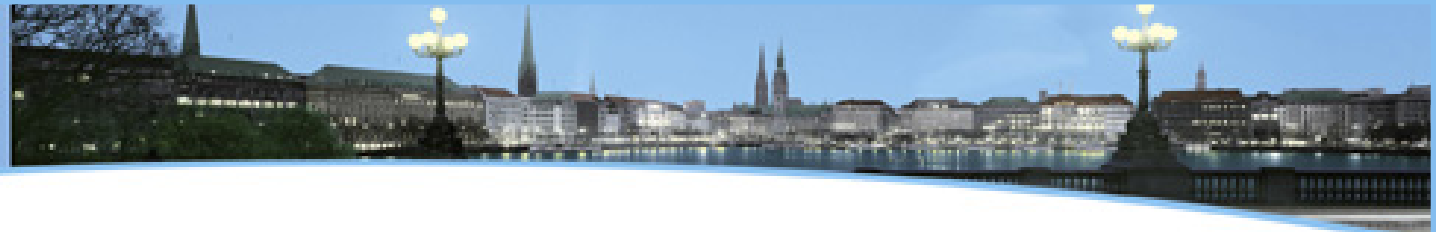




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„PPP for financing Hamburg port infrastructure?“



Port-Net Workshop

Port Financing I

13 September 2006

Dr. Jörg Märkt



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PPP for financing Hamburg port infrastructure

1. Some facts & figures about the port
2. The „Hafenquerspange A 252“
3. PPP-Financing for the Hafenquerspange
4. Conclusion



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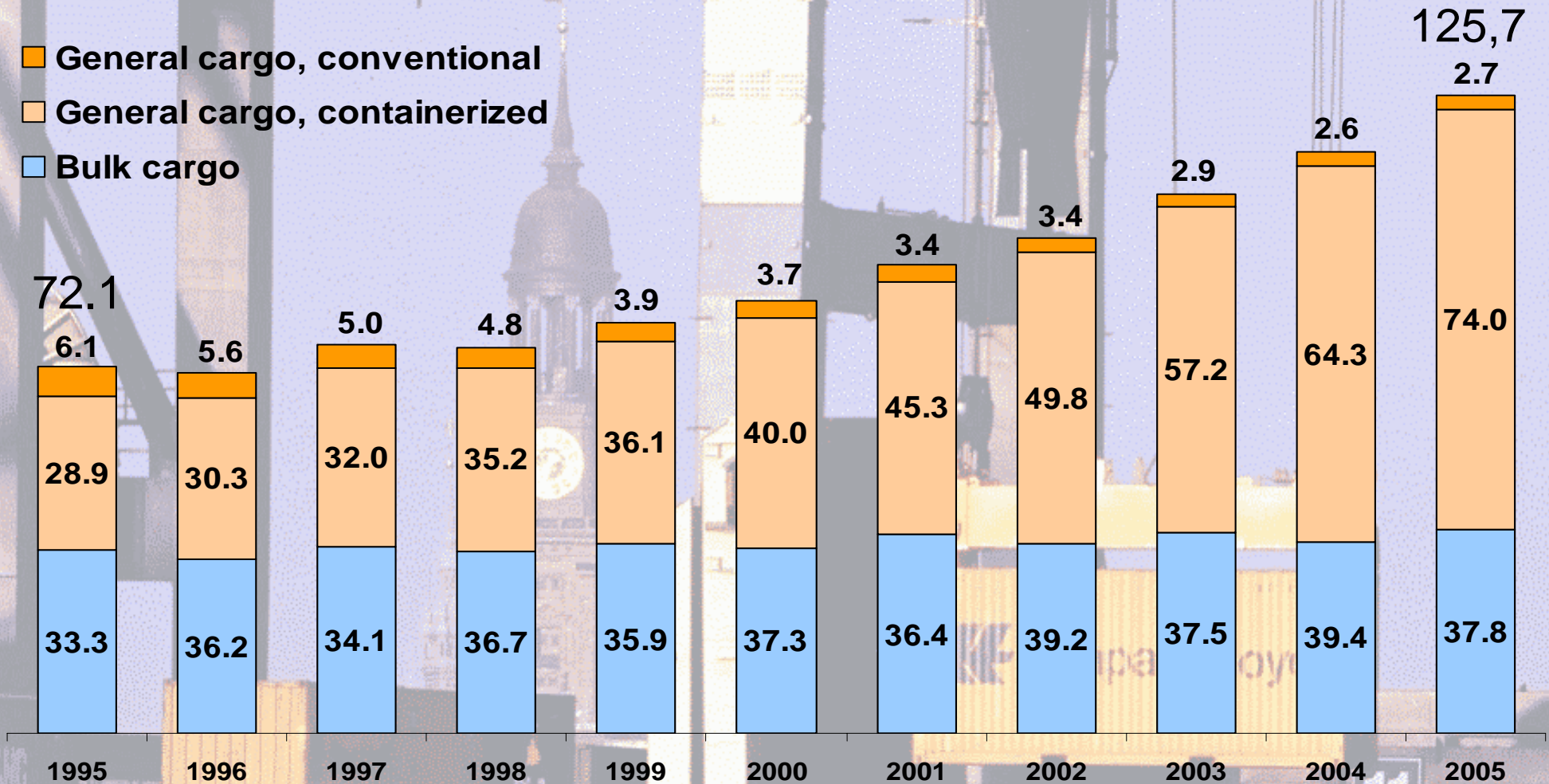
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Breakdown of total cargo (millions of tons)

