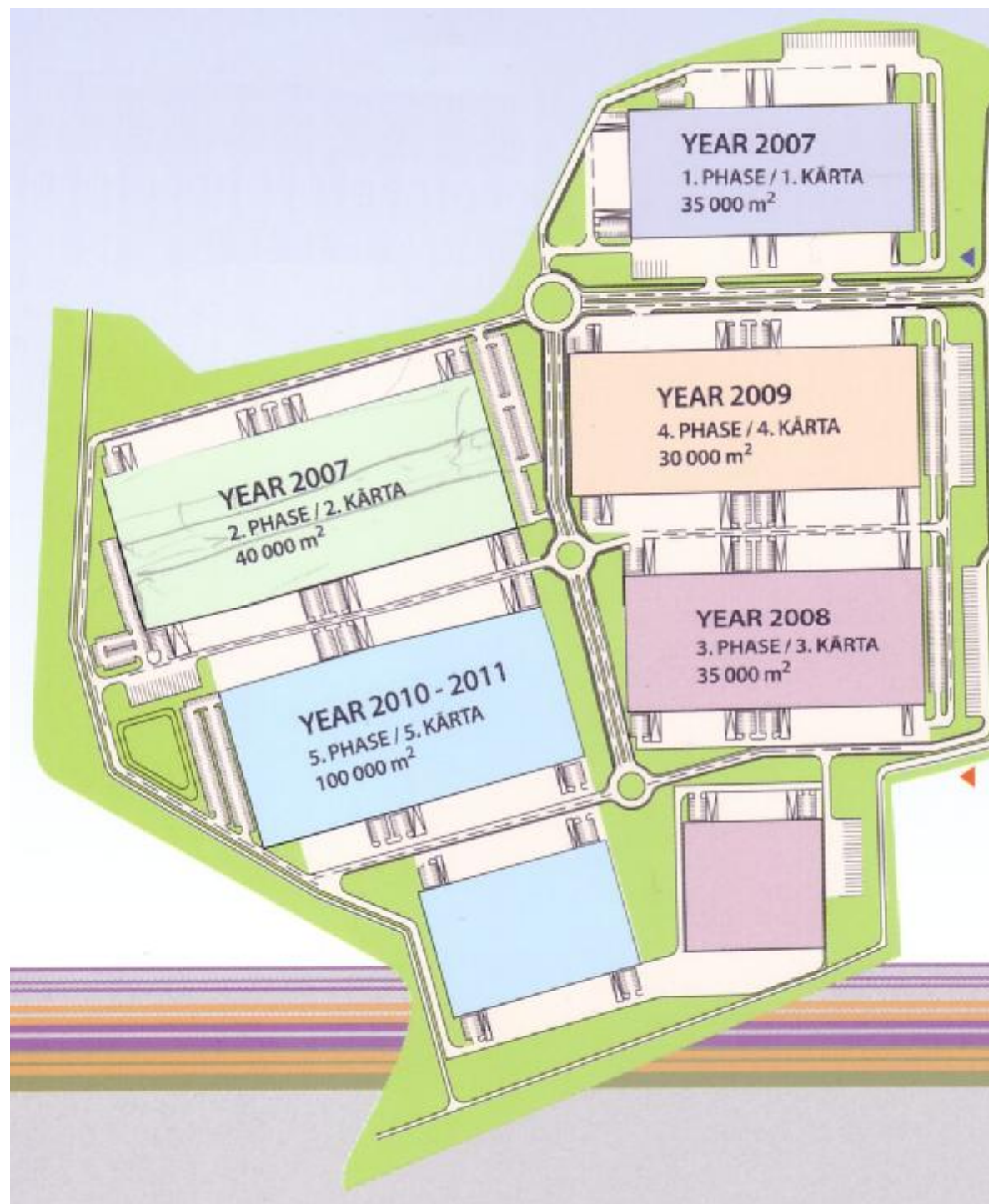


Latvia possibilities for providing logistics services and distribution warehouses











Baltic Countries:

