

# Luka Koper

Supporting increased competitiveness of  
transport and logistics in the Region

Portorož, 26.1.2015

# Opportunities for regional development

## European documents:

### Macro-region strategy:

- Danube macro-region strategy
- Adriatic – Ionian macro-region strategy
- Alpine region strategy

### Corridors' Work Plan:

- Baltic – Adriatic / RF5
- Mediterranean / RF6

## Possible topics:

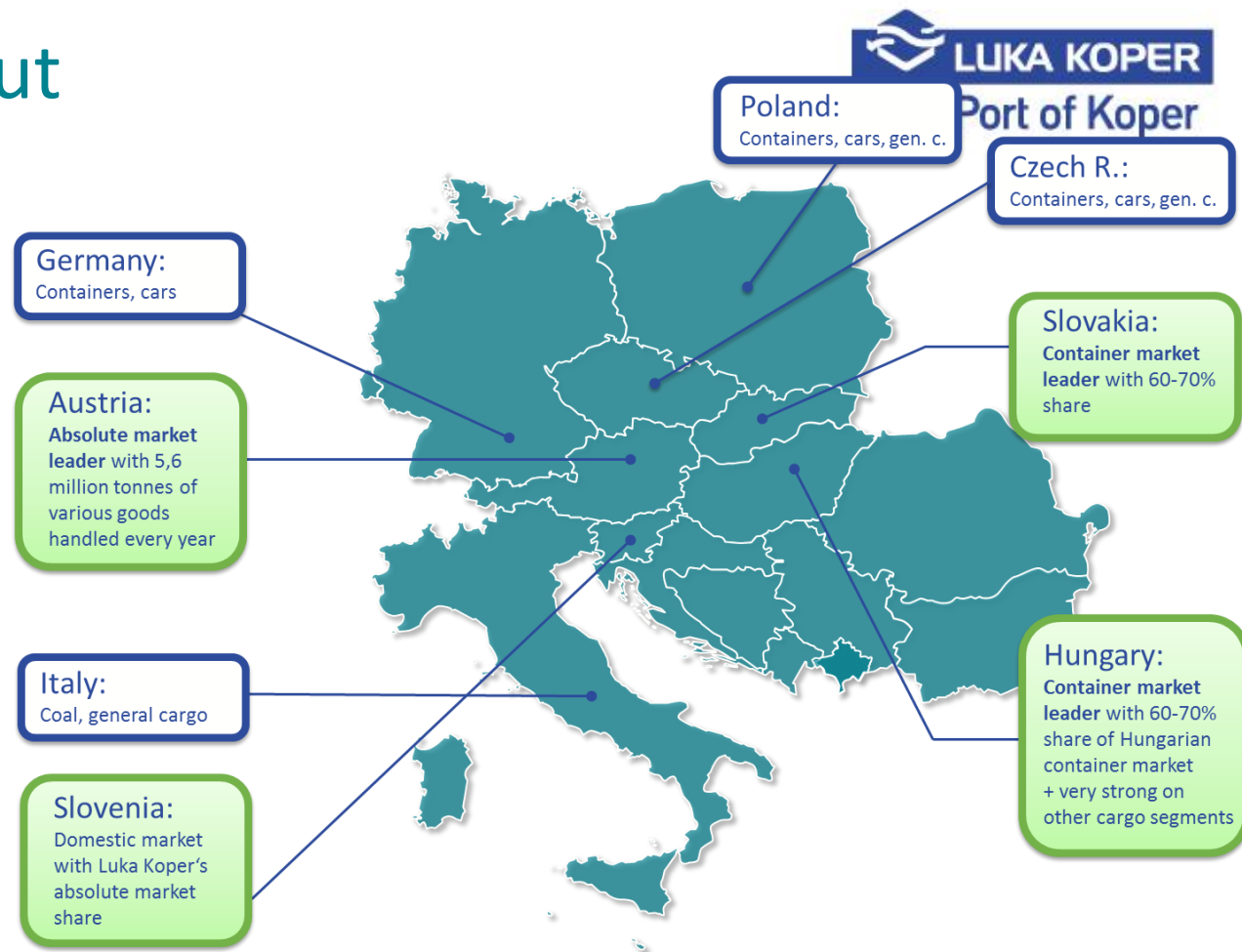
- safety, environment, energy efficiency & alternative fuels, innovation & technology, infrastructure development of each port capacities + connection to hinterland + promotion (**commercially neutral concept – free competition!**)

