

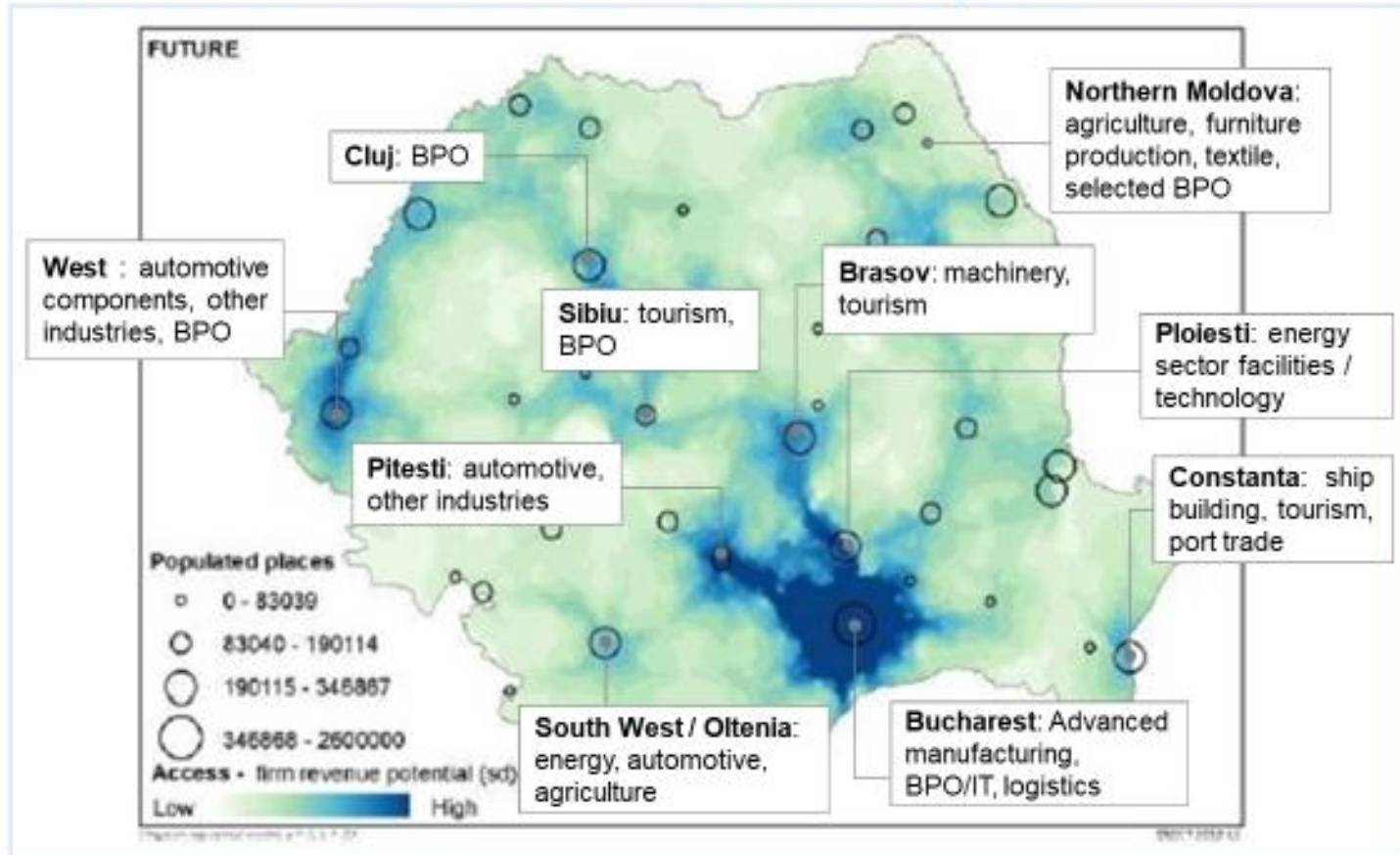


CONSTANȚA DANUBE-BLACK SEA ECONOMIC OPPORTUNITIES FORUM

28 SEPTEMBRIE 2018

CLUSTERS

INITIAL HYPOTHESES : Focus on strengthening existing clusters and created a few selected new ones based on strategic bets



