

Harbours review

HARBOURS The Harbours 360 Conference

featured summary

03. Connectivity is key

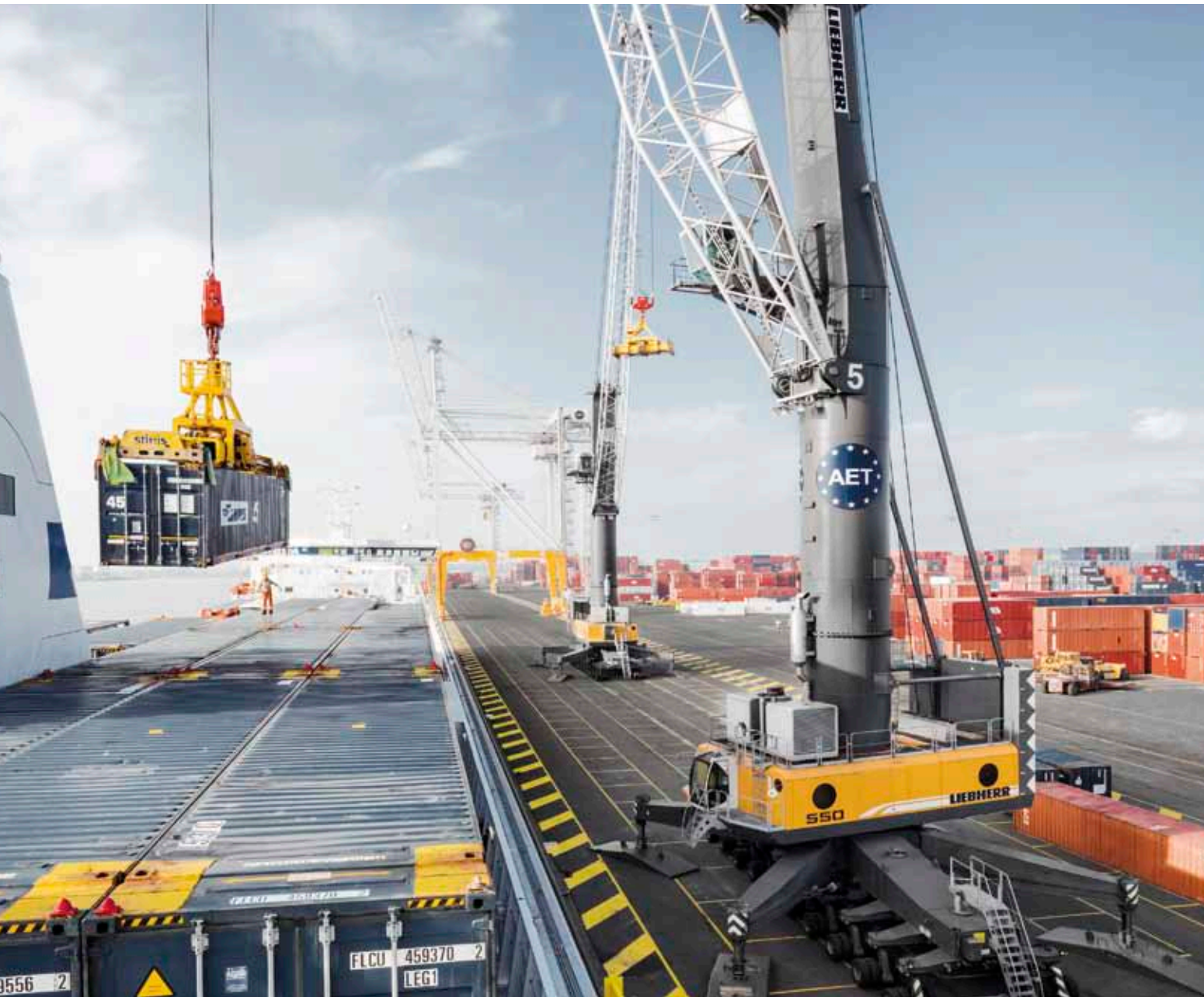
– Summary of the Harbours
360 Conference, November
8th-9th, 2016, Duisburg
Przemysław Myszka

10. HR 360 – conference's agenda



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featured article

Connectivity is key

November 8th-9th, 2016, Duisburg

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by **Przemysław Myszka**



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The second edition of the Harbours 360 Conference took place in Duisburg, home to Europe's largest multimodal dry port, as well as a vital link in the supply chain of the New Silk Road. As such, the sea-rail-road logistics, and how to efficiently link our continent with Central Asia and the Chinese Far East were topical during this autumn's event, gathering speakers, panellists, and an audience from across numerous regions of the so-called Eurasian Land Bridge.