## Experience:

- EU projects & cofinancing;
- NAPA

# Port throughput markets in 2014

- The port is very international oriented – **exporting services**
- More than **70% of cargo is transported in transit** – need for reliability and availability of capacities on infrastructure connecting to hinterland markets

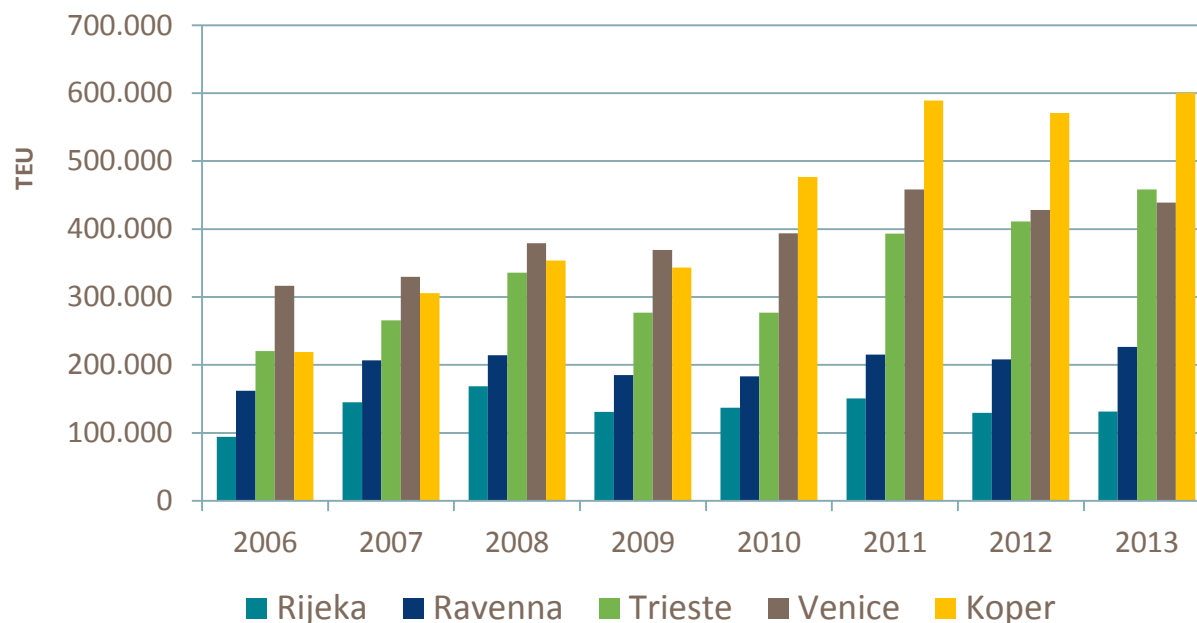


In the last years the vision and strategic orientations are successfully accomplished / the port is becoming the **leading port system for the target markets of Central and East Europe** :

- First port for Austria in the total throughput
- First port of Hungary and Slovakia for container traffics
- Second port in Mediterranean (and first on the southern route for our markets) for new vehicles
- Leading port on the southern route from/to Central and Southeast Europe also for specific cargo groups: timber, livestock, coal, iron ore, steel products, soya, alumina etc.