- General cargo, conventional
- General cargo, containerized
- Bulk cargo

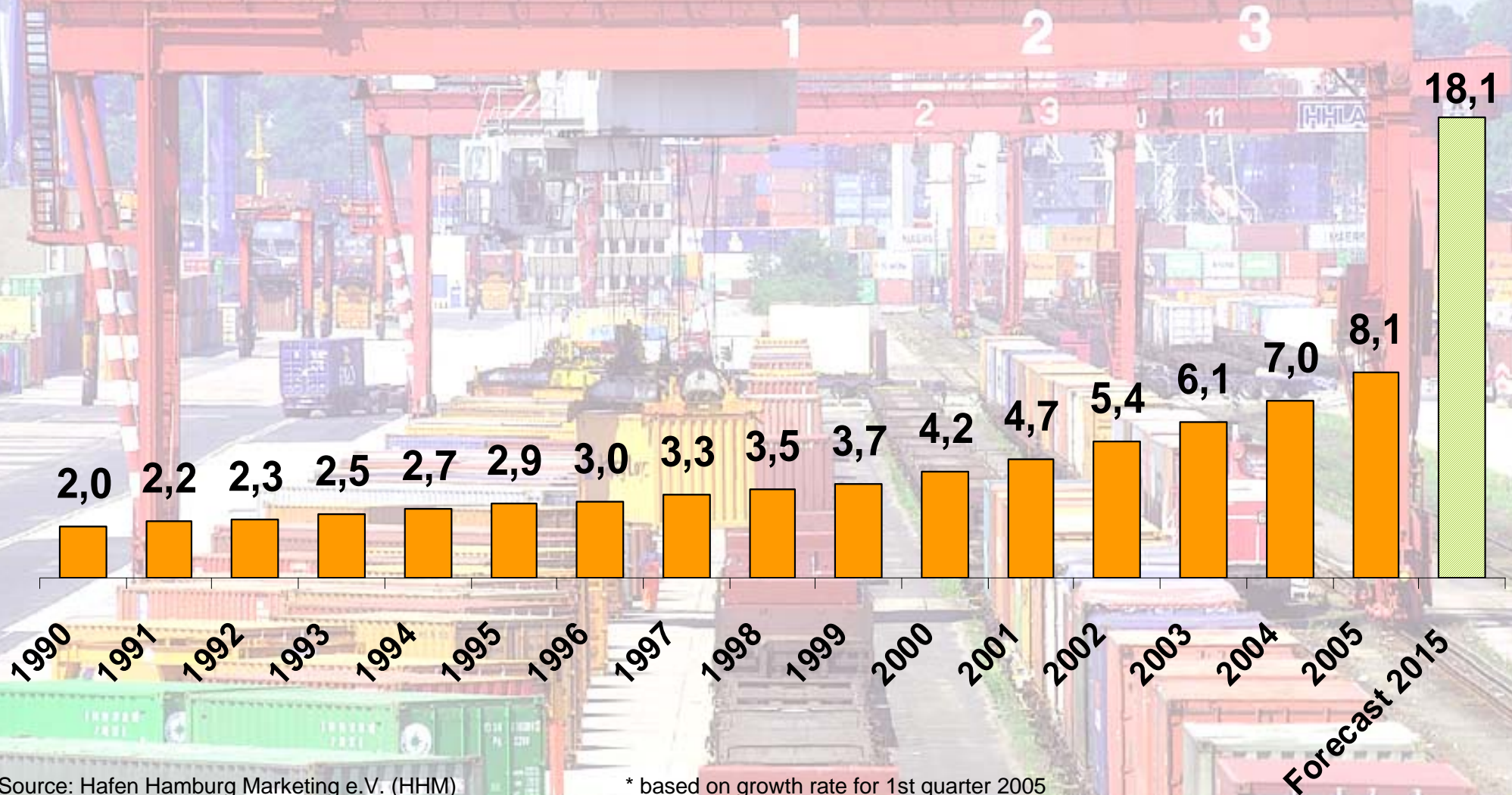


* forecast value (based on results for 1st half of 2005)

Source: Hafen Hamburg Marketing e.V.



Container traffic trend (in millions of TEU)



Source: Hafen Hamburg Marketing e.V. (HHM)