Day 1

The conference was opened by **Erich Staake, the Port of Duisburg's President** who has been leading the 300-year old business for over 18 years now, being today in what he believes, "Duisport's best shape ever," thanks to thinking and operating in customer-focused supply chains. But apart from praising the development (e.g. recently taking over a bankrupt paper mill in order to transform it into a logistics hub), Erich also pinpointed the most burning challenges of our times, including an overcapacity in seaports (particularly with regard to handling sluggish container traffic), to last for the next five years at least due to no significant growth in trade and volume of shipped goods (flat or +2-3%/year at best); the manufacturing-to-Europe re-shoring trend; China's One Belt One Road initiative that aims at bringing trade relations between parties closer along the New Silk Road by daring infrastructural and transport projects; the Industry 4.0 and digital revolution which put more and more pressure on changing our mind-sets in line with disruptive ideas, etc. Erich gave the listeners to understand that the core of the business remains the same, namely making money, but alike in evolution, the environment has changed

considerably, and we must cope with it in order to keep going on.

Erich's views were supplemented by **Alexander Van Der Bosch, the European Federation of Inland Ports' Director**, in his official address. Alexander also mentioned globalization, growth

Harbours 360 Conference

Duisburg, 8 November 2016

Alexander van den Bosch, EFIP Director



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in the Earth's population, the move to digitalize everything, and strive towards sustainability. Interestingly, the last one requires not only what can be tangibly experienced, namely a modal shift to more eco-friendly modes of transport, but maybe most importantly a mental swing, reflected in the question, "Where are we heading for?" In Alexander's

Harbours 360 Conference

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presents

The future of supply chain. From factories to wardrobes

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IVECO

Road transportation on the multimodal landscape

Karl-Martin Studener
Business Director Iveco Austria, Central & Eastern Europe

Harbours 360 Conference, Duisburg/Germany
November 8-9/11, 2016



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The ports alliances
HAROPA Ports case study

Imad Dridi
Harbours 360 Conference
Duisburg on 08 November 2016

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view, we need to think more about the shape of a port of the future, a place that balances the economy-environment-society-technology dynamics, and where innovative ideas are both put to the test and blueprinted from scratch. **In a follow-up presentation later during the conference's Day 1, Alexander** elaborated more on the changing role of inland ports – from being traditional landlords to acting more as matchmakers that bring together different supply chain actors. As a result, win-win partnerships can be established, facilitating an easier process of cargo bundling, better interconnectivity, or more balanced import-export flows. The goal of such matchmaking is clear – improved intra-Europe and worldwide cooperative networks, a step that has the potential to unlock budgets big enough for pursuing new transport developments, like the already mentioned port of the future concept.

Talking about things that are yet to come, **Harbours Review's** keynote speech was devoted to the future of the supply chain. In a scenario-based presentation, we ventured into the implications of three disruptive megatrends – 3D printing, automation and robotics, as well as “the world's end” (this part started with a graphic image of Donald Trump, one day later US President-Elect Donald Trump... An issue stirring many talks behind-the-scenes from the very beginning of Day 2 on November 9th). In light of this, **Karl-Martin Studener, Business Director at IVECO**, made his point on not-so-distant fuel alternatives for heavy duty truck transports. IVECO has for some time now been investing in gas, particularly Liquefied Natural Gas (LNG), but also Compressed Natural Gas (CNG), both of which have benefits over traditional diesel. For instance, fuel theft is virtually impossible here; some expensive diesel-required equipment has also become obsolete; and IVECO's tests show that there's a decrease in repair and maintenance costs, too. Nevertheless, Europe-wide tanking infrastructure is still missing, making use of LNG as lorry fuel economically sound only in certain areas.

Imad Dridi, Head of Haropa Ports' Strategy Unit, made a case study on sea and inland ports cooperation. Haropa Ports is a strategic alliance of three northern French transport and logistics nodes, the deep-water seaport of Le Havre, and the two inland harbours of Rouen and Paris (quite unique in the scale of France as up-to-date the relations between various ports were a

history of competition rather than undertaking joint actions). The alliance was formed to answer present-day market challenges, caused i.a. by the formation and constant re-shaping of shipping alliances as well as limited growth on established trade lanes, resulting in turn in greater demand for logistics performance to gain a competitive edge. In the end, Imad pointed out, continuing to work separately as three entities would undermine the competitiveness of all parties, whereas uniting as one strengthens the position of Le Havre, Rouen, and Paris altogether.

