



MITIGATING THE EFFECTS OF EMERGENCIES IN BALTIC SEA REGION PORTS 2016–2019

Baltic Sea Region Transport and Logistics 2030 Foresight Study

HAZARD Final Conference

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BSR Transport and Logistics 2030 Foresight Study

- What is the outlook of transport and logistics in the Baltic Sea Region (BSR) in 2030?
- The study was conducted in two rounds in late 2018 and early 2019



Map: Interreg Baltic Sea Region

15 March 2019

A follow up to a study conducted in 2013*

- **The 2013 foresight study was set at year 2025**
- **Only slight adjustments to the setting in the current study**
 - 10 new questions and one removed in the questionnaire
 - 97 expert respondents from all BSR countries except Belarus
 - 34 respondents of these took part also in 2013

*) Ojala, L. – Kersten, W. – Lorentz, H. (2013) Transport and Logistics Developments in the Baltic Sea Region until 2025. *Journal of East-West Business*, Vol. 19, 16–32.

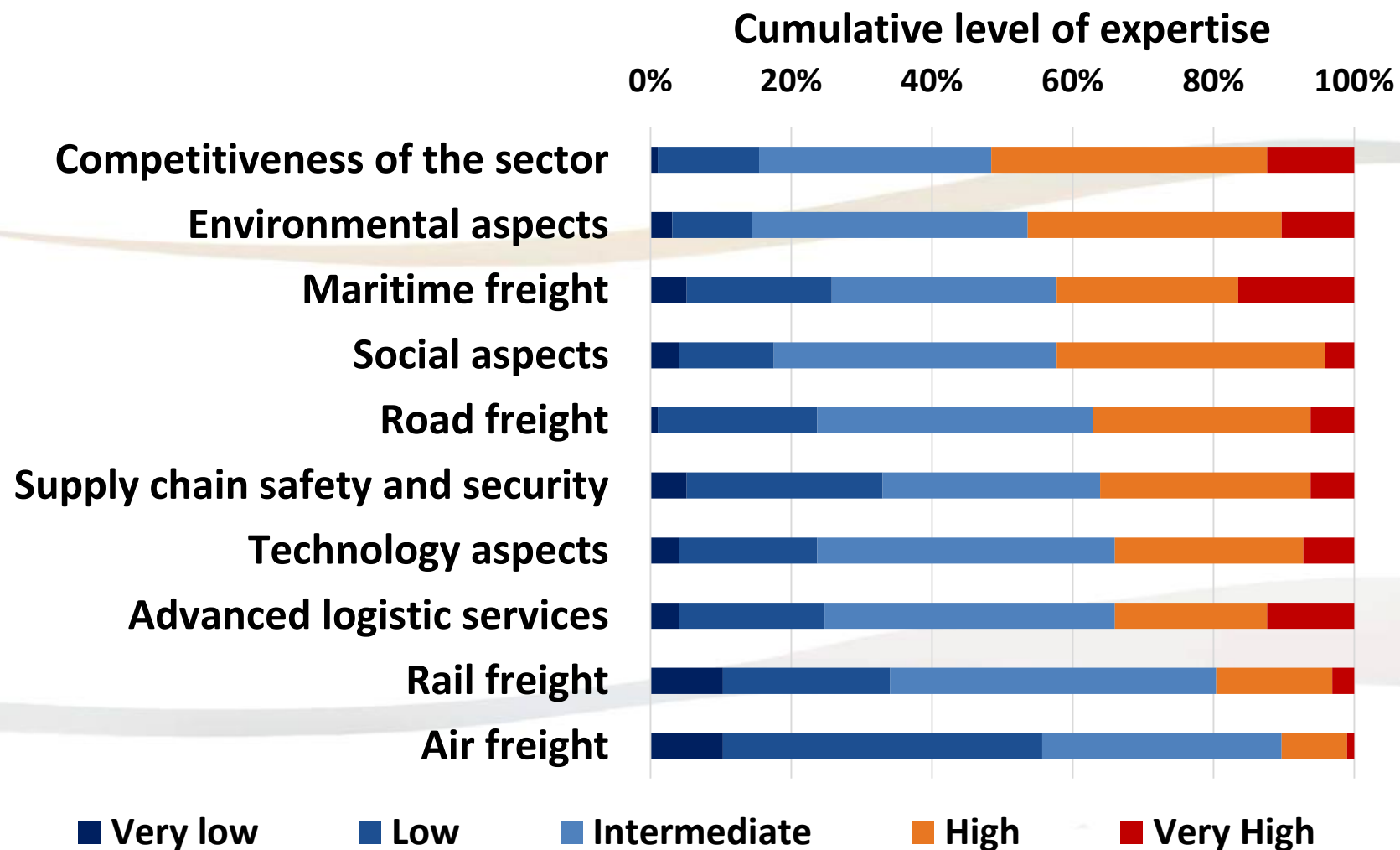
Survey Structure

- **52 Questions in 10 Themes**
- **Expert panel**
 - **Over 2/3 Academic***
 - **The rest: Government, Corporate, Industry Association, Other**
 - **Participants from all BSR countries excluding Belarus**

*) Doctoral level or higher

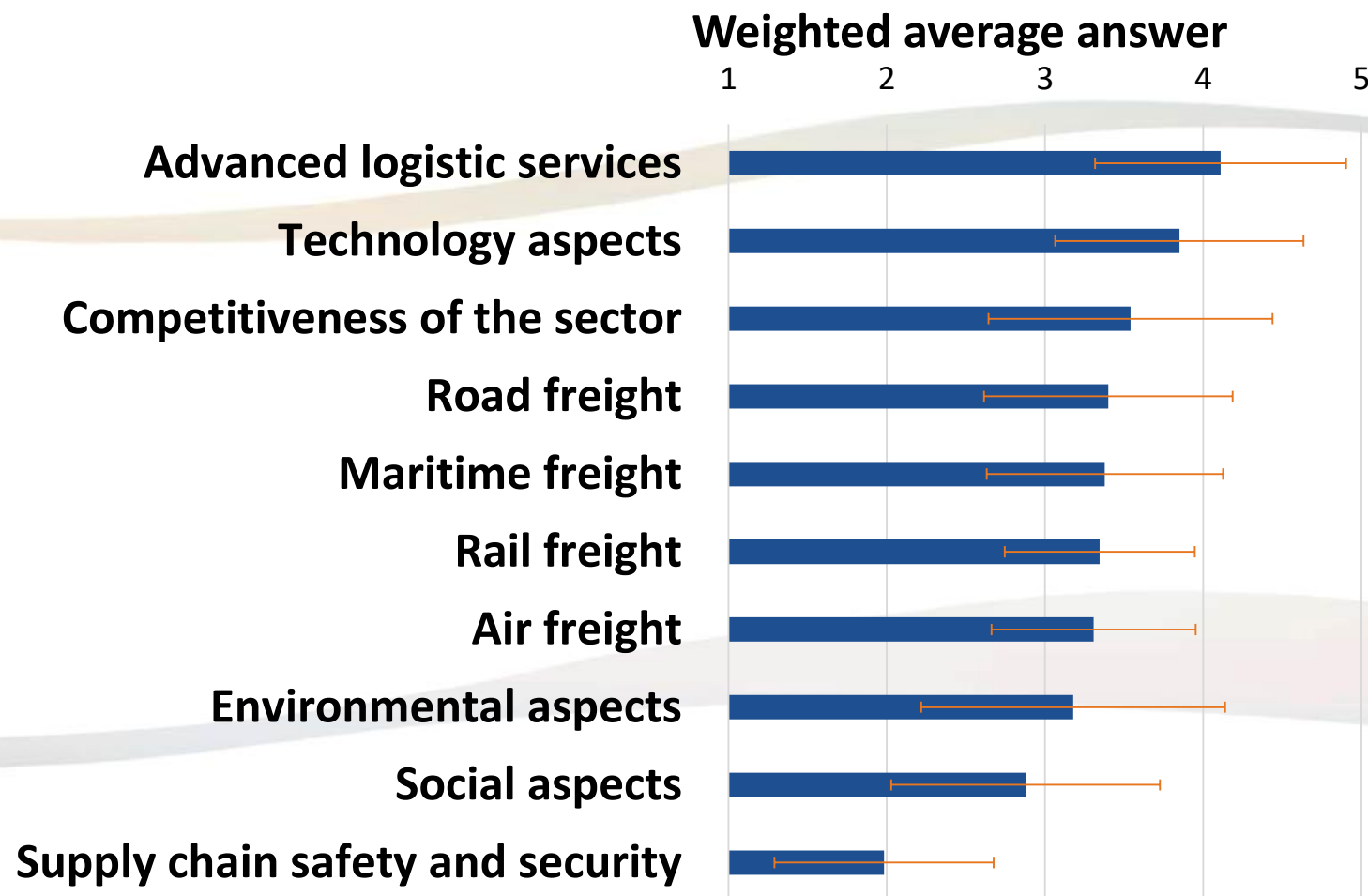
Theme on transport and logistics	Number of questions
Competitiveness of the sector	6
Road freight	9
Rail freight	5
Air freight	3
Maritime freight	7
Advanced logistics services	4
Technology aspects	6
Environmental aspects	3
Social aspects	4
Supply chain safety and security	5