* based on growth rate for 1st quarter 2005

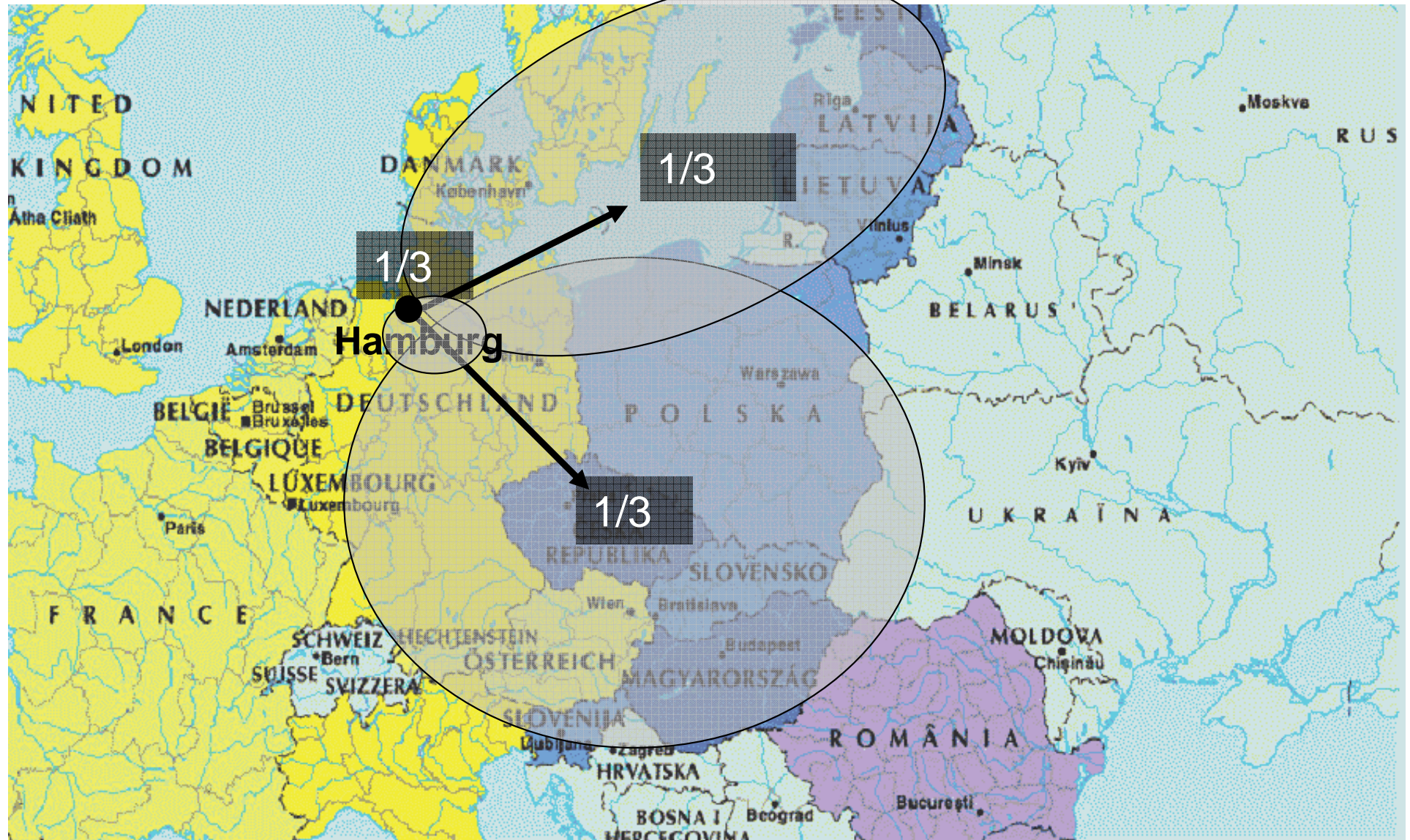


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Port of Hamburg – hinterland





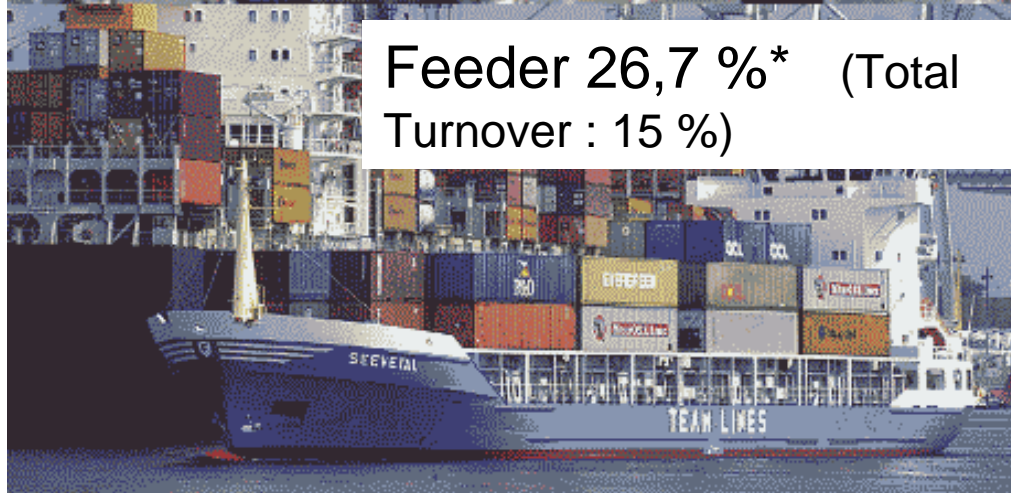
„Modal Split“: Container-Hinterland-Transport 2005



Road 49,5 %*
(Total Turnover: 44 %)



Rail 22,2 %*
(Total Turnover : 32 %)



Feeder 26,7 %* (Total
Turnover : 15 %)



Inlandwaterways 1,6 %*
(Total Turnover : 10%)