Development and cooperation were also at the centre of a presentation by **Mamuka Bakhtadze, Georgian Railway's CEO**. He presented the company's involvement in two cross-border megaprojects, the Trans Caspian Route (a southern alternative for goods carried on rails on the China-Europe lane), and the Persian Gulf-Black Sea corridor,

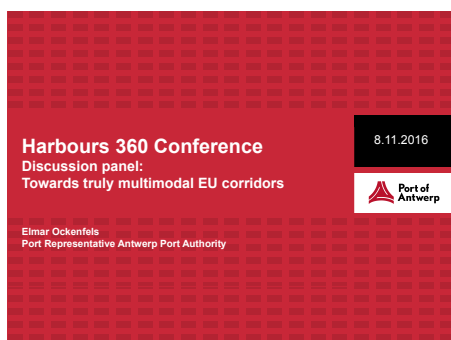


One Road One Belt

Mamuka Bakhtadze
Special Representative of New Silk Road Project

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aimed at bringing Iran and Europe closer to each other, following the recent economic opening of the former. Naturally, Georgia wants to take advantage of its geographical position as a transit country, rail and sea serving cargo flows across both of these strips. For instance, on the Trans Caspian Route Mamuka foresees the volumes to build up from 300 thou. TEU in the short-range, double the figure in the mid-term, up to 1.5 mln TEU in the long-run. Infrastructure development is key, the CEO of Georgian Railway underlined as well. That's why Georgia has invested approx. USD 10 bln over the last years, among many in setting up the brand-new deep-water Port of Anaklia, able to accommodate Post-Panamax vessels, and handle some 7.0 mln tn of freight annually. Asked about troubled political relations in the region, Mamuka replied that thankfully business is – and will remain – more flexible than geopolitics.



One more speech was given before a panel debate kicked off, delivered by **Axel Mattern, the Port of Hamburg Marketing's CEO**, on cooperation and synergies between sea and inland ports. In the case of Hamburg, it closely works with Cuxhaven, Brunsbüttel, Glückstadt, and Stade, all of them located west-of-Hamburg along the Elbe River. But Axel also put a spotlight on Hamburg's close inland waterways, rail and truck ties with Saxony and its terminals, east of the City of Hamburg and its port. Additionally, Axel highlighted Hamburg's IT platform called PORTlog, where all supply chain Hamburg-involved parties can access and share valuable information, hence streamline their businesses and process integration, or get into completely new opportunities.

Apart from Axel Mattern, the subsequent panel discussion ("Towards Truly Multimodal EU Corridors") also gathered **Lina Kostantinopoulou, heading ERTICO's Department of Logistics and Transport, Elmar Ockenfels, representing the Port of Antwerp**, and last but certainly not least – **Laurent Vanden Broeck, in charge of Logistics and Mobility at the Port of Brussels**. The debate opened with the topic of ports' role as an enabler of multimodal transports. Axel started by saying that seaports are located where they've been sitting for centuries now, and obviously there's no changing of this status quo. Irrespective of that, however, the world continues to move if we like it or not. So, Axel went on, in order for them to stay on the market a constant development is simply a must. Huge investments are thus needed, indeed capital and time-intensive, but when played right, they have the potential to alter the playing field to a considerable degree. Nonetheless, shippers are those who decide in the end through which port they send their cargo. A modal shift is clearly needed, Elmar added, both from the perspective of the EU's sustainability goals, but also from Antwerp's