Level of Expertise of the Panel (N = 97)



Weighted Responses by Theme (N = 97)

- 5-level scale in response options
- Generally, the higher the score, the more positive the outlook



Key Findings: Outlook in the BSR till Year 2030

- Environmental issues continue to grow larger
- Significant technological advances expected
- Taxes and regulatory compliance expected to increase costs
- Lack of skilled labour anticipated

The four questions with the highest and lowest average values in view of 2030	By 2025	By 2030	Diff.
The use of TRACKING AND TRACING TECHNOLOGIES will increase	4,65	4,76	0,11
The demand for ENVIRONMENTALLY SUSTAINABLE services will increase	4,36	4,74	0,37
The importance for the COMPETITIVENESS of the BSR will increase	4,35	4,48	0,14
Fuel/energy efficiency in ROAD FREIGHT TRANSPORT will improve	4,31	4,44	0,13
BORDER CROSSING CONTROL in road freight between EU and non-EU countries have become more difficult	3,22	2,55	-0,67
AVAILABILITY OF SKILLED LABOUR will increase	2,61	2,41	-0,20
TAXES AND OTHER OFFICIAL CHARGES will decrease	1,75	2,03	0,28
The costs to comply with ENVIRONMENTAL REGULATION will decrease	1,60	2,00	0,40

Key Findings on Differences Between the New and Preceding study

**Greatest difference
(and anticipated
deterioration) in
border control of
road freight transport
between EU and non-
EU countries**

Difference in the extreme values between the 2025 & 2030 survey results	By 2025	By 2030	Diff.
The use of TRACKING AND TRACING TECHNOLOGIES will increase	4,65	4,76	0,11
The demand for ENVIRONMENTALLY SUSTAINABLE services will increase	4,36	4,74	0,37
<u>BORDER CROSSING CONTROL in road freight between EU and non-EU countries have become more difficult</u>	<u>3,22</u>	<u>2,55</u>	<u>- 0,67</u>
TAXES AND OTHER OFFICIAL CHARGES will decrease	1,75	2,03	0,28
The costs to comply with ENVIRONMENTAL REGULATION will decrease	1,60	2,00	0,40

Thank you!

Full questionnaire available at <https://blogit.utu.fi/hazard/>