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TIGER Dry Ports solutions Vs Non-Dry Ports

By Franco Castagnetti, TIGER Project Leader

Freight Villages, Mega Hubs and container terminals are vital components of the intermodal transport chain. They are the links allowing the execution of rail intermodality in an industrial way increasing the capacity of the existing rail infrastructure. Their open accessibility is assuring an effective competition between old and new rail freight operators providing the ultimate users with the possibility of making the service choice more appropriate for their needs.

This is even more so for the maritime intermodal traffic generated by the new giant containers vessels which have introduced into the overland distribution the dimension of economies of scale unthinkable only few years ago. While the sea ports have made investments capable of handling these vessels and the volumes expressed thereof, the available rail and road network necessary for moving the traffic to final destinations has remained unchanged. The bottlenecks have progressively moved from ship-shore one step down the chain to shore-inland distribution. A sophistication of the traditional intermodal distribution pattern is required introducing a new business model based on a new generation of Dry Ports. These must be capable of handling in an industrial way the maritime traffic expressed by these giant containers vessels which calling at a fewer number of ports produce an increased number of movements. The Dry Ports are not supposed to substitute the existing transport chains when these are efficient and cost effective. They are designed to complement them absorbing the planned traffic volumes increases which will generate port congestion if not promptly moved inland. Port infrastructures cannot be expanded indefinitely and they are already a limited resource. Investments in works at sea are more expensive, lengthy and complex than works on land. The Dry Ports and Mega Hubs locations are being reconsidered anyway following the progressive process of rail freight liberalisation, the market opening in a borderless Union and the new regulation concerning the European rail network for competitive freight approved by the EU Parliament. The Dry Ports are instrumental for applying the Extended Quay Concept bringing traffic nearer to the customers and acting as new integrated distribution platforms. TIGER project is proving the validity of this concept.

Issue 2 January 2011

TIGER AT A GLANCE

TIGER is the acronym of *Transit via Innovative Gateway concepts solving European - intermodal Rail needs*

The project officially started on 1 October 2009. Project duration is 36 months. The First TIGER newsletter was issued in May 2010. This first newsletter issued shortly after the project kick-off wanted to mark the first significant project steps. This second newsletter has the objective of describing the TIGER project progress.

The Project Rationale during and after the recession

After having described in the First TIGER newsletter the project objectives, it was important to verify the project rationale after Europe endured a considerable drop in its economic activities.

While the project rationale was easily identified before the recession time, such rationale was in need of a reappraisal in the light of the substantial traffic reduction experienced in the European Sea Ports activities during the years 2008, 2009 and partially beginning 2010.

In fact during such recession years where traffic reduction in many cases exceeded 20% the congestion both in the Ports and in the hinterland almost disappeared. The major shipping lines who meantime had taken delivery of their new fleets of giant CTS vessels adopted the ESS (Extra Slow Steaming) strategy to minimize the negative impact of the traffic shortage by reducing the slots offer in the market place. All the TIGER partners reconfirmed their firm belief on the validity of the project rationale. This on the basis that the traffic reduction was only temporary. As soon as the economic activity would recover the Ports would be in a worse situation than before unless these recession years were used for making new investments and reviewing completely the work processes. Particular attention was to be given to the connections with the hinterland distribution network based on the Dry Ports concept. The TIGER project partners were all adamant in implementing such business philosophy and indeed they continued their investments together with the rationalization of their production programs in order to be efficient and competitive when traffic volumes would return after the recession.

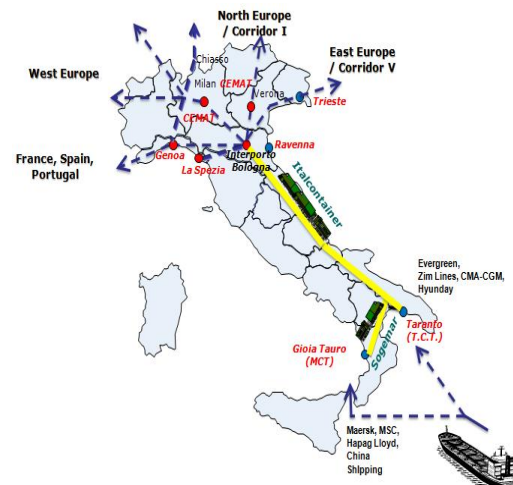
This project rationale is confirmed by the results emerged from the findings of the WP1 research Report on CTS maritime traffic 2015/2020. This research indicates that indeed traffic volumes are coming back faster than anyone had anticipated. Port capacity is an aspect to be confronted with and to be resolved. TIGER project rationale is responding to this challenge.