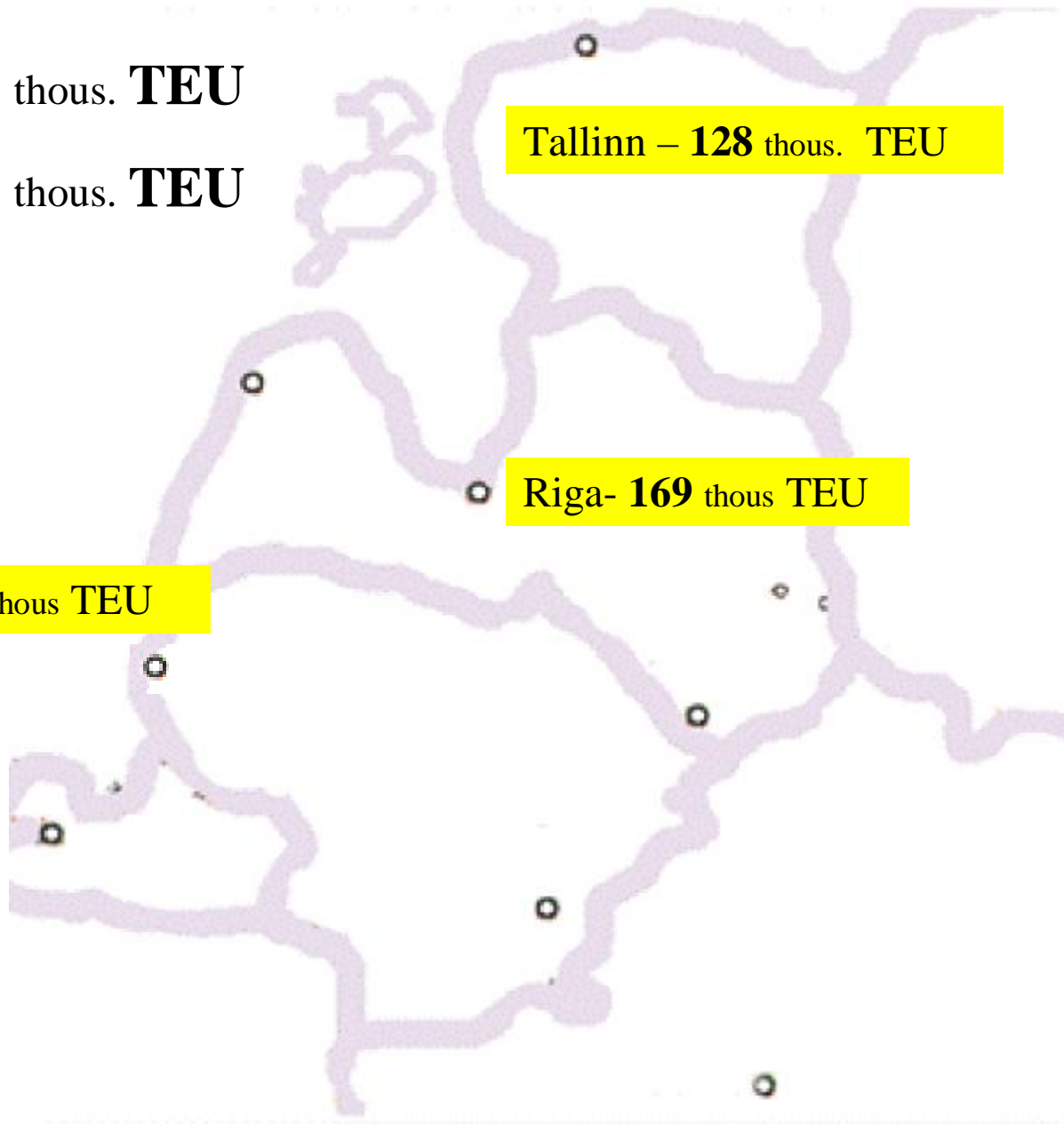
1996 – 212 thous. TEU

2005 – 515 thous. TEU

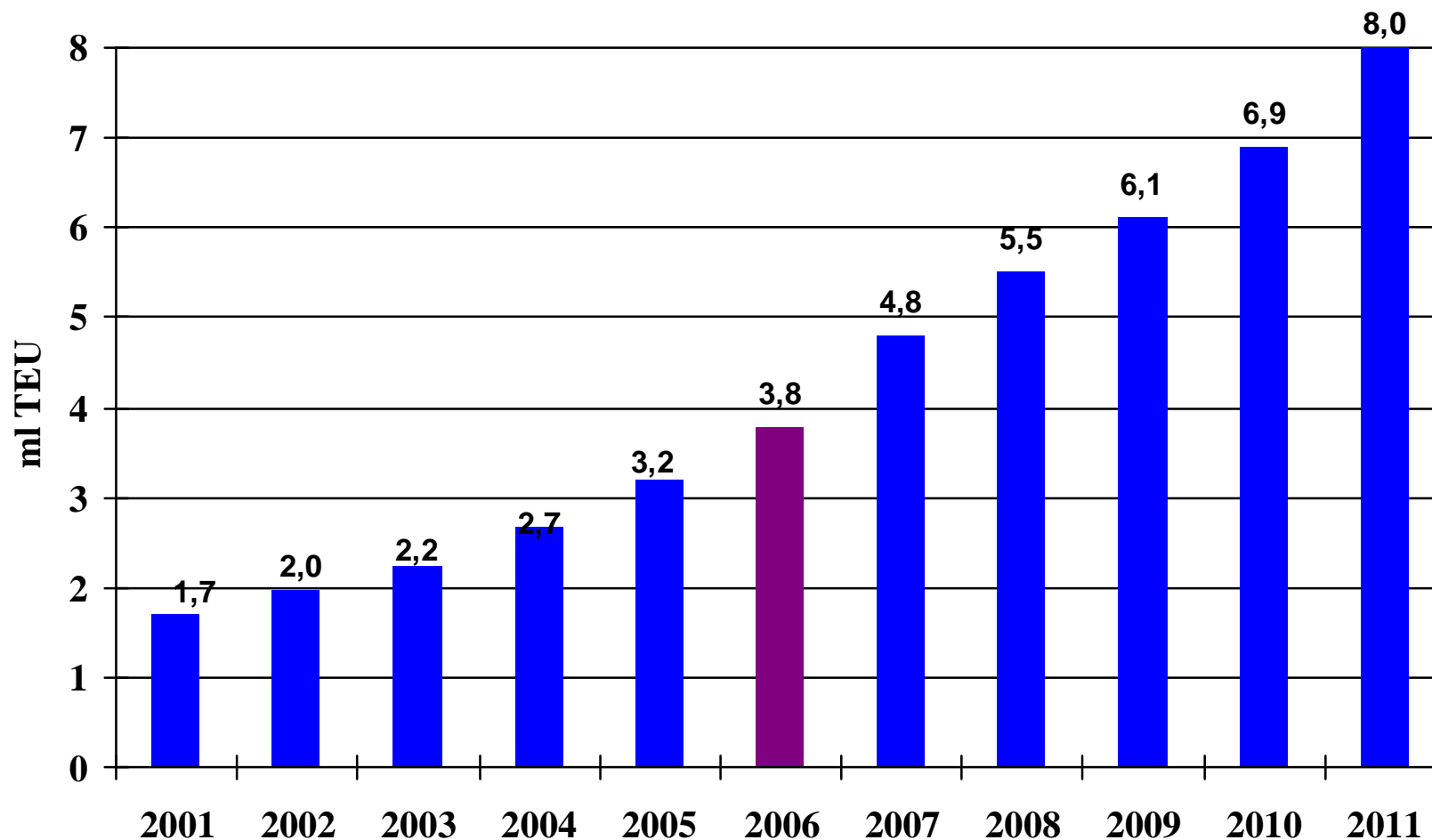
Tallinn – 128 thous. TEU

Riga- 169 thous TEU

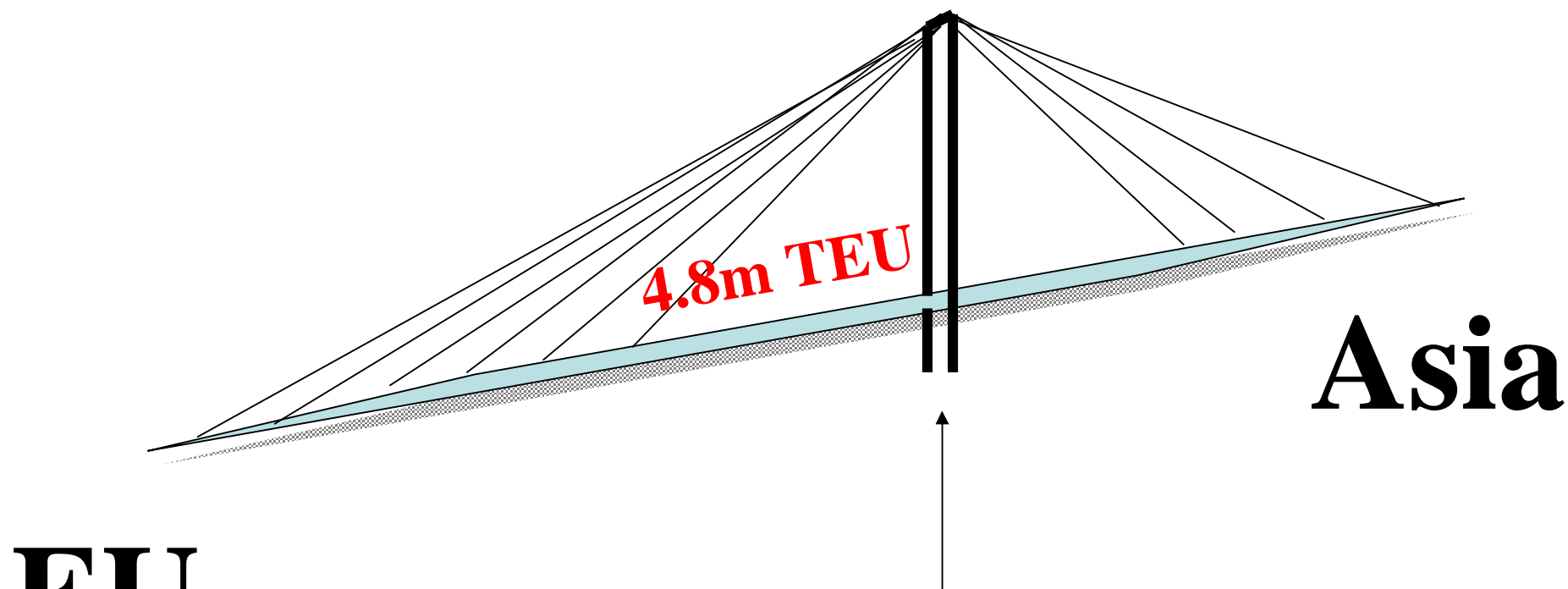
Klaipeda – 214 thous TEU



Container traffic Baltic Sea region potential



