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The role of RAM/Spc Italy in the Mediterranean framework: Marebonus and MedAtlantic Ecobonus initiatives

Luebeck, 20.06.2018

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RAM S.p.a.

Logistica · Infrastrutture · Trasporti

1. RAM IN A NUTSHELL

RAM IN A NUTSHELL COMPANY'S EVOLUTION

2008

ReteAutostrade
Mediterranee S.p.a.

2017

RAM S.p.a.
Logistica · Infrastrutture · Trasporti

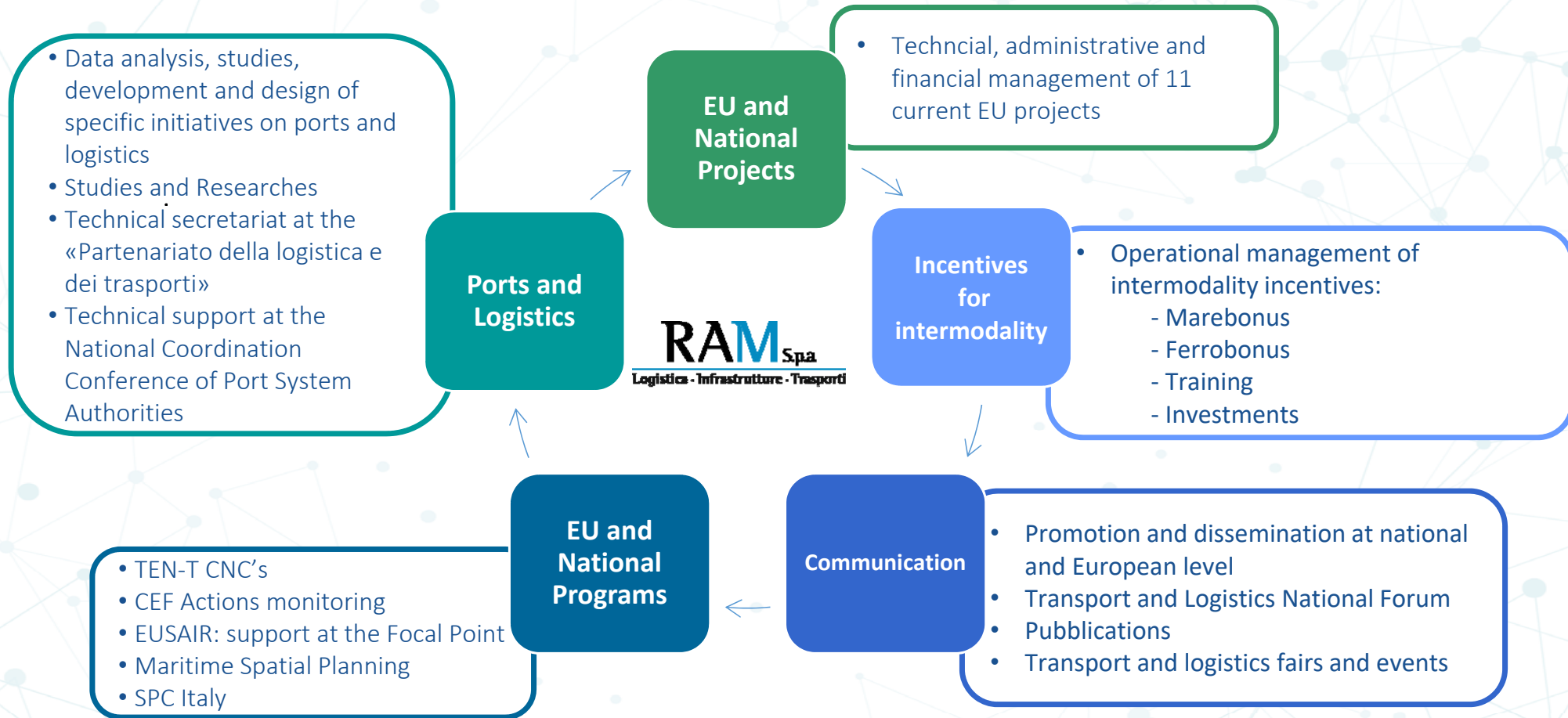
NEW NAME – NEW MISSION

Founded on 17th march 2004, in November 2017 the Company modified its Statute, converting its name in RAM Logistica Infrastrutture e Trasporti Spa and expanding its functions in the strategic planning and operational support in transport, infrastructural and logistics sector, in conjunction with the Italian Ministry of Infrastructure and Transport.

