

Resumé fra Special Session

ROUTES TO A GREEN TRANSPORT CORRIDOR ÖRESUND-HAMBURG

Routes to a green transport corridor Öresund – Hamburg

Leif Gjesing Hansen, Senior Adviser and project manager, Region Zealand.

Leif Gjesing Hansen introduced the scope of the Green STRING Corridor project and the framework of the analysis to be presented.

The transport and logistics industry in the STRING Region – a new North European Logistics Hub?

Göran Serin, Associate Professor and Markus Holzweber, Assistant Professor, Roskilde University.

Göran Serin and Marcus Holzweber presented results from a new analysis on the transport and logistics industry in the STRING Region. The analysis is part of the activities organized within the Green STRING Corridor project. Serin and Holzweber documented in their study that the transport and logistics industry in the STRING Region employs approximately 180.000 people distributed on a number of sub-branches. A strong point in their study is the documentation of how different sub-branches, within the transport and logistics industry, develop differently in the different areas of the STRING region.

In Region Zealand the haulage sector dominates the total number of firms and employment. But at the same time this sector is one of the sub-sectors suffering the greatest overall loss of jobs within the transport and logistics industry since the late 1990's. However, even the overall picture of the transport and logistics industry illustrates a decreasing number of employees, the turnover in many of the sub-sectors has been increasing and for some sub-sectors even the number of employees has been increasing - e.g. in logistics services like warehousing, third party logistics, postal and courier services.

The sub-sector displaying the greatest turnover is, without competition, the maritime sector. In the Capital Region of Denmark, it accounted for approximately 18 billion euro in 2010, while it in Hamburg accounted for approximately 15 billion euro. Interestingly, while the maritime industry in Hamburg accounted for approximately 14.000 employed, it only amounted to approximately 3.000 people in the Capital Region of Denmark. This clearly illustrates that, apart from location of headquarters and administration, the maritime activities of the Capital Region of Denmark are taking place on the global markets.

Many other interesting results about the structure and size of the transport and logistics industry in the STRING Region can be read in the study by Serin and Holzweber. One perspective is the challenge of describing the role and function of the transport and logistics industry in connection with the performance and competitiveness for other industries. Using the traditional statistical categories does not fully represent the size and structure of the logistical activities, as also Serin and Holzweber note in their study. So it has not been possible within this study to include related activities from for example retailing and distribution - a major activity especially in the Öresund Region. In a forthcoming study by Roskilde University, within the Green STRING Corridor project, it is intended to find examples of industrial clusters where transport and logistics play a key-role for the performance. Examples of these industrial clusters in the STRING Region are the Swedish paper industry and its transport flows via ports in Southern Sweden and Northern Germany, the automobile import hub in Malmö Port or the retailing clusters west of Copenhagen.

Greener transport and Logistics solutions – examples of more efficient transport and logistics solutions in selected companies

Sandrina Lohse, Consultant and Work Package Leader, Region Zealand.

Sandrina Lohse presented the scope and results from a recent study in the Green STRING Corridor project, conducted by Oxford Research Consultants. In the study, three transport buyers and three transport forwarders in the STRING region have been used as examples on how to promote and highlight the potential of innovative transport and logistics solutions in a future green transport corridor between the Öresund Region and Hamburg. At a more concrete level, the study demonstrates the link between business and environment, a link which is supported by efficient transport solutions.

Transport buyers increasingly demand cheap, reliable and increasingly innovative solutions. As of now, it is generally only larger transport forwarders that are able to adopt and implement these new solutions due primarily to financial resources, access to technology, and know how. Transport buyers can trigger implementation of innovation but ultimately the transport operator alone carries the risk of investment.

Sandrina Lohse presented possible reasons for adopting greener transport solutions, which can vary and be highly context-dependent both for transport provider and buyer. The results shows various drivers for change and identifies key barriers that these companies need to overcome when adopting or implementing greener solutions. Relevant questions for the study include the role of facilitators in decision-making impact and the role authorities have had in these processes.