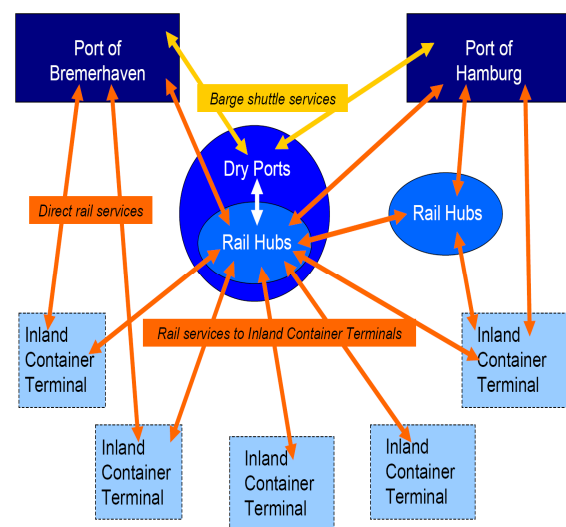
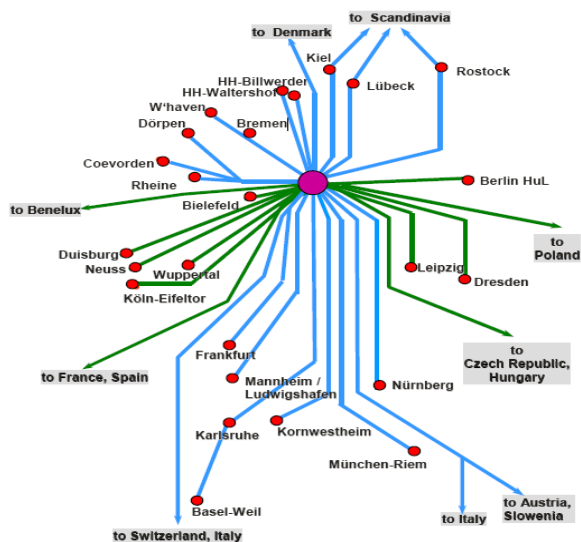
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The TIGER Project is constituted by 4 Demonstrators:

The MARIPLAT % α +concept.



The INNOVATIVE PORT & HINTERLAND OPERATIONS %PORT Web+concept



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THE PROJECT ACTIVITIES

Market Assessment Task 1.1

- NEWO Leadership -

The third WP1 Task 1.1 meeting took place in Hamburg on 16th and 17th June. The opportunity was taken by the Working Group members to visit the Hamburg Port facilities at full work by the sea. To this effect a boat was hired by HHM who led the team explaining in details the Port activities during operations. The technical characteristics of the port were illustrated such as the length of the river up to open sea, the hours necessary to cover the distance, the draught currently available and the dredging to be carried out in order to accommodate bigger vessels.

The members saw several vessels being loaded-unloaded including ocean ones as well as feeders, giant CTS cranes handling them, the rail terminals at work, specialised conventional facilities, docking and undocking operations of a ship supported by tugboats.

The meeting was very productive having been properly prepared through the exchanges of the 11th version of the draft deliverable. The meeting was very important since the NESTEAR research relying on the COMEXT and EUROSTAT database was ready for presentation. The result of the NESTEAR research was attached as Annex 1 to the deliverable. During the meeting many contributions were made when comparing the three research results. One research elaboration adopted the CAGR (Compound Annual Growth Rate) approach, the second one the European GDP projections corrected by local economic factors and the third one the NESTEAR mathematical modelling as above. Some differences as it was expected materialized into the traffic projections 2015/2020 since the database were different, however it was important to realise that indeed the projections pointed in the same direction. These differences turned out to be of value giving the Working Group members the opportunity to evaluate them and giving them the proper consideration. It was therefore agreed that each port



The Hamburg Port in operation

would make its own projections based on its competitive profile, its own market circumstances and the economy development of its trading partners. At the same time it was decided to add an additional function to the tool provided by HHM by which it would be possible to make the automatic projection and the graphs by identifying correctly the hinterland traffic split divided by rail, road, barge and feeder for the decade 2000/2009. The modal split so obtained with this tool functionality constitute the database for starting the Task 1.2 research.

With such decisions being taken every WP1 partner could elaborate the figures according to these directives leading to the WP1 Task 1.1 deliverable completion. The WP1 Task 1.1 deliverable results were presented at the First TIGER Annual Event which took place in Brussels on November 23rd 2010.