Source: Raivo VARE, 2006



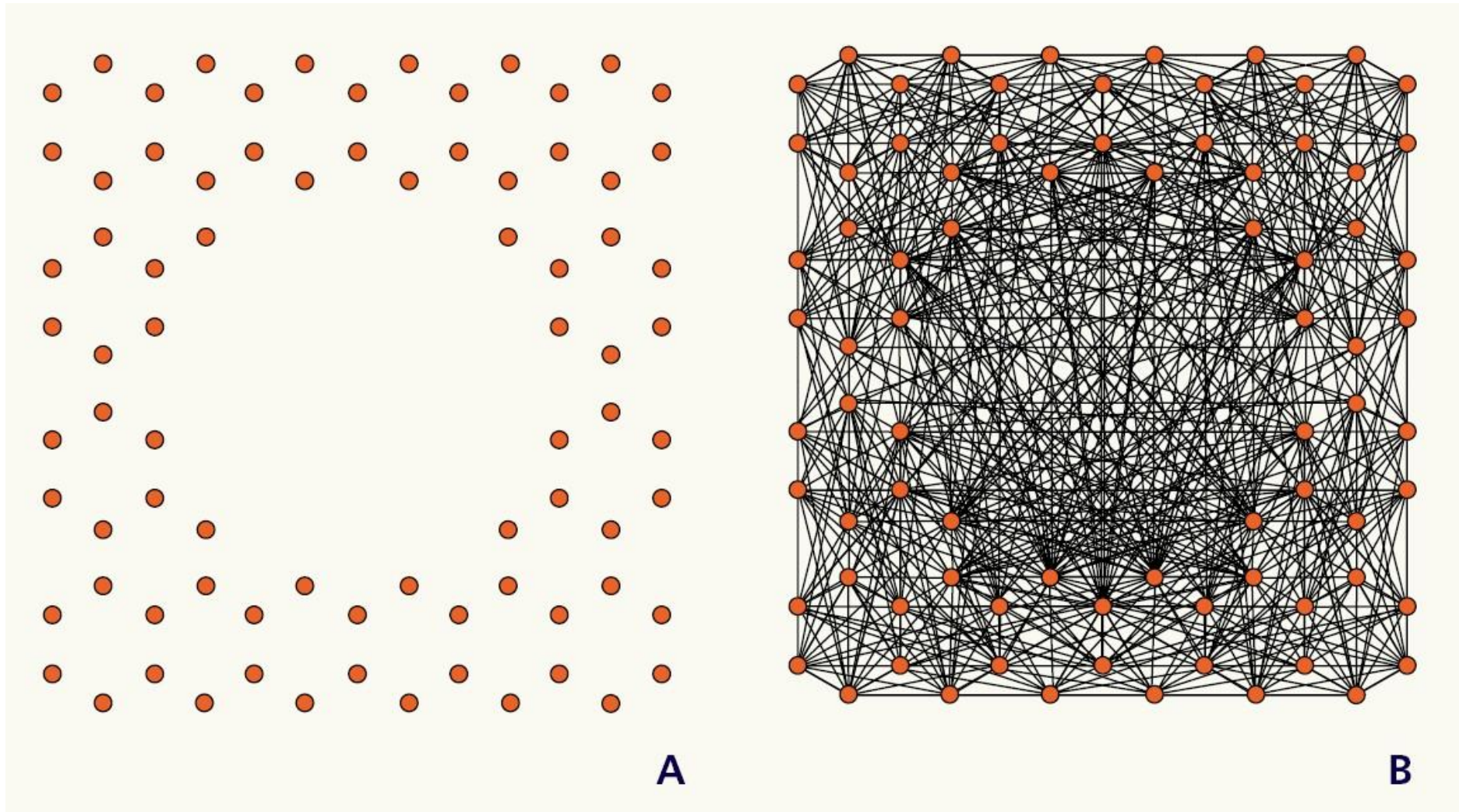
Baltic Countries:

2005 - 515 thous. TEU (59%)

max - 875 thous. TEU

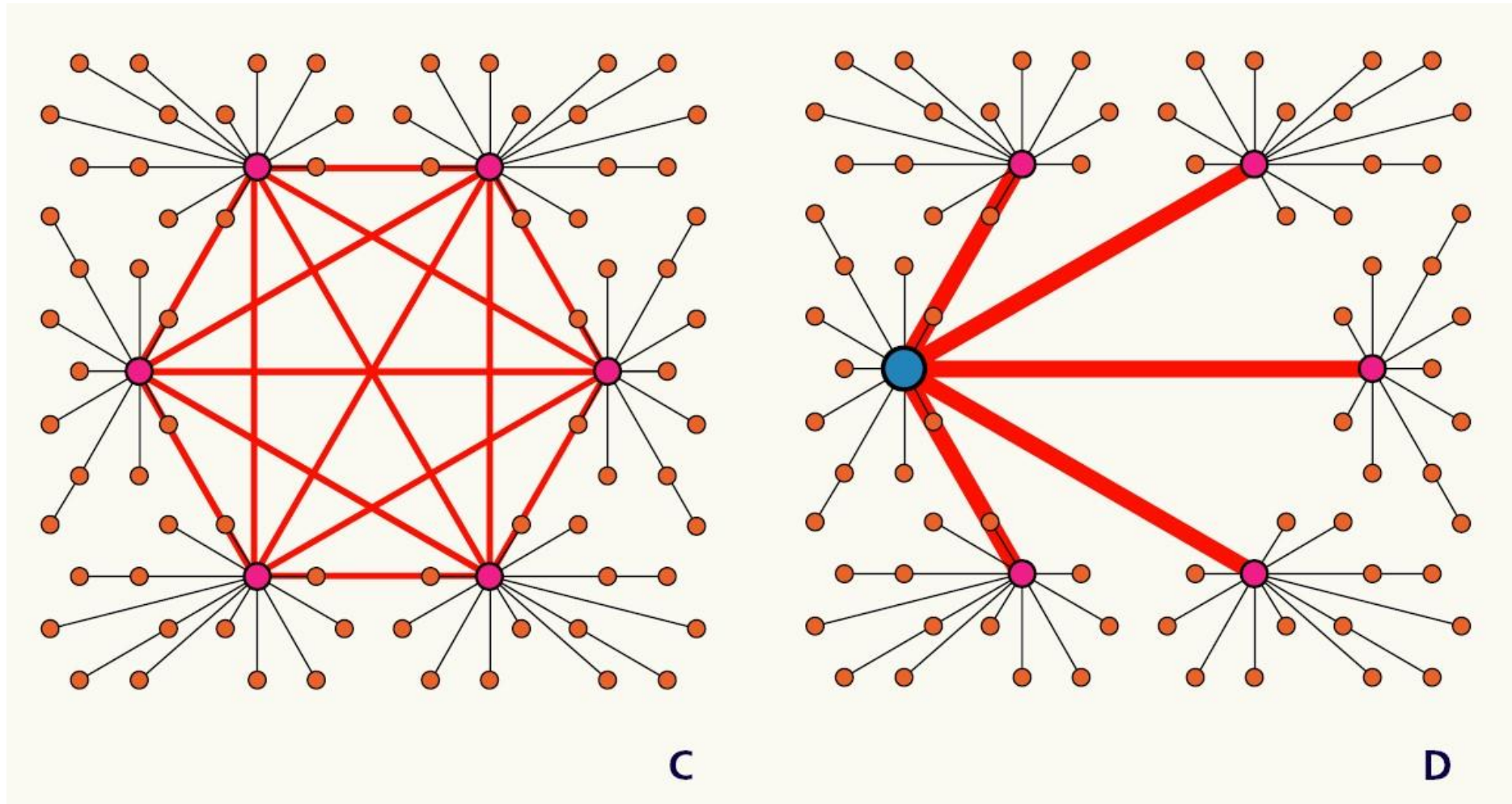
Example:

If all **80** points around the Baltic are to be connected with each other. It would require **3160** routes.