# Positioning vis-a-vis coopetition

## Container traffics in North Adriatic



- In the most competitive segment (containers) the position of Koper is:
  - In the period 2007 – 2013 the traffics are **almost double**
  - In 2010 the **leading role** was achieved
  - Till 2013 the market share increased to **32% of total traffics**
- Such **position** is necessary to keep and **strengthen**

N. Adriatic	TEU v 2007	% v 2007	TEU v 2013	% v 2013	Growth index
Koper	305.648	24%	600.441	32%	196
Rijeka	145.040	12%	169.943	9%	117
Trieste	265.863	21%	458.000	24%	172
Venice	329.512	26%	446.591	23%	136
Ravenna	206.786	17%	226.879	12%	110
Total	1.252.849	100%	1.901.854	100%	152

**North Adriatic region:**  
 Stimulating port's growth for additional capacities and smooth hinterland connections!



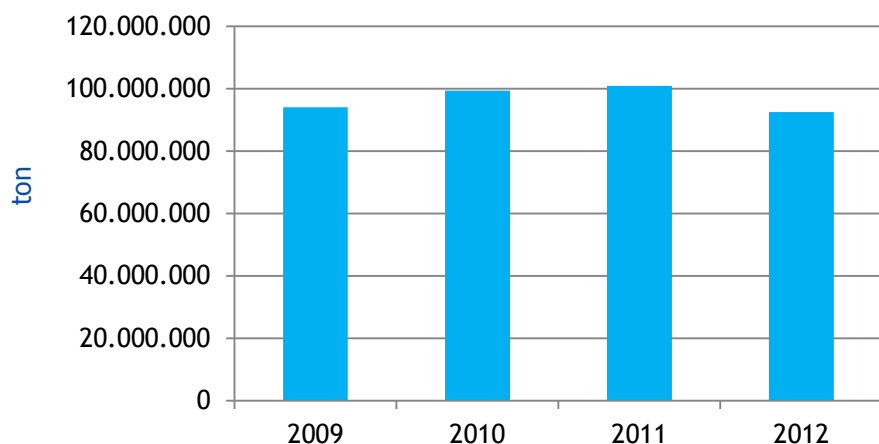
**NAPA**  
North Adriatic Ports Association

# European benchmark

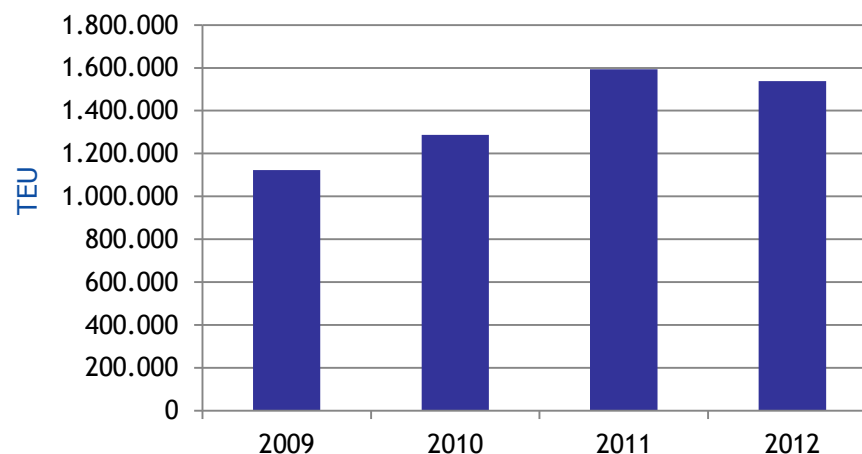


	Total throughput in million tonnes (2013)	Container throughput in million TEU (2013)
Rotterdam	441.5	11.7
Antwerp	184.1	8.6
Hamburg	130.9	8.9
<b>NAPA ports</b>	<b>107.0</b>	<b>1.7</b>
Marseille	85.8	1.1
Bremen	84.0	6.1
Zeebrugge	43.5	1.9

Total throughput of NAPA ports in tonnes



Container throughput of NAPA ports in TEU



# Strengthening a competitive transport system (via Slovenia)

- In the crossroad of *Baltic-Adriatic* and *Mediterranean* corridor + core EU port
- Urgent development of competitive transport solutions to the hinterland markets via Slovenian infrastructure (**main corridor** / reliability, efficiency, long-term orientation)