The TIGER WP1 Task 1.1 - Working Group picture
Hamburg Port



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Market Assessment Task 1.2

- NEWO Leadership -

The first WP1 Task 1.2 meeting took place in Bologna on October 28th 2010. Dr Theodor Schlickmann, the EC TIGER project officer, was also in attendance.

Before the meeting the Work Package leader NEWOPERA distributed version 5 of the Draft Deliverable. This included the index, the methodology as well as part of Chapter 2 where the database necessary for developing this research is contained. Before the meeting HHM was properly activated in order to prepare a projection tool for calculating the hinterland traffic segmented projections for each transport mode. This tool allows the projection 2015/2020 of the overland traffic via the various routings considering each port nominated Rail network and the appropriate Dry Ports of reference.

Future investments in Ports and hinterland Rail infrastructures are planned and described in order to build up the proper prevailing scenario 2015/2020 capable of sustaining the forecasted traffic volumes assigned to the hinterland network.

During the meeting an ad hoc presentation was elaborated by NEWOPERA starting from WP1 Task 1.1 results and describing the future objectives to be researched during Task 1.2. This presentation was instrumental for promoting large and intense debate by all participants. The meeting was well attended and the opportunity was used to illustrate the Bologna Interporto Dry Port characteristics. During the discussion some very interesting contributions were made such as:

- Compare the Dry Port business model versus the non Dry Port alternative;
- The role to be played by private transport operators/investors/innovators/optimisers etc;
- The role of shipping lines/operators/shippers/consignees in driving the Sea Ports/ Hinterland optimisation influencing the B/L delivery conditions;
- The role played by traffic imbalances on shipping lines marketing approach;
- The key actors of the maritime transport chain cooperative approach to be promoted/ supported;
- The role of the traffic gravity attraction areas influenced by shipping lines commercial policies;
- The role played by hinterland connections when comparing Med Hub Ports Vs North African ones.

NESTEAR could not attend but sent a contribution which was very interesting and largely debated particularly on its reference to the TIGER ports competitive reach and the PortPrint gravity model.

HHM had also prepared a presentation for the tool to be adopted in Task 1.2. Following several observations it was decided that the tool had to be slightly adjusted in order to better reflect the changing market situation. After the meeting in Bologna, HHM sent the revised version of the tool to be used during the research. Before the end of the meeting the Road Map leading to the Task 1.2 Deliverable completion was agreed including the tasks to be fulfilled as well as the time frame for completion. The next and final meeting will

take place in Rome on January 31st hosted by Trenitalia Cargo.

Tech. Coordination - HaCon Leadership

September 30th 2010 marked the first full year into the TIGER project. A number of Deliverables have been completed and delivered to the EU Commission. These Deliverables are:

- D H3.1 Quality Plan
- D H3.2 Deliverable & Knowledge database
- D H4.1 TIGER public website
- D 4A.1 Plan for Training Activities (GFC)
- D H4.2 Organisation of the 1st TIGER Conference and issuing of the first TIGER Newsletter
- D 1.1 Report on CTS maritime traffic with particular reference to the North and South TIGER ports (WP1)
- D 2A.1 Report on overall RTD and engineering activities of Genoa Fast Corridor (GFC)
- D 2B.1 Report on ports traffic and gaps on the MARIPLAT corridor
- D 2C.1 Report on the initial situation and challenges in the German Sea Ports (iPORT)
- D 2D.1 Report on suitable bundling points selection and regional satellite terminals and on production concepts integrating rail hubs (MEGAHUB)
- D 3A.1 Report on new state of the art organisational logistics chain process (GFC)
- D H1.1 Periodic Report

A peer review process has been carried out for all deliverables prior to their submission in order to secure high quality standards.

These deliverables are the result of the intensive project work by the consortium partners and their affiliates, coordinated by the tutors allocated by the Technical Coordinator HaCon.

In order to facilitate the project technical tasks, HaCon has established a local branch in Italy. Mrs Miriam Mascolo and Mr Francesco Grotti, former representatives of Rail Traction Company, coordinated the research and development work of the two Italian demonstrators supported by HaCon Technical Director Mr Lars Deiterding and its Legal Advisor Mr René Keppler.

For such large scale projects it is not unusual that minor adjustments to the original plan have to be managed. These adjustments occurred also in TIGER but none of them affected the demonstrators targets having introduced adequate corrective measures. In order to keep under continuous control the project development preventing that any adaptation brought about by external factors could have negative impacts on its results, HaCon supported by the Demonstrator Leaders prepared a comprehensive Risk Management Plan. This Plan takes into account commercial evolution, political investments decisions, market developments, technical problems and other relevant sources of risk.