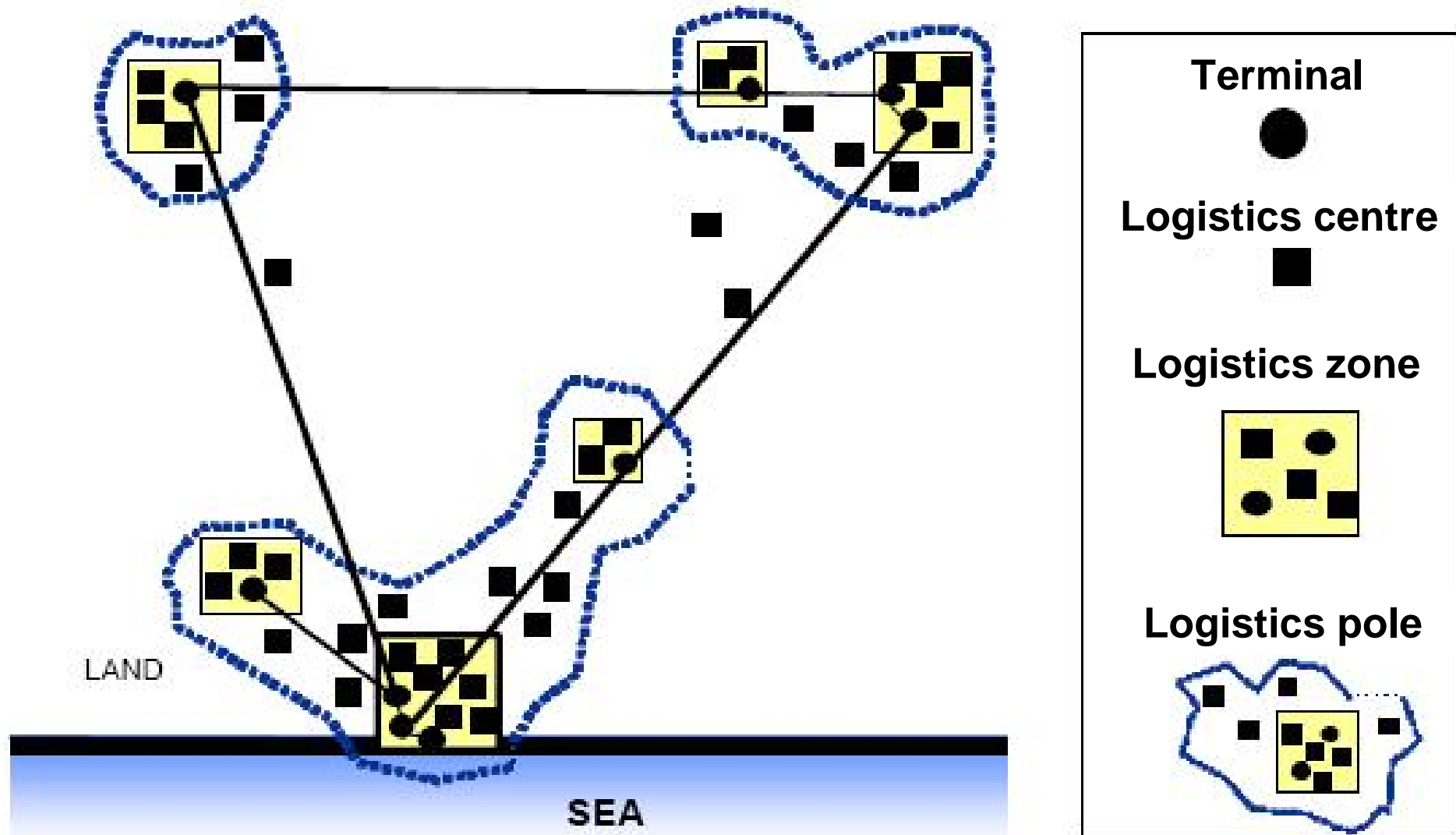


If **6** junctions are established, they can be connected with each other by means of **15** larger routes.

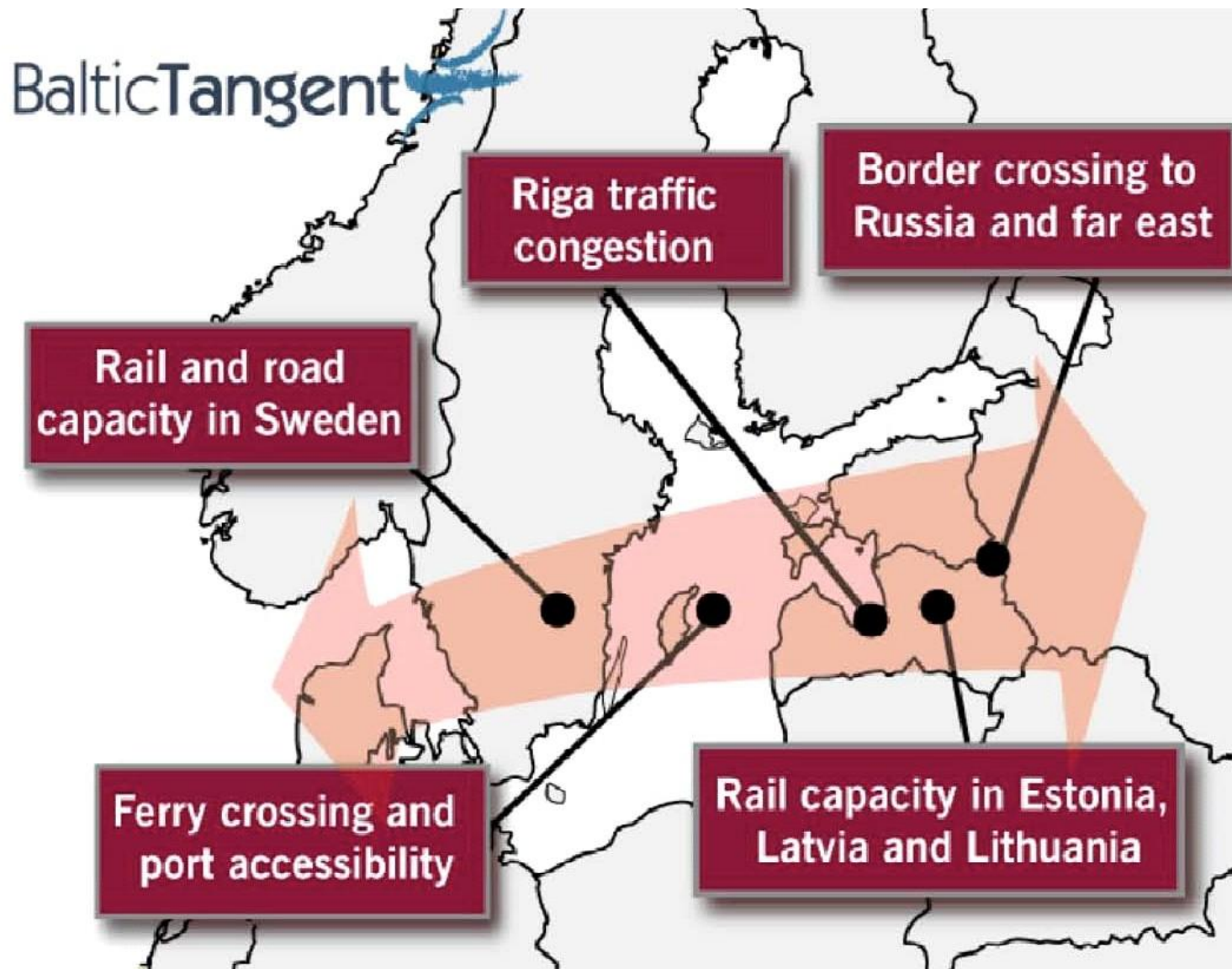
If a superjunction is established, they can be connected by means of **5** junctions and **1** superjunction with **5** superroutes.



