

Round Table local meeting report Finland

Activity: WP 2, Activity 2.1.2.3

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1 Executive summary

The objective of this part NSB Core WP 2 has been to gather information from Finnish industry, trade and logistics service providers about their interest, attitudes and potential for the new logistics corridor through Baltic countries and beyond.

Gathered information in Finland was based on 15 depth interviews. In spite of the reasonably low number of interviewees they represent a very big part of the county's export and import business.

The information was further discussed in several seminars and meetings and the roundtable meeting.

Based on all discussions the Finnish stakeholders see a remarkable potential for intermodal transports as soon as the Rail Baltica part of the corridor is ready. The annual growth between Finland and Eastern Central Europe is 3-4 %. This is bigger than between other trading areas. We estimate that in 2025 the monthly unit volume alone from/ to Finland could be over 9000 units (containers, semitrailers, lorries or other transport units).

2 General Background of Activity

Activities in 2.1 are focusing on gathering the background knowledge and building up the initial conditions for project's demonstration, evaluation and knowledge sharing activities, stronger networks between stakeholders and to make them work together regarding specific challenges.

Activity 2.1.2.3 from a side will set the picture of the current intermodal logistics situations within the North Sea Baltic Corridor and from the other side will define the main goals and needs of the relevant stakeholders (Logistics Service providers and Shippers) and will identify the main challenges, opportunities and priorities.

Round Table serve as the feedback occasion for the companies (Logistics Service Providers and Shippers) that have participated in the interviews – Activities 2.1.2.1 and 2.1.2.2.

The main focus is to gain more understanding and future users for that intermodal corridor.

3 Round Table Meeting report

3.1 General info

The Finland Round Table meeting was held in Helsinki 19th August 2017 at Hotel Seurahuone. All the interviewees were invited but the number of participants was unfortunately low. On the other

hand, because 2-3 hours depth interviews had been conducted with the main industry decision makers earlier in the year, most of the relevant comments and views had been gathered.

In addition the same information was also given to Finland’s Central Chamber of Commerce Transport Committee 30th August. Some additional comments were given by the members of the Committee, who represent a high level expertise of logistics and transport business in Finland. In that meeting there were 14 participants.

Table 1 – Participant list

No	Name	Organization
1	Ulla Tapaninen	City of Helsinki
2	Nina Liljeqvist	Port of Helsinki Ltd
3	Harald Knaapinen	DB Schenker
4	Timo Hatva	Stora Enso
5	Kaisa Saario	Central Chamber of Commerce
6	Kari Ruuhonen	FinEst Link project
7	Sakari Saarinen	Uusimaa Regional Council
8	Malla Paajanen	Uusimaa Regional Council
9	Jorma Härkönen	TechVilla
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3.2 Round Table Meeting agenda, 19th August, Helsinki

13,00 – 13.15

- Welcoming words and the basic elements of NSB Core project (Jorma Härkönen, Techvilla)
- The presentation of Finland key findings of the interviews (J. Härkönen)

13.45 – 14.30

- FinEst Link (Helsinki-Tallinn tunnel) project planning update (Kari Ruuhonen)

14.30 Coffee break

14.50 – 15.15

- Preliminary results from other countries

15.15. – 16.00

- General feedback discussion by participants

3.3 Key findings coming from the discussion

1. For Finnish industry, trade and LSP's it creates an important new alternative for unit transport to and from Central Eastern Europe. However, there does not seem to be any interest to the whole length of the corridor. Northern Poland, Germany and North Sea ports are well served by efficient shipping connections. This means that the biggest interest focuses on Rail Baltica part of the corridor and part of Poland.
2. Some doubts were given to the technical and interoperational bottlenecks when the train is moving through several countries. Most of the commentators have experience from Central Europe and other parts of the world.
3. The general opinion of the shippers was that the new connection is no threat at all for existing Baltic and North Sea shipping operators. Finland's export volumes are substantial and the big industries have created systems for sea transport, in some cases by own shipping companies. Nothing changes the fact that Finland is behind the seas and the major volumes will always be carried by sea.
4. Lorries can be replaced by intermodal transports when the destinations/origins are further south than Baltic countries. We have a preliminary estimate that in 2025 this unit volume could be in the region of 300 units per day.
5. At the moment the balance to and from Poland is good. Interestingly, part of imports from China are coming by train to Warsaw where it is reloaded in lorries to Finland.
6. In this discussion as well as at Central Chamber of Commerce concern was expressed how the present hostile attitude of Polish government to EU will affect the Poland's willingness to invest in modernizing the North Eastern problematic parts of the rail corridor.
7. Container balance and availability of containers will be a critical thing especially for the forest industry companies. In recent years there has been a chronic lack of export containers in Finland mainly because the container imports to St. Petersburg area have gone down due to sanctions and other reasons. This will be a clear challenge for the operators as the whole export/import volumes are not in balance.
8. Many questions were raised about the system of transporting the cargo across the Gulf of Finland. At the moment most of the units are carried by dense passenger ship connections. Only one ship is dedicated to cargo. There is not, however, any big changes in this, until the possible tunnel connection has been built. This will take 10-30 years if it ever will be reality.

4 General summary

There is clear interest among Finnish industries, trade and logistics operators towards the new corridor and more precisely northern part of it. The companies (also logistics operators) do want to favour intermodal transports to lorries if the transport distance is enough long. In practice this means minimum of 400 – 500 kilometers or longer. In Eastern Central Europe the distance minimums are longer due to relatively strong competition situation by lorry operators.

One of the main messages from business representatives is that the new service must be competitive. This does not mean only pricing, but information flow, ICT services and timetable reliability. On the other hand the sustainability and green logistics solutions are of interest to everybody nowadays. In many cases the customers require it and expect their suppliers to act in that direction.

It appears that Finland will a big beneficiary of the new connection.