business perspective. Intermodal's (rail) share is currently below 10% in Antwerp, and achieving a 15% mark would greatly add to the port's ability to attract shippers. As such, this second biggest port in Europe is now focusing on developing its ties with Central and Eastern Europe, and towards the Rhine-Ruhr metropolitan region, obviously eyeing any other opportunities as well, like China rail-originating goods. Asked about its port's motto, "A port and a city as one," Brussels' Laurent replied that it's sometimes demanding to live up to this maxim's expectations. It's for instance hard to imagine a more in-city harbour than the Port of Brussels, with territory limited to 105 ha along 14 km of the Antwerp-Brussels-Charleroi Canal, with the city's appetite to grab some of the port's land. Nevertheless, the Port of Brussels wants to be a real partner of the city, adding to its growth and employment, not to mention improving the logistics to, from, and within the Belgian capital. As a result, the port is developing an urban transshipment and redistribution centre for unitized cargo, as well as targets congestion by trying to rail-attract larger volumes of cargo (e.g. looking into perishables from France and Spain; however, securing back-haul cargo is the largest obstacle here). Jumping to the panel's second theme, namely how software can help hardware, Lina identified what seems in her view to be one of the fundamental missing blocks in achieving Europe-wide interoperability, namely the lack of e-connectivity between different transport systems. What the physical infrastructure needs now, Lina asserted, is a digital add-on infrastructure, covering the so-called Intelligent Transport Systems and Services (ITS), multiple sensors feeding big data for further sense- and decision-making, cargo intelligence and end-end supply chain visibility, e-documents, to name but a few. Echoing Alexander's thoughts on a port of the future idea, Lina further added that by providing smart



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tools like Port Community Systems are indispensable in day-to-day work, not to mention more frequent terminal automation to be witnessed in the future. Lastly, the panel's participants were asked about TEN-T developments, what are the up-to-date advances, and what still needs to be covered properly. All the port representatives stressed the importance of screening out the rhetoric from actual works. Only by focusing on concrete and measurable developments can the corridor concept be kept alive. For instance, Elmar underlined the gap between the need to raise both the length and tonnage of trains, and actual (insufficient) efforts made in this regard. Axel said that ports deserve bigger attention in the TEN-T policy. But progress is being made, too, Lina added, and recalled the core issue of the TEN-T map, namely the pan-European character of its corridors, meaning that we need real-time data-connectivity that seamlessly transcends borders of different EU Member States.

low carbon and interoperable ICT technologies can increase the industry's productivity and capacity, improve sea-hinterland flows, paving the way for sustainable smart port cities, nodding her head with understanding towards challenges tabled by Laurent. Axel and Elmar agreed with Lina, telling the audience that the Industry 4.0 is putting new requirements on ports, and

All in all, Day 1 of this year's Harbours 360 Conference was topped with a bus study tour around and through the insides of the Port of Duisburg, where participants had the chance to see how waterways, road, and rail flows meet in one place on a daily logistics basis.

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Day 2

The second part of the Harbours 360 Conference kicked off with a presentation on the development of the **Changchun International Land Port (CILP)**, made by Demi Ben who represents CILP. She told of the ongoing process of reorienting Changchun into a modern logistics hub catering to the needs of the car, air, pharma, farm, and chemical sectors evolving in the region, hence gradually moving the city and the region away from being a heavy industry centre. Phase One of CILP will go online in January of 2017, covering 240 thou. m², and providing container rail handlings, as well as storage, cleaning, and repair services. Phase Two is planned for commissioning a few months later, in August, adding 390 thou. m² (incl. for reefers), along with a customs X-ray inspection and fumigation areas, as well as warehouses for consolidation, truck-flight, and e-commerce goods, and an import finished vehicle testing lab. Both the Phase One and Two areas will be located just next to a Free Trade Zone. The CILP is being developed in order for Changchun to become North-East China's hub for trade along the Eurasian Land Bridge. There are already two rail services originating in Changchun; NCEXpress goes via Manzhouli to

German Schwarzheide, carrying chiefly automotive parts, gourmets and fast moving consumer goods, while NCEXpress II passes through Hunchun onwards to the Russian Port of Slavyanka, and is specialized in dangerous goods. Nevertheless, Demi added, CILP is currently also looking into establishing a joint venture to set-up a reefer block train going on one of the NCEXpresses or both of them.