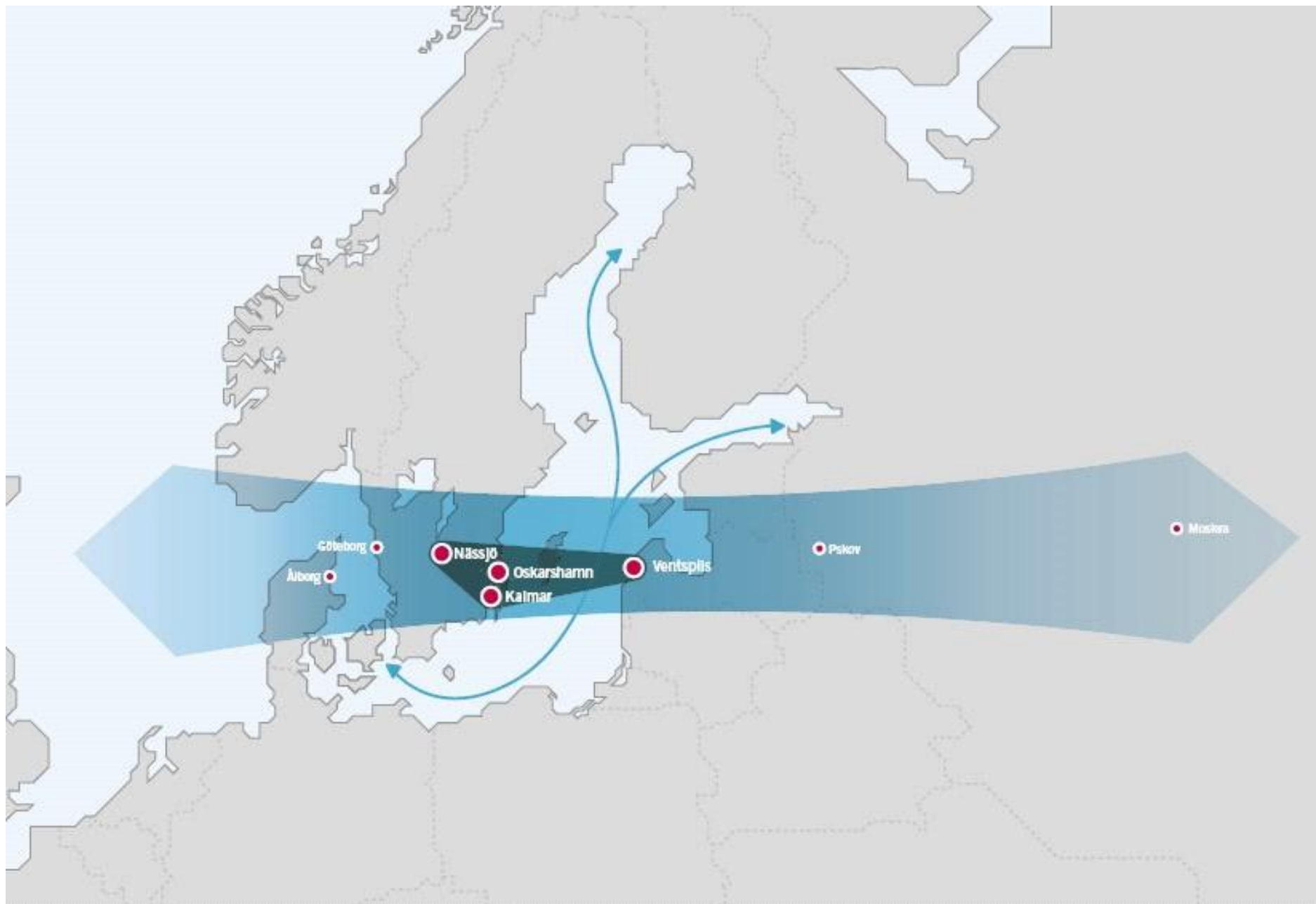
Logistics polarisation and the creation of logistics poles