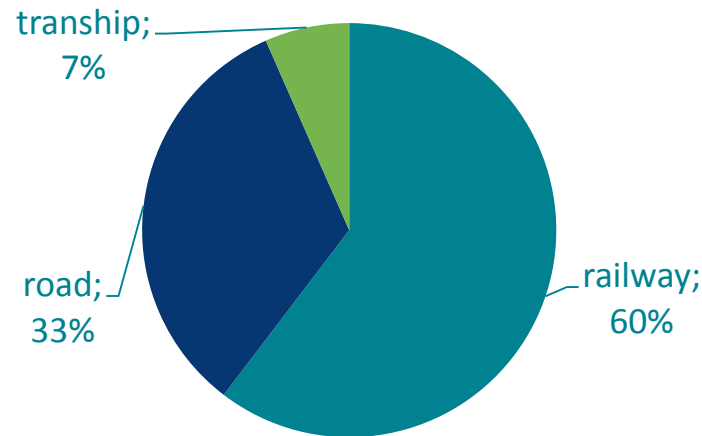


Key production and consumption  
hinterland markets can be reached in:

- 1 day by road
- 2 days by train

# Needs for railway transport services

- Modal split: 60% railway – used mainly by cargo in transit (for foreign customers / regional importance)

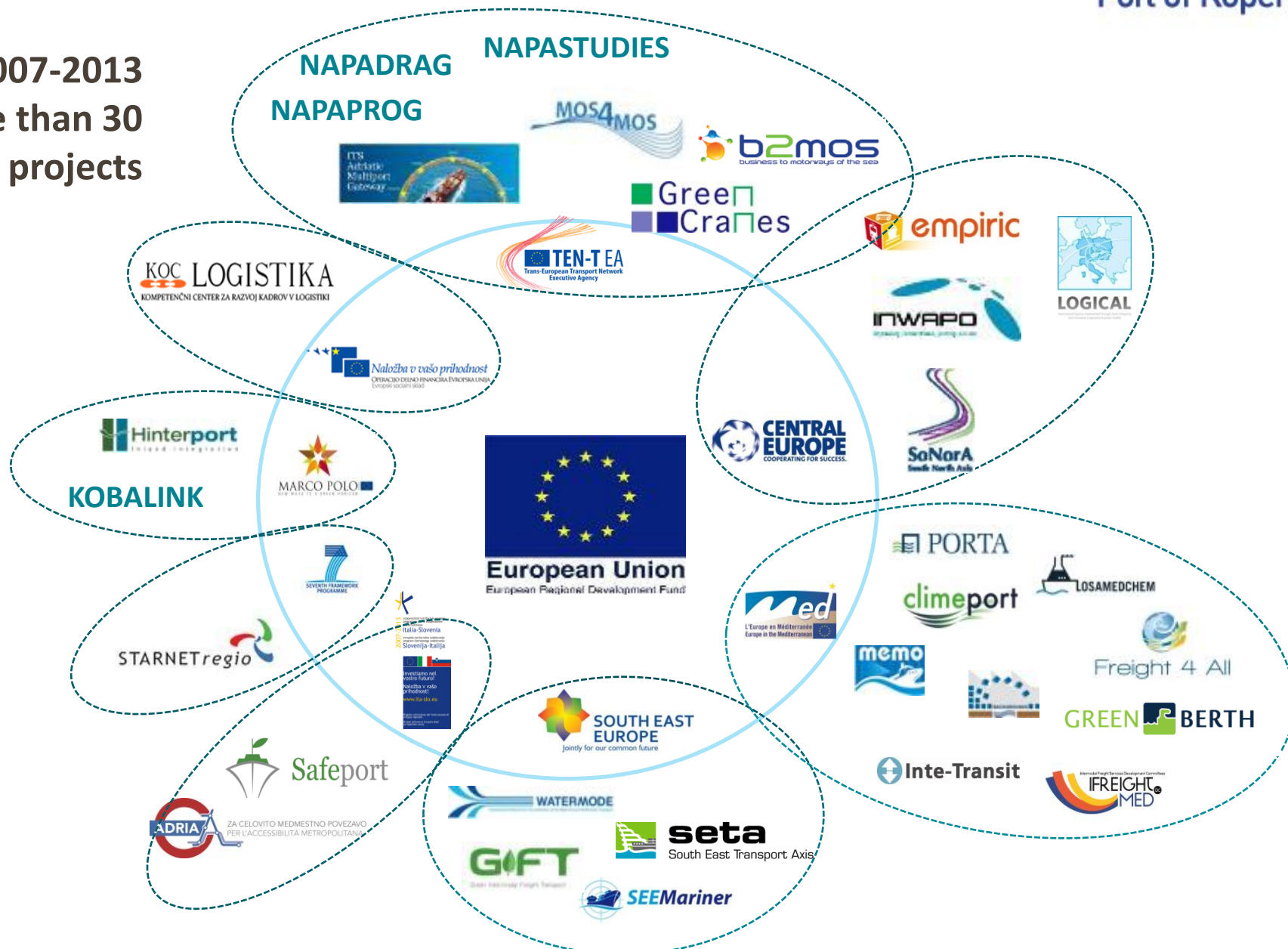


- Average nr. of trains/day today: **60**
- Needs for more trains/day already today: minimum **65** (additional customers' needs and optimal logistics) => modernization on-going
- Expected needs for trains/day till 2020: **+35% trains** (approx. **85** train/day).