SHARE CAPITAL	100% IT Ministry of Finances	SHARE CAPITAL	100% IT Ministry of Finances
OPERATIONAL	In house company IT Ministry of Infrastructures and Transport	OPERATIONAL	In house company IT Ministry of Infrastructures and Transport
MISSION	Motorways of the Sea Development	MISSION	Technical support for Transport and Logistics planning and programming

RAM IN A NUTSHELL

MAIN ACTIVITIES



SPC - ITALY

In April 2015, RAM S.p.a. the Ministry of Infrastructures and Transport appointed RAM Spa as **Short Sea Shipping Promotion Center – Italy (SPC-Italy)**

The activities :

- ❖ Support the implementation of the National Strategic Plan for Ports and Logistics as implementing body of the Italian Ministry of Infrastructure and Transport;
- ❖ Development of initiatives for the promotion of MoS and intermodality;
- ❖ **Participation to EU projects** supporting Short Sea Shipping and Mos in Europe (Med Atlantic Ecobonus, Fresh Food Corridors projects);
- ❖ Organization and participation to **events and meetings** engaging the major stakeholders;
- ❖ **Data elaboration** and collection on SSS and MoS traffic in Italy;
- ❖ Elaboration and coordination of the **ESN newsletter**.

In addition to that, **SPC-Italy collaborates with the Escola Europea de SSS** of Barcelona (a training center that offers courses to students and professionals of Short Sea Shipping and intermodal transport) in the following activities:

- joint elaboration of project proposals within the CEF and Erasmus
- teaching and participation to the Institute courses (MOST ITALY).



2. SHORT SEA SHIPPING AND MOS IN THE MEDITERRANEAN FRAMEWORK: THE ROLE OF ITALY

ITALIAN MOS IN THE EURO-MEDITERRANEAN FRAMEWORK

Ro-Ro

- market share in Italy: more than 20% of the Ro-Ro tons in EU 28
- Italy second in Europe for tons moved in 2016
- Growth (2014-2017):

Ro-Ro IT:	+ 23,5%
Ro-Ro EU 28:	+ 7,3%



Ro-Pax

- Italy first position in Europe for non-cruise passengers in 2016
- 4.8 million passengers on international routes in 2016, of which about 1.3 million related to non-EU connections

RO-RO AND RO-PAX SERVICES FROM TOWARDS ITALIAN PORTS (2017)



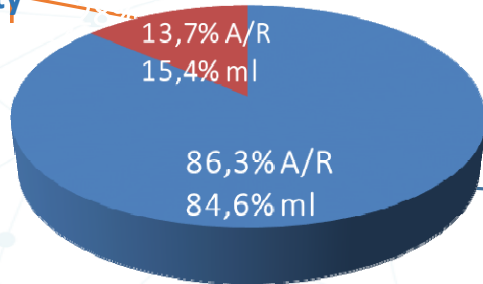
MOS SERVICES IN ITALY IN 2016

SERVICES

over 1124 national and international Ro-Ro/Ro-Pa connections
for over 2,6 million ml of cargo per week

Weekly data per shipowner nationality

outside Italy
154 connections
0.4 M ml hold capacity



Equivalent to
Bolzano Lecce
(return trip)

Italy
970 connections
2,2 M ml hold capacity

INFRASTRUCTURES

278 berths

18.8 million m2 of parking/storage areas

1.378 loading/unloading vehicles



MOS AND FREIGHT TRANSPORT IN ITALY

Ro-Ro traffic (increasing % 2017 compared to 2014):