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In the first year of TIGER lifetime several Project Board meetings have been organised to develop the demonstrators in a coherent way as planned.

European Commission Project Review

During the month of September 2010, the EC informed the TIGER management that a TIGER project review was to be carried out by a team of professionals for account of the European Commission.

The process started with the first meeting which took place in Milan on September 17th. After this informative meeting where the TIGER project was presented, the formal project review could start with an official meeting which took place in Brussels on October 11th between TIGER management team and the reviewers. The TIGER project state of the art was made and the documents/deliverables issued so far were sent to the reviewers for allowing them to write their report.

Project Management . TRAIN Leadership

The First Project Periodic Report has been issued and delivered as planned.

Steering & Project Board

On November 22nd 2010 the day before the First TIGER Annual Event, the Steering & Project Boards were convened in Brussels at the Renaissance Hotel. The opportunity of all project partners being in Brussels was taken bringing them together and updating the full TIGER project status. This was a unique occasion for facilitating the TIGER project networking activities, promote the partners personal acquaintance reinforcing the partners dedication to the project objectives.

Following the Steering and Project Board meetings which took place between h. 14,30 . 18,00 a networking dinner was organised in the same hotel.

During the Project Board chaired by HaCon each TIGER Demonstrator leader made a full report on their individual project situation underlining any problem encountered together with the planned solutions. HaCon in particular made a presentation on the risk assessment procedure and TRAIN reported on the resources allocated and spent during the first TIGER project year. Comparisons and comments were made regarding each project partner situation.

The Steering Board was chaired by NEWOPERA and the suggestions made by the Project Board were approved and validated. A full TIGER project situation both from the technical and administration coordination was made underlining the need of exercising full control on the possible project weak links. A specific report was made on the first periodic report lodged to the European Commission and to the project reviewers.

All TIGER partners were totally committed to the project and to the fulfilment of the commitments undertaken with the TIGER project contract. A full scale demonstration from the pilot will be undertaken with TIGER DEMO project which is likely to start during Spring of 2011.

THE FIRST TIGER ANNUAL EVENT

. NEWO Leadership with UNIFE

The First TIGER Annual Event took place in Brussels on November 23rd at the Bibliothèque Solvay . Leopold Park. This event was organised together with HINTERPORT, which is a Marco Polo financed project. Both TIGER and HINTERPORT address the European Sea Ports and hinterland topics. The two projects have two separate approaches but the target is the same. For this reason it was decided to have one joint event in order to optimise the available resources and for achieving effective cross fertilization.

The invitation to the event was fulfilled by entrusting to a specialised internet operator AGIS Lab the dissemination of the Agenda, the invitation letter, the booking form and the hotel list to the target of 3.500 addresses. Four mailing shots were activated receiving for each one of them a proper report. UNIFE was an active partner in the organisation process. They kept updated the booking sheets, printed the attendance and speakers list and supported NEWOPERA in the logistic organisation of the event. NEWOPERA was in charge of the whole organisation for the TIGER project. The emerging costs were shared between TIGER and HINTERPORT. NEWOPERA took care of every details including the printing of the personalised folders and flyers. It was decided to put inside the folder the attendance and speakers list, the flyer with the agenda and a TIGER project sheet summing up the main features of the four TIGER demonstrators. In addition there were two notes and questions sheets. HINTERPORT produced the same document so that the participants could have in short the brief outline of both projects. A professional photographer was engaged for the day to support the dissemination effort. The progressive updating of the Agenda was published in the TIGER website under the Events section. The acts of the Conference were uploaded on the TIGER website.

The keynote opening speech addressed to the Conference was made by Dr Dirk Van Vreckem Advisor to the DG MOVE Deputy Director General and by Ms Kalina Atanassova EACI Project Officer. Dr Theodor Schlickmann TIGER Project Officer was also in attendance and contributed to the conference proceedings.

The mail invitation tool prepared together with AGIS Lab proved to be effective since booking were stopped ten days before the event having approached 160 registered delegates being the full capacity of Bibliothèque Solvay. It was the intention of the organiser not to overcrowd the meeting room.