After Demi's presentation, **Thomas Kargl, CEO of the Far East Land Bridge (FELB)**, and a real veteran when it comes to managing rail services over the New Silk Road, entered the stage. Thomas started with some quick statistics on volumes his company handled over the past two years. Back in 2014, FELB transported 30 thou. laden TEUs, whereas one year later this number went up to 47 thou. TEU, an increase by 56.7% year-on-year. Then Thomas analysed the rationale behind choosing rail over sea shipments on the China-Europe trade lane. It is true that the rail service is more or less tagged with double the price than ocean freight rates, Thomas agreed, but on the other hand, there are also clear benefits to a shorter transit time (16 days on average vs. 40), like short-term capital commitment and small losses of commercial interests. Moreover, Thomas



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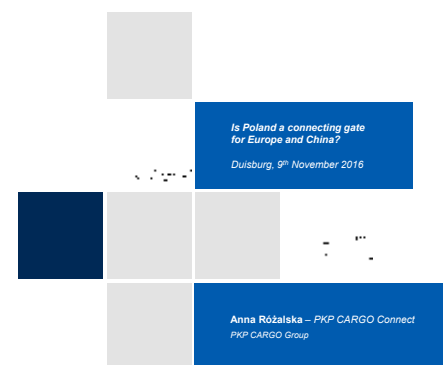
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added, the reliability and simplicity of rail services further add to the attractiveness of overland transportation, all the more valuable in times of high uncertainty that pertains to the global sea shipping business, where one's container can get stuck on-board a vessel whose owner suddenly declares irrevocable bankruptcy. Asked in this regard about the beginnings of FELB (regular traffic commenced in 2009), or more general rail shipments on the New Silk Road, Thomas admitted honestly that the concept ran into all imaginable obstacles from day one (incl. accusations of nuclear contamination...), but in the end everything smoothed out, delivering an invaluable experience which has come in handy many times. All in all, Thomas continued, the market has accepted the service, and now it's up to parties like FELB to push the business case along infrastructural developments. As such, the goal set for 2017/2018 is to further cut the transit time, hopefully to only 10 days on the Shanghai-Central Europe route from today's 16, as well as to balance flows in both directions. The timetable target, together with new route developments, will in turn help to achieve the 1.0 mln TEU/year level in the foreseeable future. Next, **Anna Różalska, PKP CARGO CONNECT's Business Development Manager**, presented her company's efforts on upgrading the Polish (rail) link in the Europe-China supply chain, be with investments in modern multisystem rolling stock, or developing PKP's dry port in Małaszewicze, where the standard and broad gauges meet, and through which the bulk of the New Silk Road's trains pass.

After the last presentation, Anna and Thomas took part in a panel debate ("Bridging Europe with Asia"), joined also

by **Aasim Siddiqui from the All Pakistan Shipping Association (APSA)**, and moderated by **Li Yuan, Acting Professor and Representative Chair for East Asian Business and Economic Studies at IN-EAST and Mercator School of Management at the University of Duisburg-Essen**. First Aasim sounded off China-supported investments in Pakistan aimed at developing both the maritime and rail leg in order to bring closer the Far East-South Asia-Central Eastern Africa triangle. As such, Aasim continued, Pakistan now experiences a rapid investment period with heavy chunks of money injected into the country's seaports (from 50 to 120 new berths) and railways (particularly on the North-South corridor to link the Central Asia landlocked countries with the Middle East and Africa). Aasim admitted that already today, thanks to these investments, the logistics performance of Pakistan has gone up remarkably. Asked about infrastructural bottlenecks, Thomas replied that paradoxically Europe is the biggest troublemaker. China has efficient terminals and liner infrastructure that makes it possible for train sets to travel at a speed of 120 km/h; there are also no problems with the China-Russia border crossing. On the other hand, red tape issues – arising from the plethora of actors, authorities, customs, and the lack of single cross-border e-documentation – are stealing efficiency in Europe. Anna agreed with Thomas on the benefits e-documents would bring about, and also pointed to the need of increasing trains' speed in Europe. There's a clear drive for change coming from China's side on improving rail performance in our corner of the world. But despite these setbacks, Thomas said, the future looks bright for rail shipments over the Eurasian Land Bridge, following