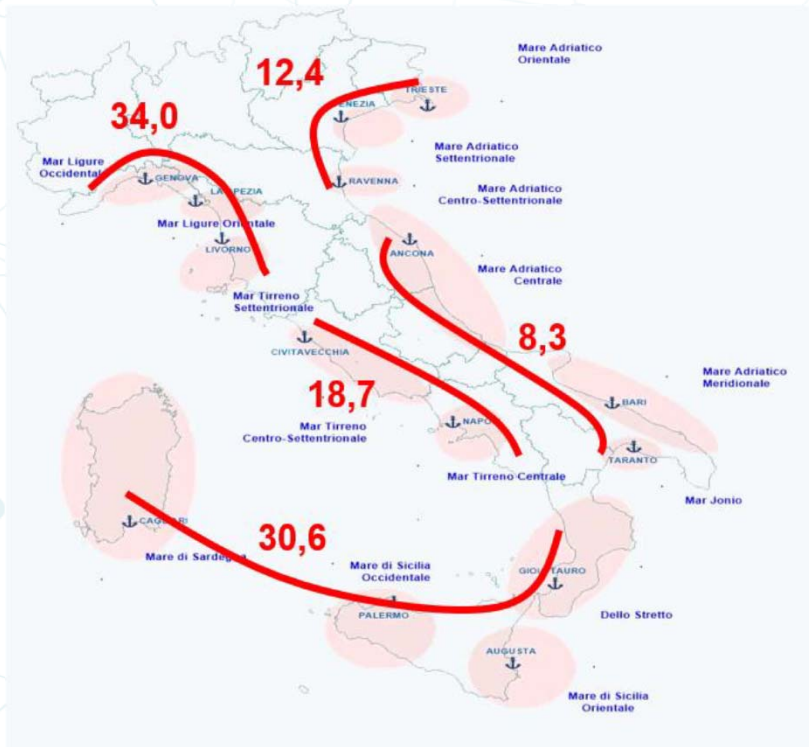
Mode	Italy
Air Cargo (tonn)	+24.2%
Sea (tonn)	+8.28%
Ro-Ro	+23.5%
Container	+5.1%
Rail (treni*km)	+11%
Motorways veic*km)	+12.9%
Trunck Road (heavy goods vehicles)	+10.3%

GDP

+ 3.5 %

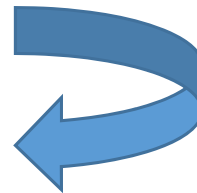
MOS AND NATIONAL CABOTAGE

TRAFFIC IN Mt PER CLUSTER (2017)



BREAKDOWN TRAFFIC HANDLING (2017)

65% national cabotage



35% international



TRAFFIC IN THE MAIN PORTS (2017)

PORT	2017 [Mtonn]	Var % 2017-2016
Livorno	14,4	16,2
Genova	9,3	7,8
Trieste	8,8	4,4
Salerno	8,2	17,7
Catania	7,8	10,5

MOS FOR A SUSTAINABLE LOGISTICS

- Mos traffic 2017
 - 1.5 billion of vehicles·km
 - equal to about 8% of the highway freight traffic volumes in Italy (2017 projection)



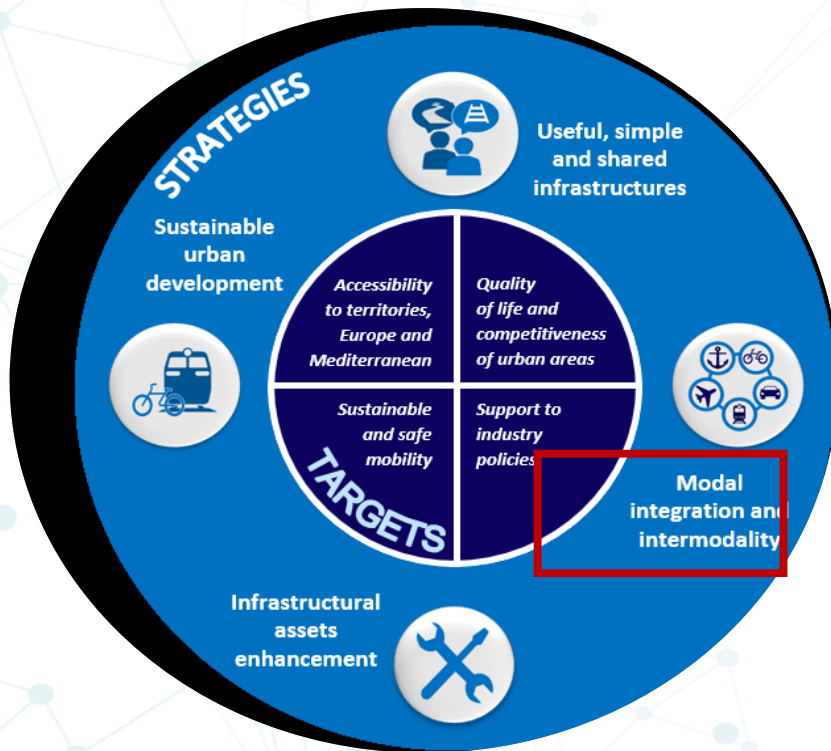
estimated save: about 680,000 tons of CO2 equivalent (equal to the emissions produced by the traffic in a city of 1 million inhabitants in 1 year)