The study by Oxford Research included case studies of the following six firms:

- Carlsberg Breweries (DK)
- JH Transport (DK)
- COOP (S)
- Plyms Åkeri (S)
- European Cargo Logistics (D)
- GST Worldwide Logistics (D)

Business travel and accessibility in the STRING Region – time gains and regional economic effects of faster train connections.

Leif Gjelsing Hansen, Senior Adviser and project manager, Region Zealand.

Leif Gjelsing Hansen presented the results from a study on how an improved railway connection Öresund-Hamburg potentially will affect the accessibility and labour market in the STRING Region.

The study was carried out by a major Swedish consultant company Vectura AB, who previously has done studies in the corridor. This study is the first covering all 3 countries – Sweden, Denmark and Germany. Vectura examined two different service alternatives: An interregional service, serving all the major cities in the corridor from Hamburg to Copenhagen and an ICE express train serving Hamburg, Lübeck, Copenhagen, Copenhagen Airport and further on to Malmö. This is similar to the direct service Hamburg/Berlin or the so-called "Lyntog" in Denmark. The interregional service is similar to the current "Öresundståg" between Copenhagen and the Southern Sweden.

Vectura analysed the different service alternatives in combination with 3 alternatives for the quality standards of the infrastructure, when the fixed link across Fehmarn is completed in 2021.

In the best alternative, based on double track in the whole corridor and a new bridge across the Storeström, the travel time between Hamburg and Copenhagen would be 3:05h for the interregional service calling at all major cities and 2:15h for an ICE express service. This means Copenhagen airport can be reached in 2:40h from Hamburg and Malmö within 3 hours.

For the airport this means an increased catchment area for potential customers, for the citizens and business-life of Hamburg and Schleswig-Holstein it means improved global accessibility having one more airport to choose for overseas flights. The cities in the corridor between Hamburg and Copenhagen/Malmö will experience a dramatic increase in accessibility. Suddenly they will be connected not just to one, but to two large metropolitan areas within few hours of travel, both by road and by rail.

Debate and questions of the presentations

Michael Henriques of Incentive found the session interesting:

"I think it's very important to consider the freight and logistics perspective to the fixed link across the Fehmarn Belt. I am, though, a little sceptical defining it narrowly as a freight corridor. I think it's important to consider the flow in broad terms as logistics. No doubt about it - the corridor is a very important transit corridor. But how do you utilize the corridor more? I'm rather nervous about how we are going to actually use all that transport? It's a tricky task - as seen before. Of course the key is to reload, expand with added services - to add value to put it simple. You don't have to be an Einstein to load and drive a truck from Gothenburg to Hamburg. But you do need to be a bit of an Einstein to increase the value from that trip."

Mads Holm-Petersen, the Danish Road Authority, also found the discussion important and commented on the Green STRING Corridor's tentative findings on the impact of the fixed link on the labour market: "Personally I find it difficult to see much potential in a joint Danish-German labour market as of now. Already there is a labour surplus on both sides of the border. And both the German and Danish parts of the Fehmarn Belt are peripheral regions. Even in the south of Jutland it has been difficult to manage a joint labour market with their German neighbours - and they even have a long tradition for cross border cooperation and a historical orientation against German language and culture. "

Mads Holm-Petersen also commented on the potential of developing more environmentally sustainable transportation: "It's very interesting to see how the "green" aspect can be utilised and optimised. But a truck does not in its own right become green from driving through a tunnel. The corridor should be used to actively support and optimise "going green". The corridor could be a sort of test lab over three national borders for trying out sustainable technologies in full scale. I'm just afraid it will take rather a long time to get there. No one has decided on the alternative fuel source of the future yet."

Sandrina Lohse, Work Package Leader, could in fact show that there are already examples for existing 'green' transport solutions. Yet she also pointed out that development and changes request certain facilitators, drivers and that each individual company needs to overcome various barriers. The Work Package Leader stressed that public authorities need to send strong signals about the direction of change by setting standards and maintain consistency to minimize the risks - hereby allowing for long term investments. But all participants seem to agree on one aspect: The industry and the public authorities both have to be better at creating strong linkages between companies by connecting buyers to suppliers of green transport services.