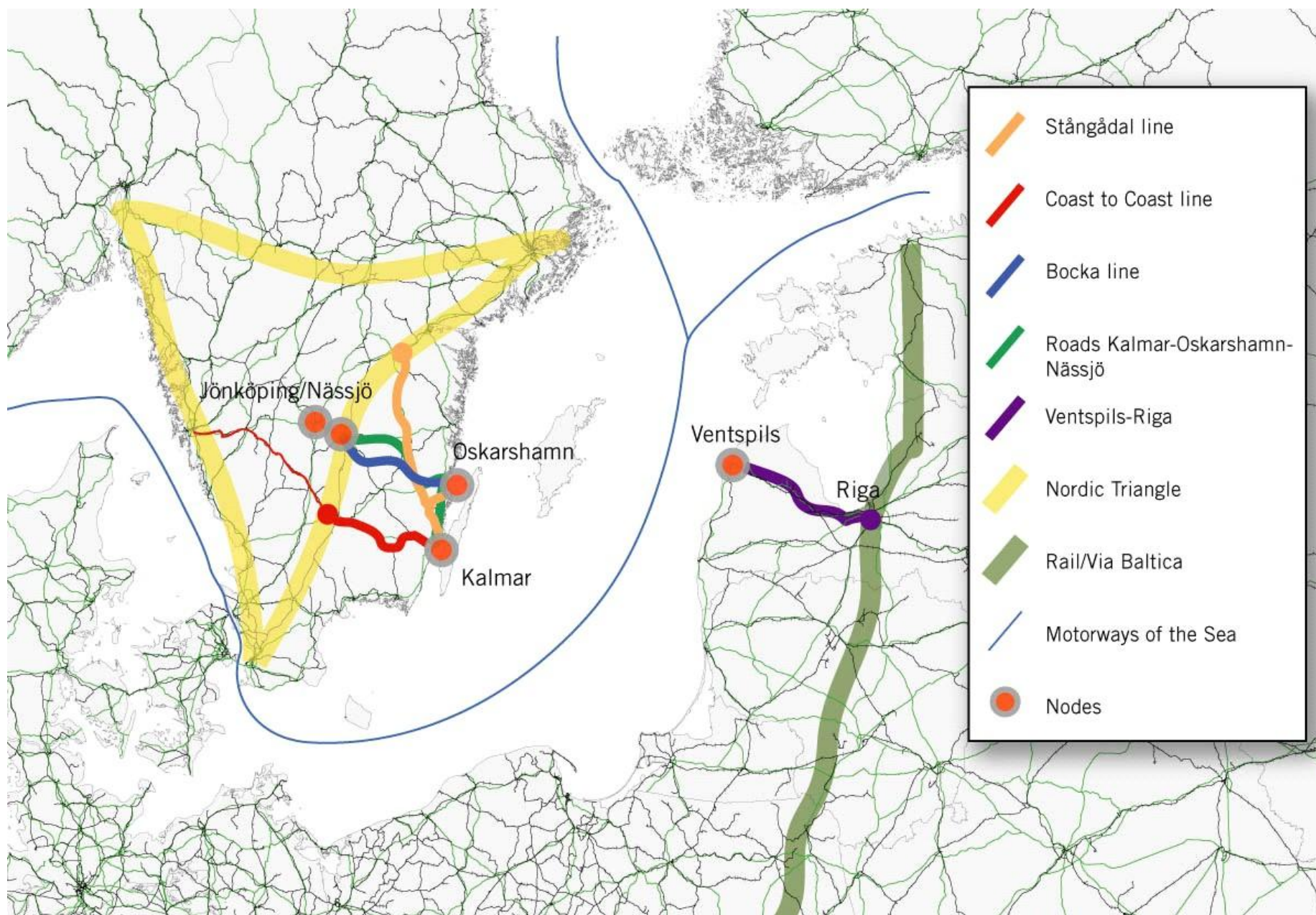


Source: Notteboom (2000)