3. CONNECTING ITALY: INTERMODALITY AS PILLAR OF THE ITALIAN POLICY ON TRANSPORT, LOGISTICS AND INFRASTRUCTURES



CONNECTING ITALY

VISION, STRATEGIES, OBJECTIVES AND TOOLS



Objectives:

- Environmental sustainability
- Social sustainability
- Economic sustainability

Tools:



Infrastructures



Simplifications



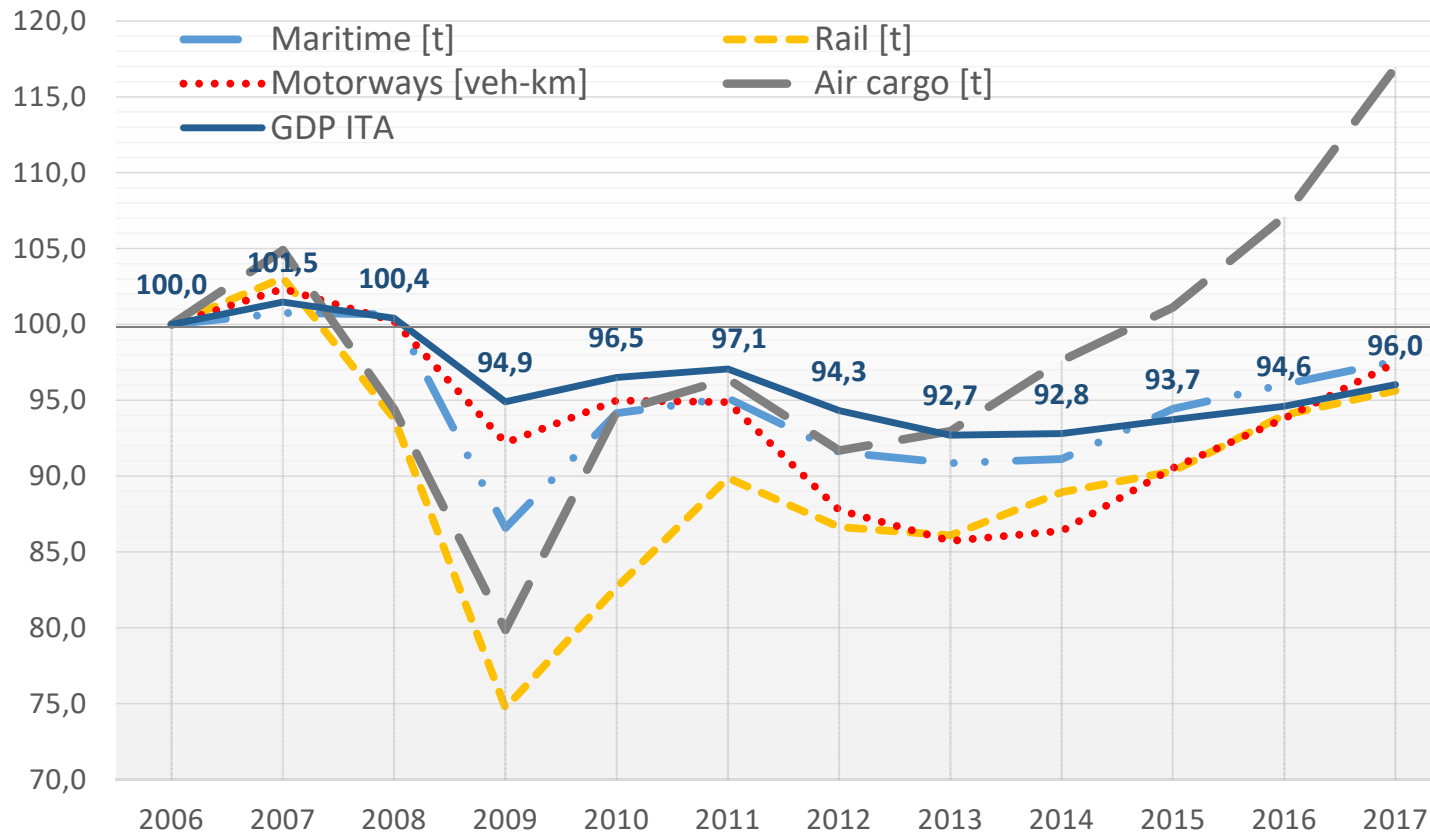
Incentives

CONNECTING ITALY THE MAIN ISSUES

- ❖ **Infrastructural investments up to 2030** € 181,6 Bln
Financial coverage 76%
- ❖ **The «Rail therapy»** From the High Speed Rail to the AVR Network
Infrastructures: rail freight corridors from the Alps to the Sea
Operational and documentary simplifications for intermodal transport
Incentives to promote intermodality (Ferrobonus)
- ❖ **The «Sea therapy»** The new governance: 15 Port System Authorities (PSA) 58 ports vs. 24 Port Authorities
PSA national coordination Conference
Partnership for Logistics and Transport
Simplification, new regulation and procedures
Incentive to promote MoS (Marebonus)
Ports infrastructures
- ❖ **Road and motorways** Simplification and Incentives for the road transport
Extension of the Smart Roads Programme to the entire Road and Motorway Core Network
- ❖

TRENDS IN FREIGHT TRAFFIC

ELASTICITY BETWEEN GDP AND TRANSPORT MODES TRENDS



Freight transport flows increase faster than the GDP rise, with the following factors:

- Maritime: 2.0
- Road: 3.7
- Rail: 6,7
- Air Cargo: 8,3

Different transport modes elasticity due to their impact to the related macroeconomic fundamentals trends:

- the high increase of IT exports explain the air cargo boom;