The event organisation was centred around the traffic projections 2015/2020 researched during the last twelve months by WP1 Market Assessment/Potential Task 1.1. Mr Castagnetti TIGER Project Leader made this presentation being also WP1 Leader. Two Panels were convened to respond to the emerging results of such presentation. Panel 1 moderated by Armand Toubol (NEWOPERA) was constituted by Manfred Reuter (Hamburg Port Authority), Luigi Barone (Genoa Port Authority), Rüdiger Beckmann (Jade Weser Port) and



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Helen De Wachter (Port of Antwerp). Panel 2 moderated by Andreas Nigulis (Vector PTS) was constituted by Reiner Mertel (Kombiverkehr), Sebastiano Grasso (Sogemar) and Maurizio De Fazio (Italcantainer). These two panels were separated by the TIGER session on New Developments for Inland Dry Ports with individual presentation of Roberto Arghenini (Rivalta Terminal Europa), Marian Gaidzik (Lehrte Mega Hub) and Pietro Spirito (Interporto Bologna). This was followed by the HINTERPORT session on Common Learning for Best Practices with individual presentations of Rod Loader (Interporto Campano), Thomas Nobel (DGG-GVZ) and Antonio Torregrosa (Valencia Port Foundation). The audience interacted with the panels and speakers in all four conference sessions providing useful observations, precious input and market reactions. The debate was very positive and lively to the benefit of both the organisers and market actors alike.

The event conclusions were drawn by Horst Kubek (NEWOPERA) with closing remarks made by Franco Castagnetti for TIGER and Angelo Aulicino (Interporto Bologna) for HINTERPORT.

The meeting results were multi-folds. Just to cite the most important, these are here below indicated:

- The results of WP1 research projecting traffic volumes to 2015/2020 were not forgone. The European Ports technical capacity will be reached by then hence the validity of the TIGER project planned solutions.
- The better use of the existing Rail infrastructure is a must+ despite the investment planned to be completed by 2020.
- Dry Ports are nodal points for achieving the Sea Ports decongestion objectives giving at the same time a better service to the users.
- The transport industrialisation from the Ports to inland destinations is an objective to be pursued without uncertainties and the Rail mode is capable of providing this solution at reduced costs.
- Longer heavier and faster trains can be organised on the existing network from Point to Point and to this effect Mega Hubs/ Freight Villages/ Terminals are an integral part of the co-modal approach.
- Logistics is an essential science for improving the quality of life of the European citizens. It is able to optimize the existing resources and networks and to contribute through a spatial planning of the logistic infrastructures to a more efficient distribution of the consumer products to and from the urban areas.
- The co-modal approach supported by the European Commission by extracting the best possible performance from each mode represents the best realistic objective for reducing the European carbon footprint and improving the development of environmental friendly transport techniques.



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Events featuring TIGER as from June 2010 - Previous ones in Issue 01 .

8-9 June, Zaragoza - European Commission TEN-T Days 2010
23 June, Rome – FLC Conference
26 July, Brussels – UIC/CER Freight Forum
7-10 September, Bologna, Verona, Genoa, Rivalta –THAI Delegation
17 September, Karlsruhe – Karlsruhe Institute of Technology
21-23 September, Berlin – Innotrans 2010
7 October, Brussels – ERRAC meeting
11 October, Milan – Federchimica Logistics Committee
28-29 October, Bologna – WP1 Task 1.2 Meeting + event
29 October, Paris – BE LOGIC Workshop
4 November, Brussels – CREAM Final Conference
18-19 November, Antwerp – F&L Annual Conference
23 November, Brussels – TIGER First Annual Event
26 November, Warsaw – EIB Regional Forum
2 December, Wien – Rail Net Europe Conference
3 December, Milan - H4 - CODE 24 Rotterdam - Genoa
6 December, Brussels – Greening Logistics Conference
12 January 2011 , Brussels - H4 - FERRMED Conference
31 January 2011, Rome - WP1 - Task 1.2 meeting
1 February 2011, Antwerp - H4 - Super Green Workshop
16-17 February 2011, Rotterdam - H4 - BE LOGIC Final Conference
25 February 2011, Belgrade - H4 -CARGO10 Challenges & Perspectives
22-23 March 2011, Zagreb - H4 - Infrastructure Logistics
5-7 April 2011, NEC Birmingham - H4 - Multimodal 2011



The TIGER Project Partners



The Partners incorporate technical, commercial, engineering, marketing resources and know-how in several fields of activities. These extend from infrastructure management, rail operations, port management to intermodal handling operations. Vital competencies include intermodality, inland dry

ports and freight villages operations, Port Authorities, Institutional Regional Governments, engineering, software & management system technologies as well as marketing & research. Sectorial association connected with Rail industry are also present in the Consortium.



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