# Active on EU initiatives / projects

2007-2013

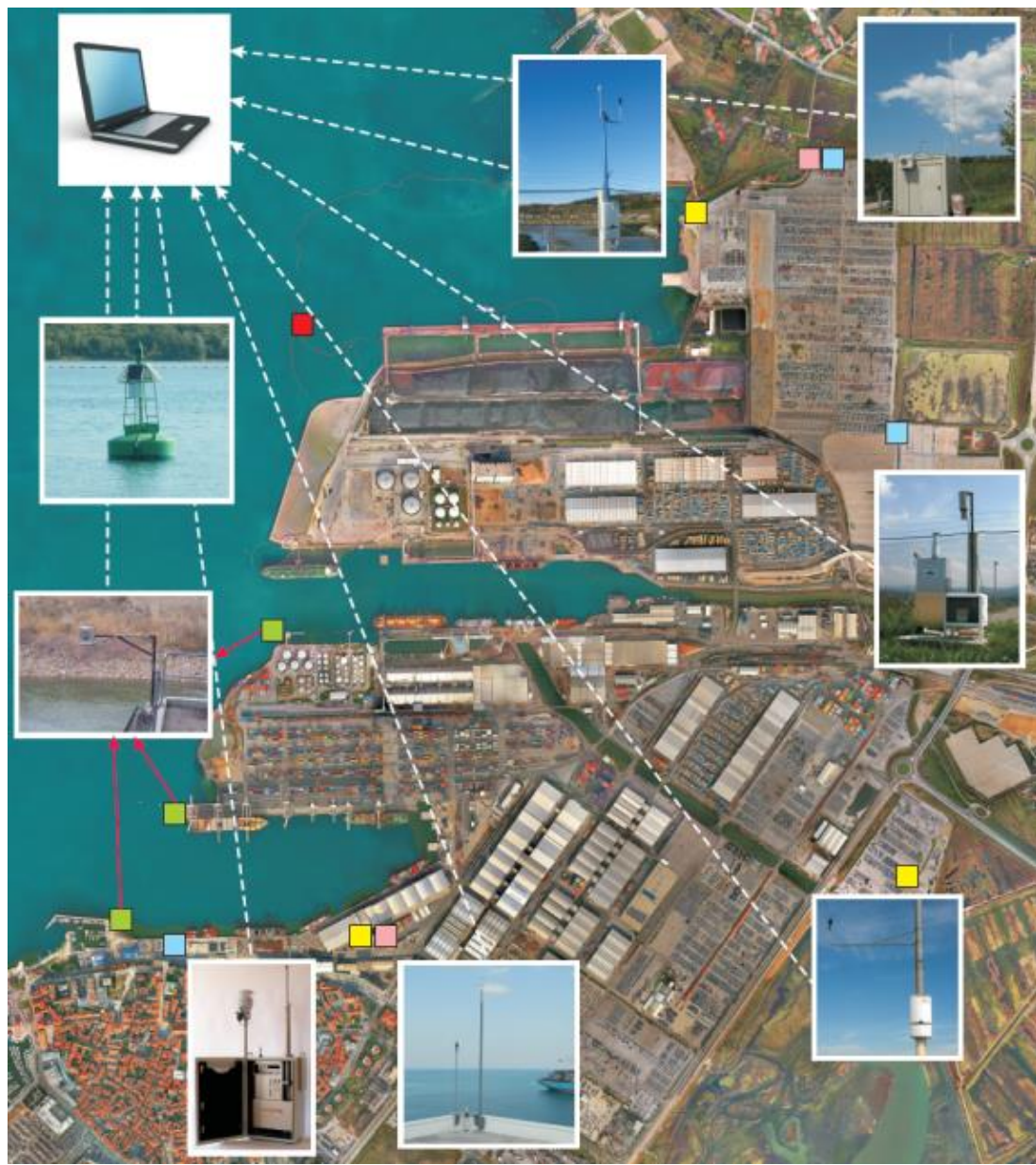
More than 30 projects

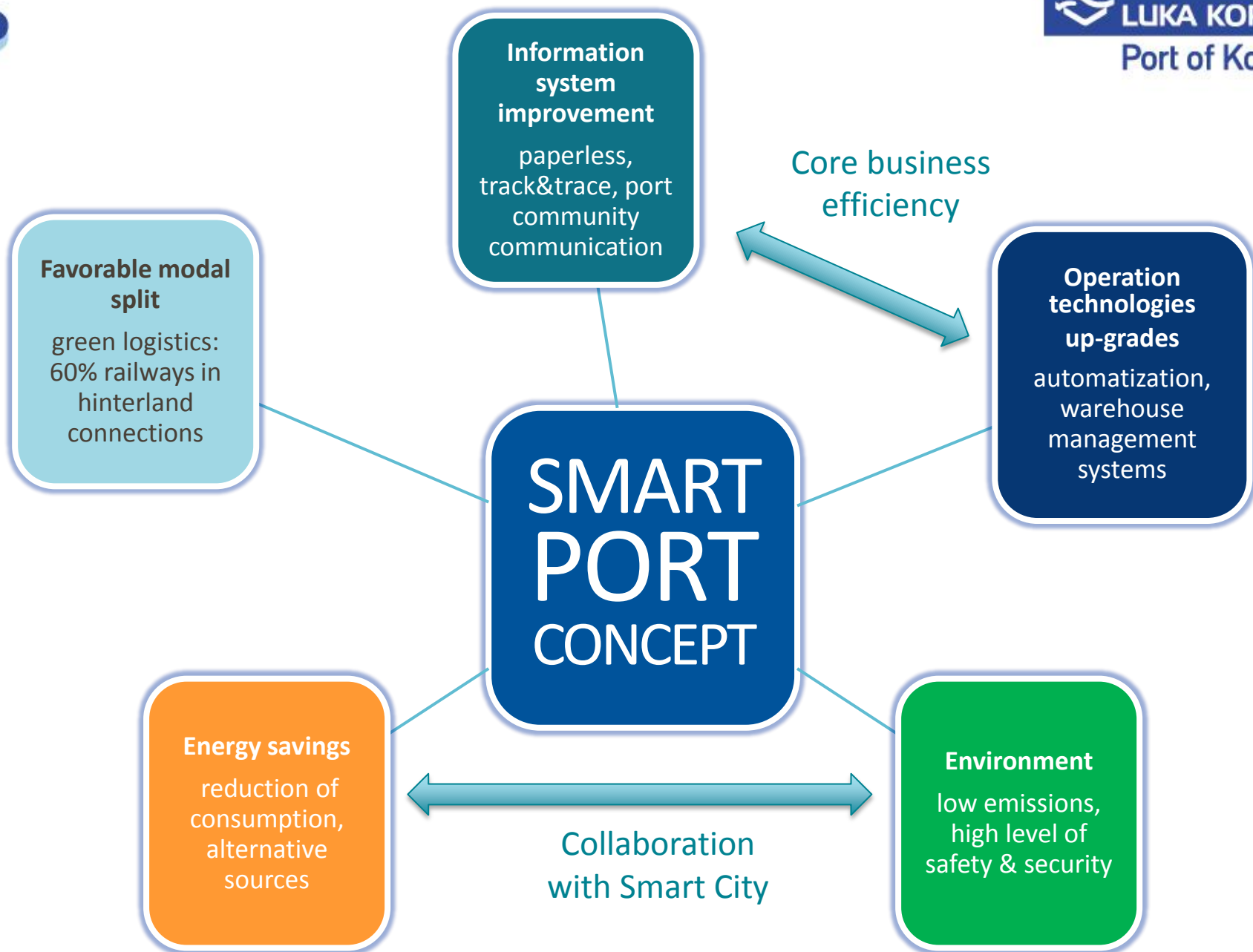




# Regular awareness for environment and