- the maritime and rail potential is slowed down by the contraction of the industrial production and the households consumptions (domestic freight mobility and import of raw materials that are still weak).

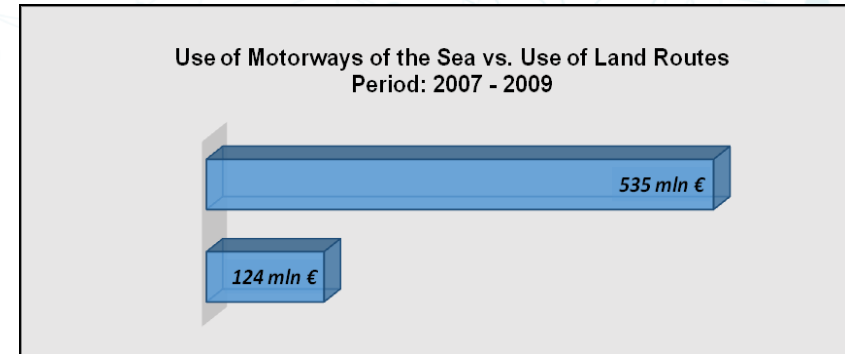
Source: elaboration RAM Logistica Infrastrutture e Trasporti on Assoport, Assoaeroporti, AISCAT, ISTAT data

An aerial photograph of a multi-lane highway stretching into the distance. A large white semi-truck with a green stripe is driving in the right lane. To the right of the highway, a train with several blue and white freight cars is moving. The sky is blue with scattered white clouds. A semi-transparent grey banner is overlaid across the middle of the image, containing the text.

4. FOCUS ON INCENTIVE SCHEMES TO PROMOTE MOS

ECOBONUS: A CASE STUDY

The **Ecobonus incentive** was launched by Italian Government and managed by RAM Spa. It was an incentive for trucks, allocating the subsidy directly to the users of the maritime transport service, in order to promote a gradual shift of heavy goods vehicles from road to sea, by compensating the external costs incurred from road transport in relation to the identified maritime connections on a certain number of eligible routes. Grants were provided as a reimbursement (up to 30%) of incurred costs by hauliers.



Main objectives:

- promote the modal re-balancing of freight transport enhancing the use of the maritime mode;
- support the Italian road transport sector reducing road congestion, as well as mitigating adverse environmental impacts.