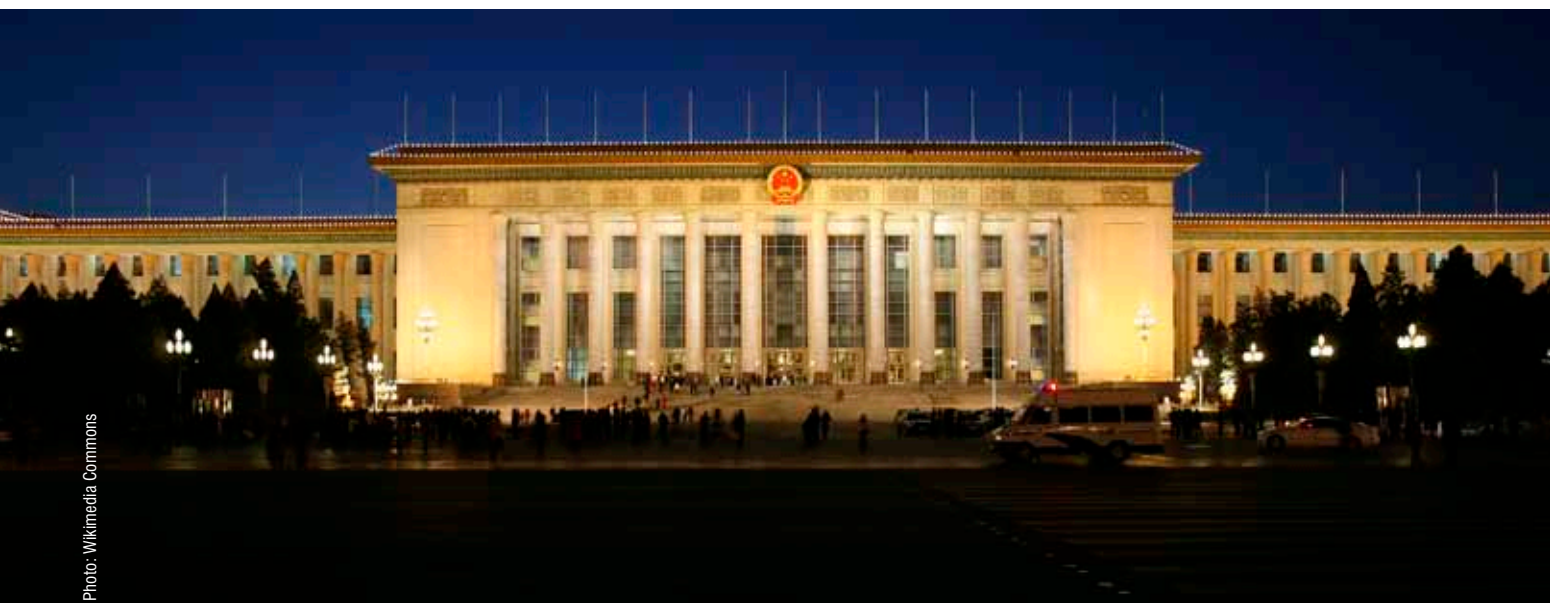


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among others opening Europe's market to Chinese cars, as well as thanks to deepening intergovernmental and business relations between these two powerhouses of the global economy. In the end, a sustainable import-export-balanced service portfolio (without subsidies) will find its place on the market, serving new industrial and economic zones. Professor Yuan summed up the discussion in a very positive tone by telling us that there's much more potential for trade yet to be unlocked.

Connectivity

Without a shadow of doubt, the current geopolitical atmosphere is becoming more and more strained. In defiance of this, the transport and logistics business demands better connectivity and more cooperation, bridging thousands-of-kilometres-long gaps for mutual benefits. Should the sector avoid being bulldozed into a crisis plotted out of the blue in the heads of politicians, then we can turn off TV news with talking heads being sore about this and that, ensuring that our containers are safe and sound somewhere in Asia on their way to Changchun or Duisburg. ■





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Harbours 360 Conference
8–9.11.2016

Wyndham Duisburger Hof Hotel
Opernplatz 2
47051 Duisburg
Germany



We all speak logistics

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Multimodal transport
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Day 2

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Multimodal transport in Europe
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09.00–09.30

Registration and welcome coffee

09.30–10.35

Official addresses and keynote speeches

Conference moderator:

Alan Arent, Event Director, Actia Forum

- Erich Staake, President, Port of Duisburg
- Alexander Van Den Bosch, Director, European Federation on Inland Ports

Keynote speeches

The future of supply chain. From factories to wardrobes

- Przemysław Myszka, Editor-in-Chief, Harbours Review

TEN-T policy for inland waterways transportation and ports – EC's vision and current status

- Daniela Rosca, Head of Unit, European Commission

10.35–11.00

Coffee Break

11.00–12.00

Session: Win-win cooperation between seaports and their inland partners

Sea and inland ports – cooperation and synergies

- Axel Mattern, CEO, Port of Hamburg Marketing

Ports and terminal alliances – HAROPA (Ports of Le Havre, Rouen and Paris) case study