safety

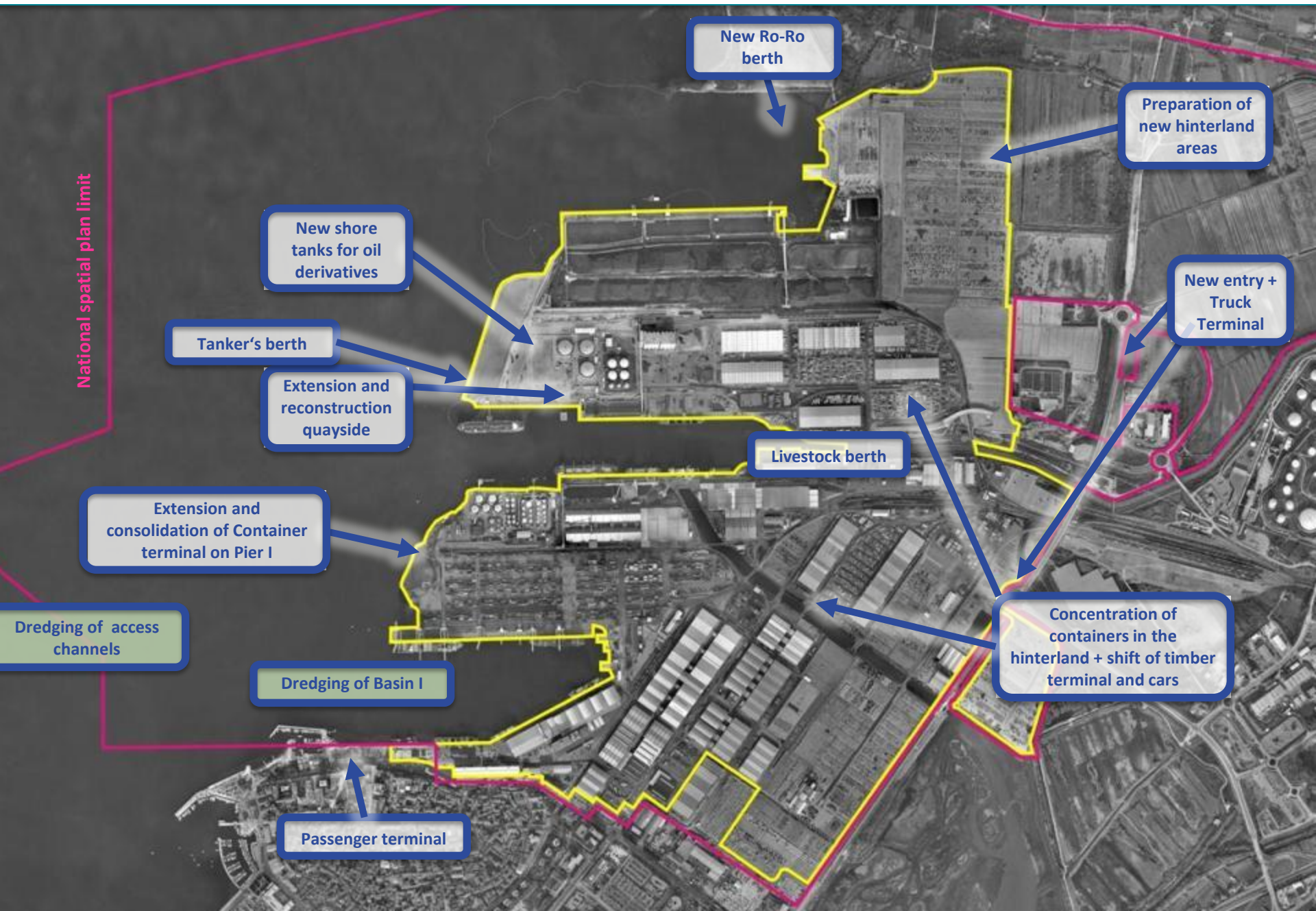
- Certificates:
  - ISO 14000
  - EMAS
  - OHSAS 18001
- Regular on-line monitoring to prevent and avoid reduction of negative impacts on:
  - Sea quality
  - Dust emissions PM10
  - Noise
- Waste management
- National Spatial plan / long-term solution with sustainable development
- ESPO award 2014
- <http://www.zivetispristaniscem.si/> / [video](#)