YEARS 2007 - 2010			
YEAR	TRIPS	TOTAL COST	ECOBONUS AID
2007	461.849	211.784.229	45.658.071
2008	489.128	245.824.076	62.979.271
2009	479.313	223.688.468	59.930.086
TOTALE	1.430.290	681.296.773	168.567.428
2010	569.967	277.542.968	74.633.821*
<i>GROWTH TREND COMPARED TO PREVIOUS YEAR (2010)</i>			25%
<i>* Reduced to € 30 M after reductions of financial resources</i>			

MAREBONUS: FROM THE NATIONAL STRATEGIC PLAN FOR PORTS AND LOGISTICS (2015)

PIANO STRATEGICO NAZIONALE DELLA PORTUALITA' E DELLA LOGISTICA		
UNA VISION PER IL SETTORE PORTUALE E LOGISTICO ITALIANO ✓ Il sistema portuale e logistico: ✓ Per la ripresa economica del Paese ✓ Come strumento attivo di politica Euro-Mediterranea ✓ Per lo sviluppo e la coesione del Mezzogiorno ✓ Per la promozione della sostenibilità	Obiettivo 1 Semplificazione e snellimento	Azione 1 Misure per la Semplificazione e la velocizzazione delle procedure, dei controlli e degli interventi sui Porti di interesse nazionale
	Obiettivo 2 Concorrenza, trasparenza e upgrading dei servizi	Azione 2 Misure per l'efficiamento dei servizi portuali e l'aumento della competitività degli operatori
	Obiettivo 3 Miglioramento accessibilità e collegamenti marittimi e terrestri	Azione 3 Misure per migliorare i servizi di trasporto ed aumentare l'accessibilità dei porti via mare e via terra
	Obiettivo 4 Integrazione del Sistema Logistico	Azione 4 Misure per incentivare l'integrazione delle catene logistiche e delle attività manifatturiere e logistiche
	Obiettivo 5 Miglioramento delle prestazioni infrastrutturali	Azione 5 Misure per il potenziamento infrastrutturale dei porti e dei loro collegamenti terrestri
	Obiettivo 6 Innovazione	Azione 6 Misure per incentivare la ricerca, lo sviluppo e l'innovazione tecnologica nella portualità italiana
	Obiettivo 7 Sostenibilità	Azione 7 Misure per l'efficiamento energetico e la sostenibilità ambientale dei porti
	Obiettivo 8 Certeza e programmabilità delle risorse finanziarie	Azione 8 Misure per il finanziamento della gestione e degli investimenti dei Sistemi Portuali
	Obiettivo 9 Coordinamento Nazionale, condivisione e confronto partenariale	Azione 9 Coordinamento, programmazione e promozione nazionale del Sistema Mare
	Obiettivo 10 Attualizzazione della governance del Sistema Mare	Azione 10 Misure per adeguare la Governance dei Porti alla missione della Portualità italiana

The National Strategic Plan for Ports and Logistics, starting with a survey of existing infrastructure and services, has placed at the center of the strategy to revitalize the logistics sector in Italy, the national port system focusing ten objectives, declined in several strategic actions. Marebonus scheme is included in Objective 3 and in the corresponding Action 3.5.

Objective No. 3
Improvement of accessibility and maritime and land connections

Action No. 3
Measures to improve transport services and increase the accessibility of ports by sea and by land

Action No. 3.5
Measures to promote the development of Ro-Ro traffic and Motorways of the Sea by aggregating and encouraging the freight transport demand

THE MARITIME DIMENSION OF THE TEN-T NETWORKS: MOS BENEFITS

Externalities	Road Transport €/1000tkm*	Rail Transport €/1000tkm**	Maritime Transport €/1000tkm
Air Pollution	4,91	1,111	1,81
Greenhouse Gases	5,32	-	1,5
Accidents	1,23	0,001	-
Congestion	14,85	0,250	-
Noise	0,09	0,131	-
Total	26,40	1,492	3,31

* Vehicles from 17,1 tons

** 100% electric traction

Source: Price Waterhouse Coopers SpA, 2015

INCENTIVES' OPERATIONAL MANAGEMENT FOR THE INTERMODALITY MAREBONUS

- Following the Ecobonus Incentive (2007-2010) that provided a **reimbursement of up to 30% of the costs sustained by road haulage companies** that choose to use the Motorways of the Sea rather than roads and motorways, the Italian government, through the implementing body RAM, is boosting the use of highways of the sea with the 'Marebonus' instrument (approved by EC with **decision C(2016) 8459 19 December 2016**).
- The **objective** of Marebonus is to support the launching of new maritime services for combined freight transport or the upgrade of existing services for combined freight transport, **sustaining so the whole intermodal chain** and thus generating **environmental and wider social benefits** from reduced lorry journeys on the road network.
- Marebonus, with its budget of over 118M €, provides grants to ship-owners (up to 30% of operational costs) with the intention to offset some of the additional costs of switching to a more environmentally friendly mode of transport with the commitment to transfer at least 70% of the aid received as discount or reimbursement to end users/hauliers.