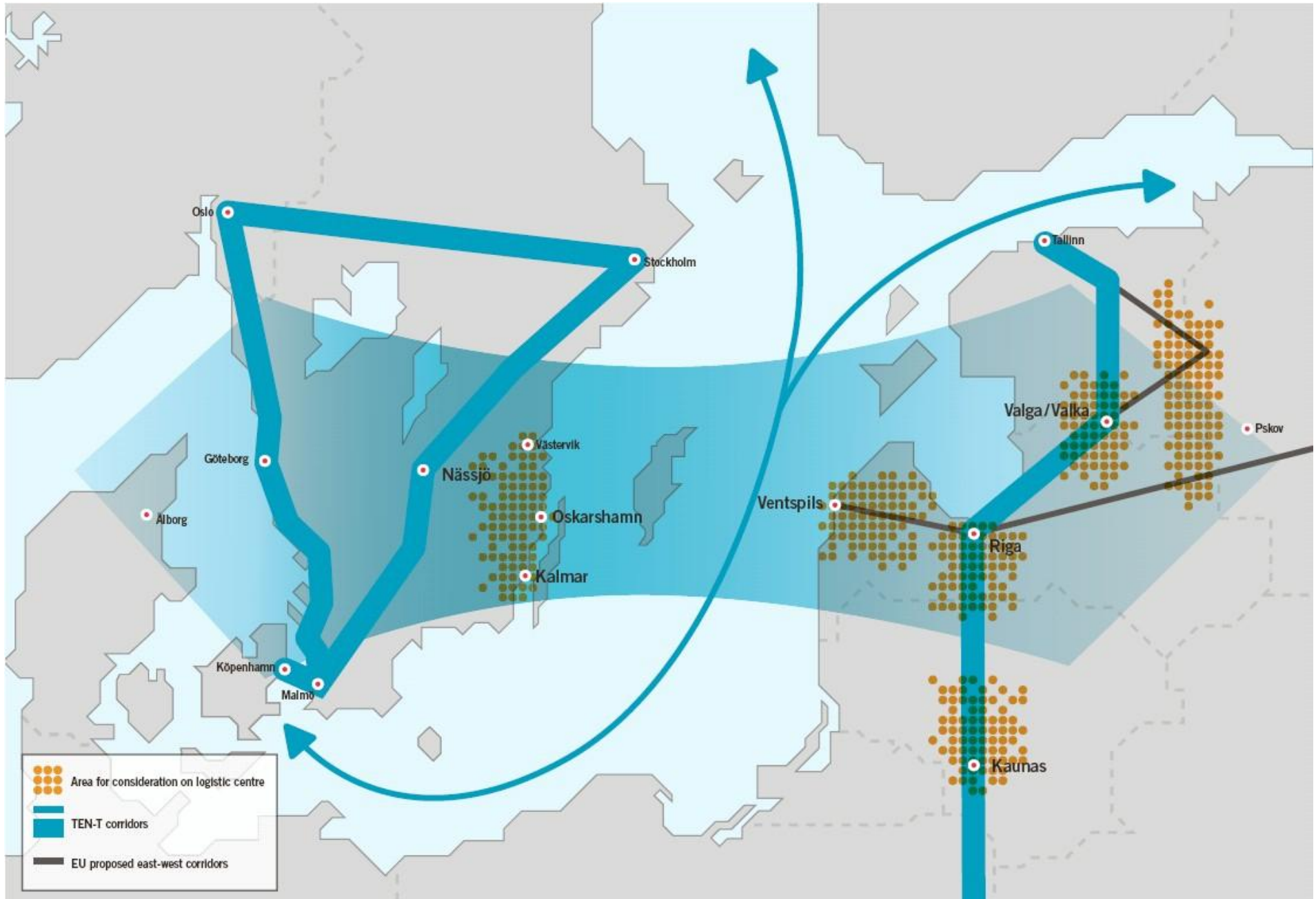


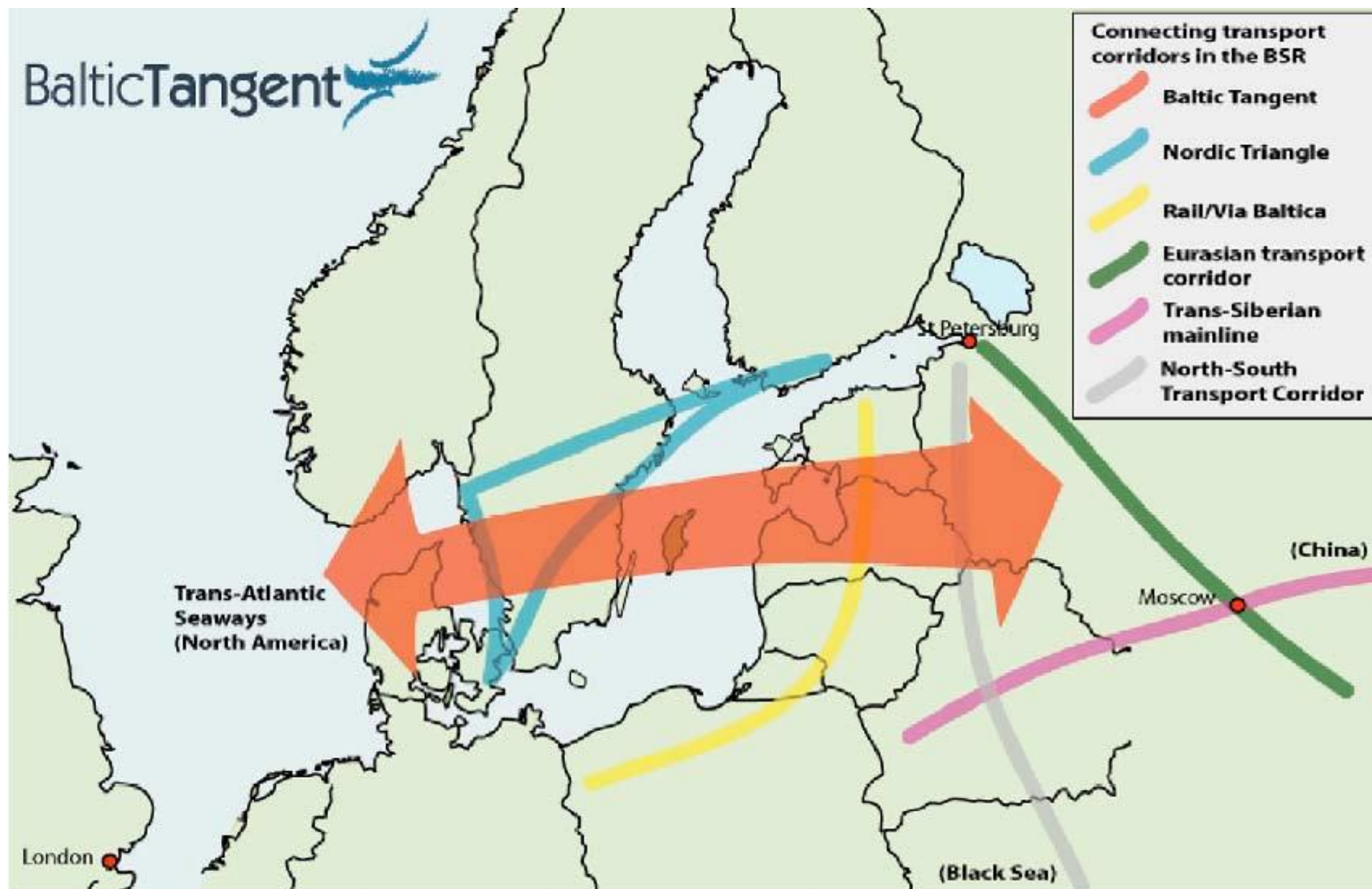
Baltic Connection Ventspils – Oskarshamn (BALCO)





A Baltic Tangent II project







CEMT/TMB(2007)8
For Official Use

For Official Use

Conférence Européenne des Ministres des Transports
European Conference of Ministers of Transport

CEMT/TMB(2007)8

19-Mar-2007

English - Or. English

EUROPEAN CONFERENCE OF MINISTERS OF TRANSPORT TRANSPORT MANAGEMENT BOARD

**THE EXTENT OF AND OUTLOOK FOR CONGESTION IN INLAND,
MARITIME AND AIR TRANSPORT**

The largest ships in service



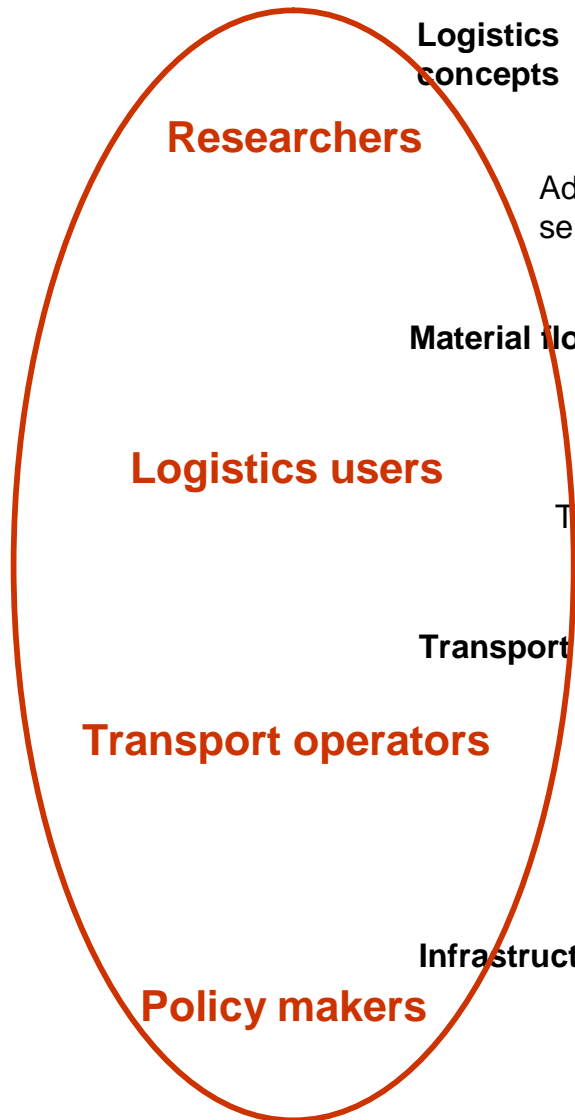
www.gizmodo.com/gadgets/vehicles/oocl-shenzhen-worlds-largest-container-ship-111961.php

The largest ships in service, 3 built for Maersk in 2006, have a capacity of **14 500 TEU**.

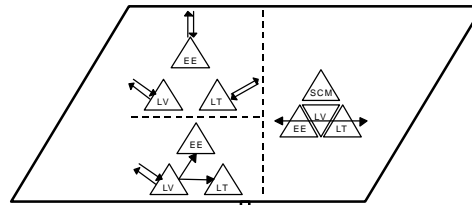
The next step up in size will be the **Malaccamax** ship, carrying **18 000 TEU** with a displacement of 200 000 tons, 470m long, 60m wide, 16m draft, equipped with more than 100 MW power to reach 25 knots.

This is the limit without major restructuring of world trade routes, i.e. still larger vessels would not be able to pass either the Malacca straights or the Suez Canal.

Who are we here for ?