SOURCE: World Bank

Transformation flagships: Developing corridor strategy using the Port of Constanta as an integrated gateway to Central and Eastern Europe

Potential impact

Current context / potential

- Constanta is the **largest port in the Black Sea**, boasting a range of facilities for offshore services (deep berths, docks, warehousing space, adequate logistics connections)
- Using the port to route cargo from the Far East is **the logical and efficient transportation route between Asia and CEE**

Examples of measures to support development

- **Extension of Constanta port** through construction of new berths, rail and road connections and dedicated logistics zone (industrial park)
- **Regional cooperation in developing a corridor strategy**
- Creation of efficient **inter-modal terminals**
- **Promoting the port** as a regional logistics hub
- **Improvement of administrative processes**

+180k jobs

+10bn GDP

+€1.6bn tax income



Opportunity to develop (maritim) manufacturing integrated into logistics zone



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Regiuni de dezvoltare România



Macro regione Polonia de Sud

The Development Strategy of Southern Poland until 2020 in the light of programming documents related to development policy



One Belt, one road - China's new Silk Road



D1 Case example: Hamburg managed to capture Central Europe hinterland potential with a coherent container strategy

Context and strategic goals

- Opening of Eastern Europe in early 1990s offered great hinterland potential for West European ports
- Hamburg quickly realized its strategic location versus the Central and East European hinterland against other ports in Hamburg – Le Havre range
- Port ambition was to become the main and preferred partner of those emerging market opportunities

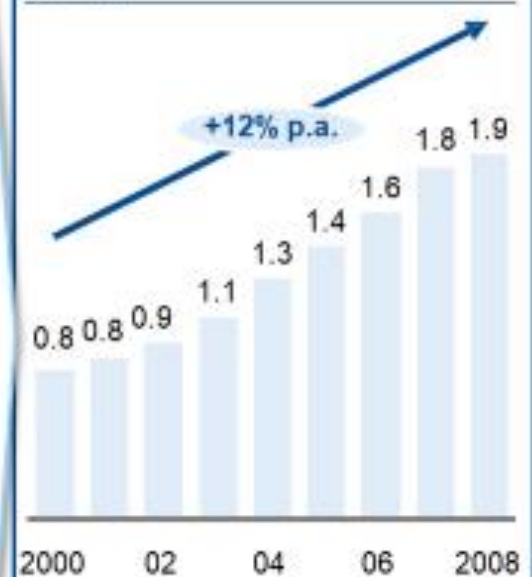
Steps to success

- Development of fast, frequent and cheap container network and intermodal connections
 - The Hamburg port leveraged the "Hafenbahn" train company it owned
 - Investments in state of the art marshalling and container yard at Maschen, south of Hamburg
 - Investments into terminals across the network



Effects

Hamburg intermodal traffic TEU mn



Key learning: A coherent investment strategy in container services helped the Hamburg port in capturing new hinterland potential

D1 Case example: Rotterdam invested heavily in improving inter-modal connectivity and infrastructure

Initiatives to enhance connectivity

- Dedicated passage way for railway cargo which links to harbor (Betuwelijn, from Rotterdam to Germany, at a cost of about €4.5 billion)
- Underground passage (e.g. underground passage between Schiphol and flower auction center and Eindhoven)
- Vans are used for urban distribution system and linked to intercity trucking net

Rotterdam is fully connected with the European highway network. A15 European expressway cuts across the entire port area

Dedicated passage way for railway cargo enables Rotterdam to link to about 30 destinations in continental Europe



Inland intermodal transport hub, whose railway service center provides rapid handling of containerized cargo trains

Sophisticated inland water systems is one of Rotterdam's advantages. 25% of the cargo volume is transported via inland waterway

2 Situation: Inefficient handling decreases Constanta's attractiveness

Gateway direct cost for the delivery of T-shirts from Shenzhen to Vienna
 € per container



Key drivers
 increases

Proximity and transported volumes

Labor cost & regulations, existing processes

Import customs broker fees, customs clearance charges, relevant documentation fees

Means of transportation (rail or truck), proximity, gasoline cost, transportation regulation

1 Origin cost includes origin port handling cost and customs cost

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documentation fees

processes

charges, relevant

transportation regulation