MAREBONUS: BENEFICIARIES AND MECHANISM

❖ Beneficiaries

The ship-owning companies, also in form of consortia or through slots agreement, based in one of the European Union or the European Economic Area, which submit three-year projects for the improvement of new shipping services Ro-Ro and Ro-Pax for multimodal transport of goods or improvement of the services on existing routes, arriving and departing from ports in Italy, connecting ports situated in Italy or in other EU Member States or the European Economic Area.

❖ Incentive Mechanism

The incentive may vary until an established maximum of 10 euro cents per embarked units multiplied by each kilometer of road avoided. Eligible routes and distances in kilometers of road avoided are contained in an implementing decree issued after the ministerial decree.

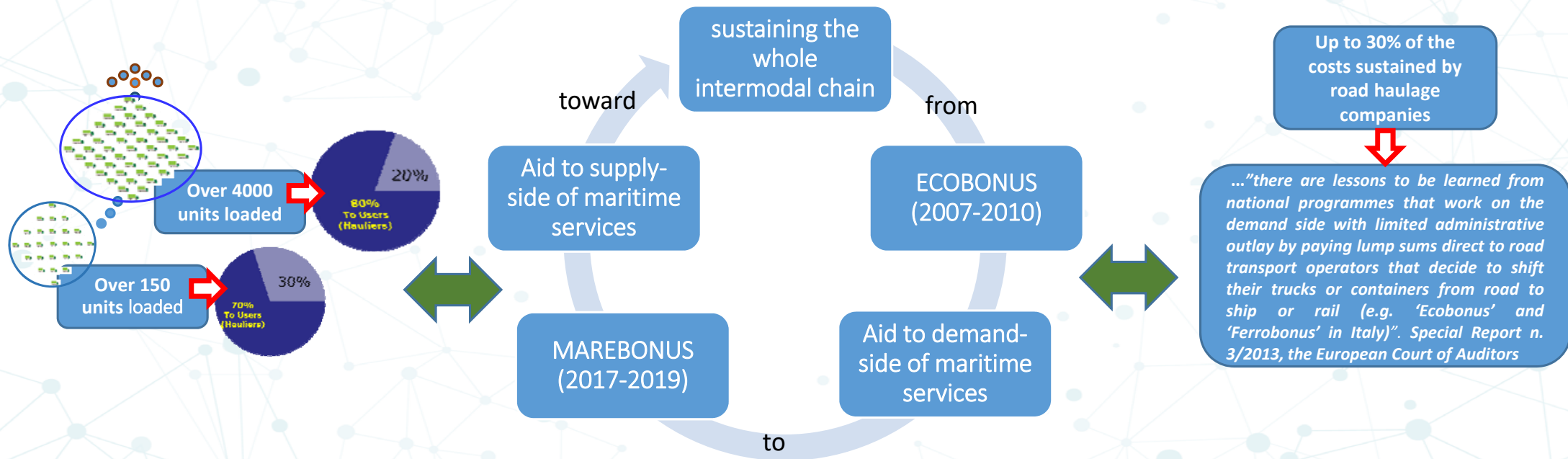
❖ Indirect contribution sharing system

In order to reinforce the intermodal chain and the financial sustainability of the projects to be implemented, the beneficiary will be required to allocate annually for customers who have made at least 150 shipments of transport units per year, a quota of at least 70% of the grant received. That percentage is raised to at least 80% for firms that have embarked at least 4000 shipments of transport units per year.