# Port development till 2020



# Key projects within the port till 2020

- Maximum possible extension of Pier I and arrangement of existing quay.
- Berthing facilities:
  - Basin II: arrangement of the Southern side of Pier II + tankers + livestock
  - Basin III: Ro-Ro and beginning of Pier III
- Re-organization of internal connecting infrastructure and transport links according new entries and truck terminal
- New warehousing facilities: tanks, classic warehouses
- Port extension towards hinterland (land fills + natural resorts areas)
- Passenger terminal infrastructure and building

*Total estimated value **approx. 200 mio €** (additionally investment also in equipment)*

**Opportunities for EU funding of infrastructure 2014 – 2020 (CEF) – already active / NAPA**

**Regional development and innovation opportunities:**

- Territorial cooperation - **announced for 2015**: Central Europe, MED
- Horizon 2020 – **already active**

# Needs for additional capacities

## Public infrastructure:

- Railway infrastructure:
  - Till 2020 it is expected that **65%** traffics will be related to railway support
  - Urgent speed-up for the construction of: **2<sup>nd</sup> railway track Koper – Divača**
  - Urgent parallel activities for removal of bottlenecks (organizational, technical and infrastructural), which are on the transport route till the Austrian and Hungarian border
- Road access / new entries with the related truck terminal
  - Bertoki accessing link (urgent and immediate solution)
  - Sermin accessing link (NSP solution! / missing link from the motorway)
- Provision of suitable drafts on the maritime side / trend of bigger vessels

# Continuation and future activities within NAPA

## EU projects and cofinancing:

- **TEN-T / CEF:**
  - ITS Multiport Adriatic gateway / ICT platform
  - NAPADRAG / dredging activities in Venice and Koper
  - NAPAPROG / project design Pier I extension
  - NAPASTUDIES / project design of different port infrastructure up-grades
  - NAPA4CORE / 26.2.2015 / MOU signed
  - NAPA4MOS / 26.2.2015 / MOU signed
- **Territorial cooperation:** SAFEPORT, ADRIA A, EMPIRIC, INWAPO, GREENBERTHS etc.
- **New proposals:**
  - studies on adaptation of port infrastructure on new port regulation s(especially electrification; alternative energy sources as LNG etc.) + concrete project design
  - studies on how to adapt the TEN-T core network considering Croatian membership in EU (X. Pan-European corridor)
  - Non-commercial issues: environment, security, energy, infrastructure development etc.

## Meeting new EU regulations:

- Studies within EU projects in order to gain their validity / Port regulation / State aid / Concessions / Social dialogue

## Promotion of North Adriatic ports' region:

- Marketing: selecting **locations over Suez Canal** and promoting ports' infrastructure capacities, connections with the hinterland
- Institutional promotion: **balancing European logistics**

**Lean common administrative activities!**

Thank you for the attention!



[www.luka-kp.si](http://www.luka-kp.si)