- Imad Dridi, Head of Strategy Unit, Haropa Ports

Ports in the middle of mountains – From Switzerland to Germany

- Alexander Van den Bosch, Director, European Federation of Inland Ports

Discussion with session guests

12.00–13.00

Lunch Break

13.00–13.45

Session: Multimodal services expansion – development of the supply chain

Road transportation on the multimodal landscape

- Karl-Martin Studener, Business Director, IVECO

Driving change for business – delivering goods door-to-door by road

- Kajetan Jagłowski, Sea Freight Forwarding Director, PEKAES

Georgian Railway as an important players in OBOR initiative

- Mamuka Baktadze, CEO, Georgian Railway

13.45–14.45

Discussion panel:

Towards truly multimodal EU corridors

Panel moderators:

Przemysław Myszka, Editor-in-Chief, Harbours Review

- Axel Mattern, CEO, Port of Hamburg
- Elmar Ockenfels, Representative, Port of Antwerp
- Lina Konstantinopoulou, Head of Department of Logistics and Transport, ERTICO
- Laurent Vanden Broeck, Logistics and Mobility, Port of Brussels

14.45–16.15

Explore Duisport by bus – study tour

Day 2 / Wednesday / 9.11.2016

Connecting Asia and Europe – by sea or land?

09.00–09.30

Registration and welcome coffee

09.30–10.30

Official addresses and keynote speeches

- Alan Arent, Event Director, Actia Forum

New Silk Road, connecting Europe (Duisburg) with Central Asia, and with China

- Karl Gheysen, CEO, „KTZE – Khorgos Gateway” LLP, Kazakhstan Railways Group

Intermodal business from the perspective of a private/state block train operator

- Roland Hawranek, Director Business Development Logistics and Network, Changchun International Land Port

10.30–11.00

Coffee break

11.00–12.00

Session: New Silk Road's routing map – who, where and how?

Intercontinental services from rail operator perspective

- Thomas Kargl, CEO, Far East Land Bridge

Is Poland a connecting gate for Europe and China?

- Anna Różalska, Business Development Manager, PKP Cargo Connect

Discussion with session guests

12.00–13.00

Lunch Break

13.00–13.30

Session: Bridging Europe with Asia

Railroad network from Baltics to Asia

- Stephen Archer, CEO, Baltic Rail AS

13.30–14.30

Discussion panel: Bridging Europe with Asia

Infrastructure development on the route.

Cooperation between public authorities and companies on the route.

Asian-European business cooperation.

Panel moderator:

Prof. Li Yuan, Acting Professor for Business and Economic Studies of East Asia, Institute of East Asian Studies and Mercator School of Management

- Aasim Siddiqui, All Pakistan Shipping Association (APSA)
- Anna Różalska, Business Development Manager, PKP Cargo Connect
- Thomas Kargl, CEO, Far East Land Bridge

14.30–14.45

Summary and end of the conference

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The Harbours Review is a European magazine of the Baltic Press publishing house, with a quarterly e-zine with expert views on the most important issues for Europe's port sector, as well as a completely free on-line European ports database. Baltic Press set out in 2004 and from that time delivers credible information and professional market analysis (like year-book publications: ro-ro & ferry, container, bulk, Baltic ports). We enhance business among partners within the region and promote European companies throughout the world.



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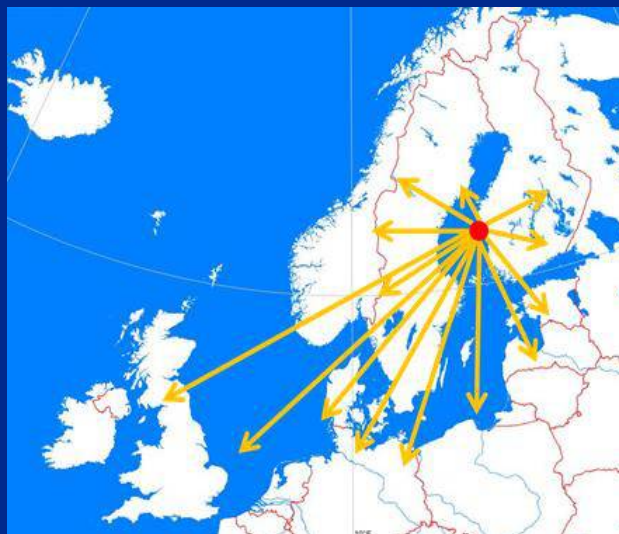
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