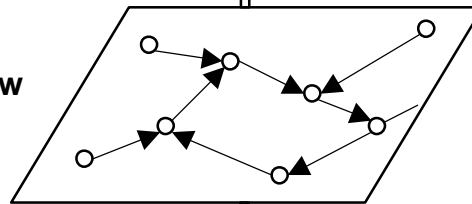


Logistics concepts



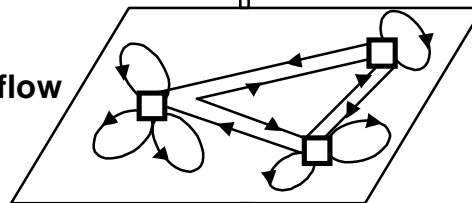
Advanced logistics services market

Material flow



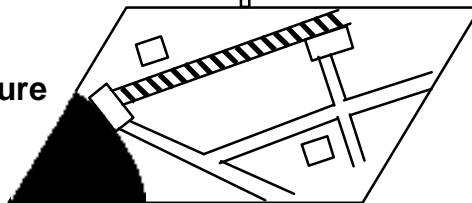
Transport market

Transport flow



Traffic market

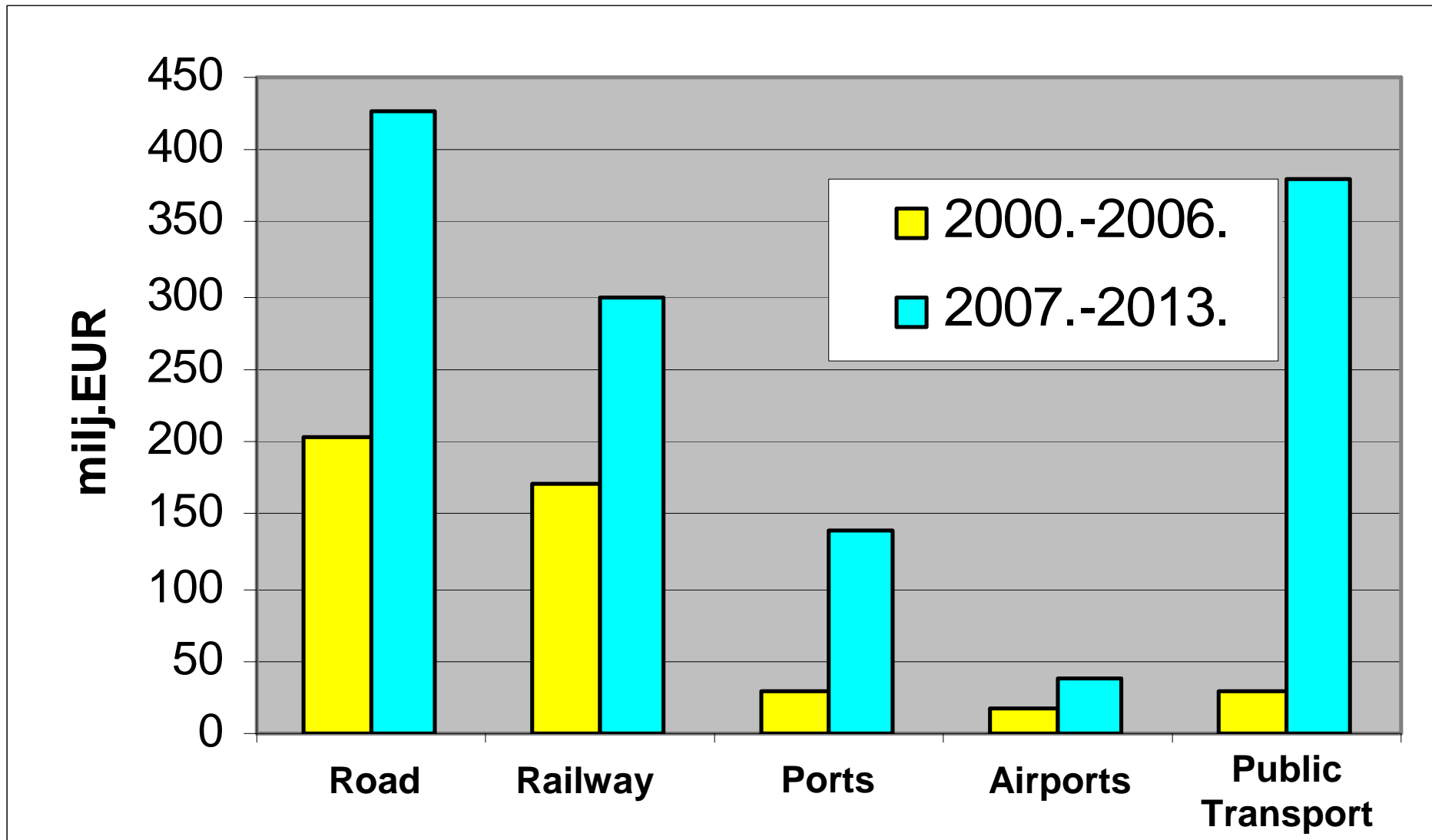
Infrastructure



| Entrance | Establish market position | Present | EU-time (anticipated) |
|----------|---------------------------|---------|-----------------------|
| | | | |
| | | | X |
| | | X | |
| | X | | |
| X | | | |

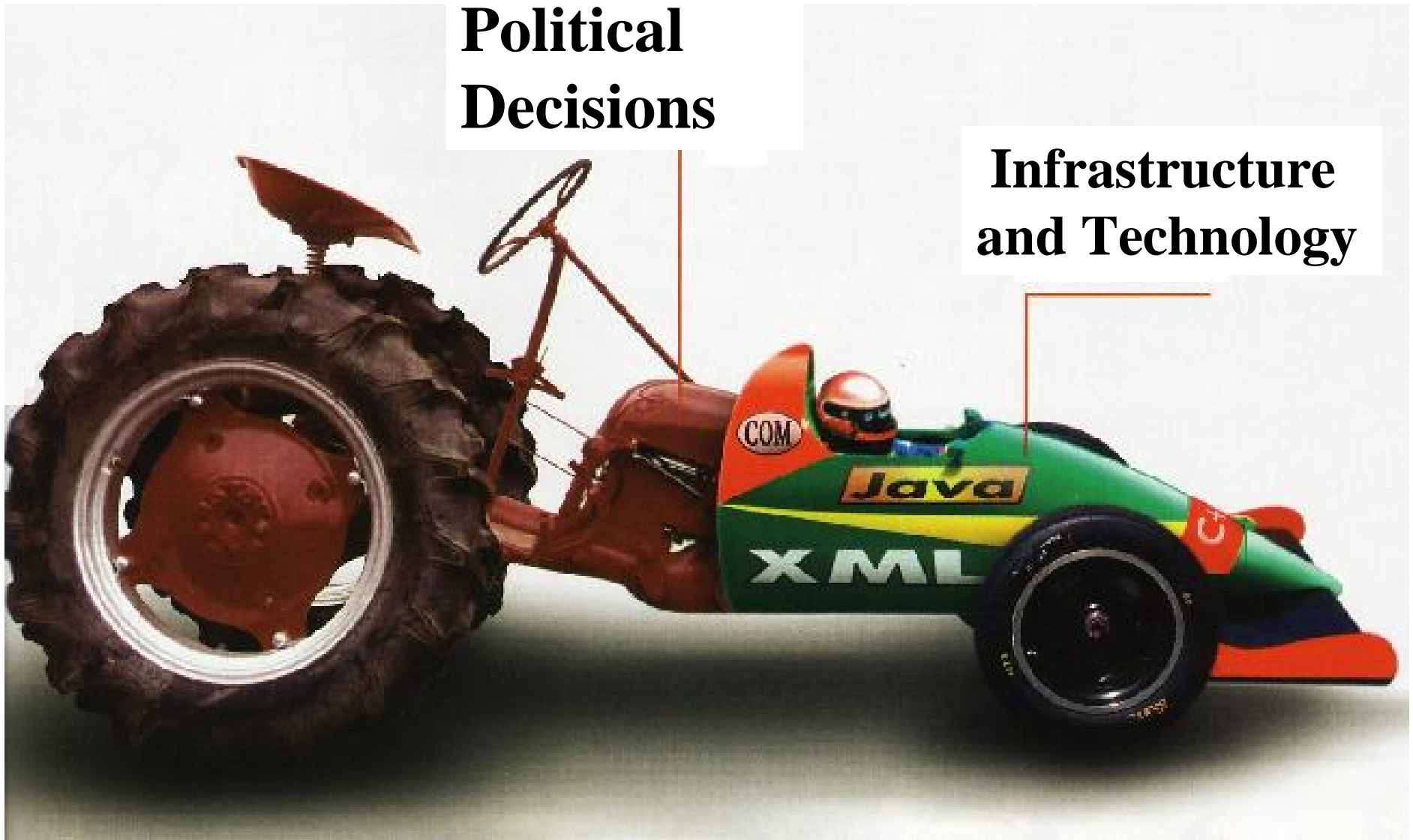
Source: AdLog study 2003

Resources of EU funds for transport infrastructure (million EUR / Year)



**Political
Decisions**

**Infrastructure
and Technology**











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