INCENTIVES' OPERATIONAL MANAGEMENT FOR THE INTERMODALITY

MAREBONUS

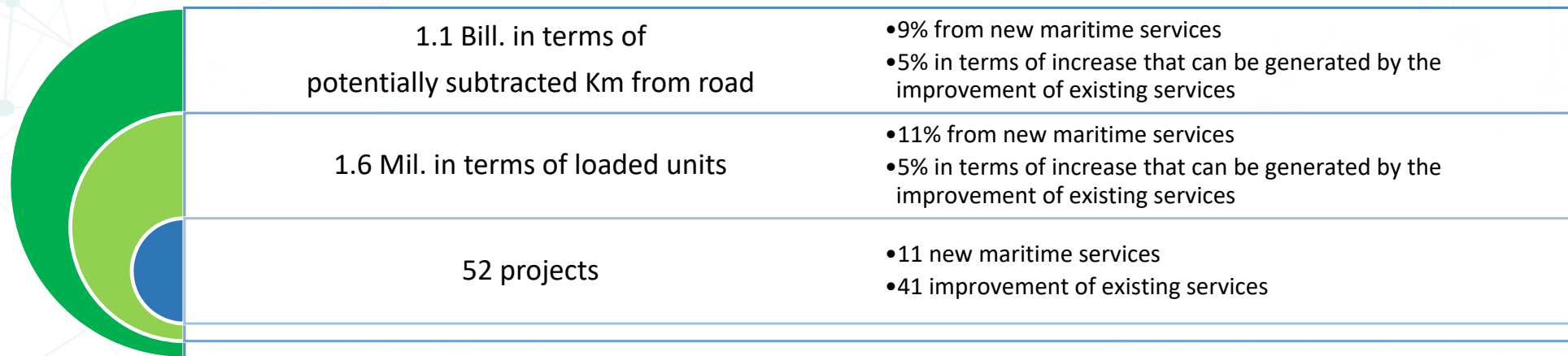
- Marebonus provides **grants to ship-owners** (max 0,10 € per loaded unit) with the intention to offset some of the additional costs of switching to a more environmentally friendly mode of transport with the **commitment to transfer at least 70% of the aid received as discount or reimbursement to end users/hauliers**.



MAREBONUS: FIRST RESULTS

In order to simulate the impacts on the whole chain, some numbers came out from the first analysis on approved projects.

The unit value of the contribution for each embarked unit should be between 0.03 cents euro and 0.05 cents euro (year 2017/18).



INCENTIVES' OPERATIONAL MANAGEMENT FOR THE INTERMODALITY MED ATLANTIC ECOBONUS

MED ATLANTIC
ECOBONUS



Co-financed by the European Union
Connecting Europe Facility

Partners of the Action: Puertos del Estado – Spain (Lead Partner); Ministries of Transport of France and Italy, Instituto da mobilidade e dos transportes (Portugal),

Duration: July 2015 – December 2018

Budget: € 1.543.842,00

INCENTIVES' OPERATIONAL MANAGEMENT FOR THE INTERMODALITY MED ATLANTIC ECOBONUS

INCENTIVATION MECHANISM

The Traditional Approach

- CEF boosts intermodal transport acting on the supply of soft and hard infrastructures
- Marco Polo and Marco Polo II boost intermodal transport acting on the carriers

The Italian Approach

- In the Italian experience intermodal transport is boosted acting on the Demand , as illustrated by the successful Ecobonus, Ferrobonus and Marebonus actions

INCENTIVES' OPERATIONAL MANAGEMENT FOR THE INTERMODALITY MED ATLANTIC ECOBONUS

DUAL CALL MECHANISM

First Call



Green Investments



Ship Owners



Based on the environmental performances
of the vessels used

Second Call



Green Routes



Road Hauliers



Based on the environmental performances
of the shipowners and on the number of
trips

Achieving Modal shift and boosting the environmental performances of intermodal transport

INCENTIVES' OPERATIONAL MANAGEMENT FOR THE INTERMODALITY MED ATLANTIC ECOBONUS

THE END GAME

Inclusion of the
Incentive Scheme
in the 2021 – 2027 EU budget

Allowing Member States to deploy their national
funds for the incentivisation of intermodality

A much needed modification of the 2004 guidelines on state aid to
maritime transport and their application by the Commission by allowing
state aids based on modal shift and not only on start ups

Convergence of
the Member
States in order to
incentivize
Intermodality

Next steps

June. 2018

First Draft

Sept./Oct. 2018

Sharing & Discussion

Dec. 2018

Proposal

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Thank you for your attention!