*Schätzung Hafen Hamburg Marketing e.V.

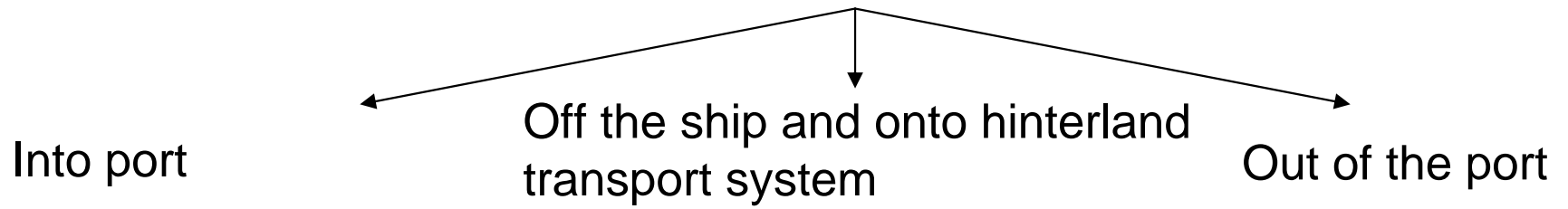


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Port strategy for the future – the “into-off-onto-out” principle



Infrastructure requirements for 2.5x growth factor

Marine access

Deeper shipping lane
in Lower and Outer Elbe.

Handling capacity

New container terminal in
the centre of the free port
zone

Hinterland transport

Hinterland transport system, esp. road infrastr.



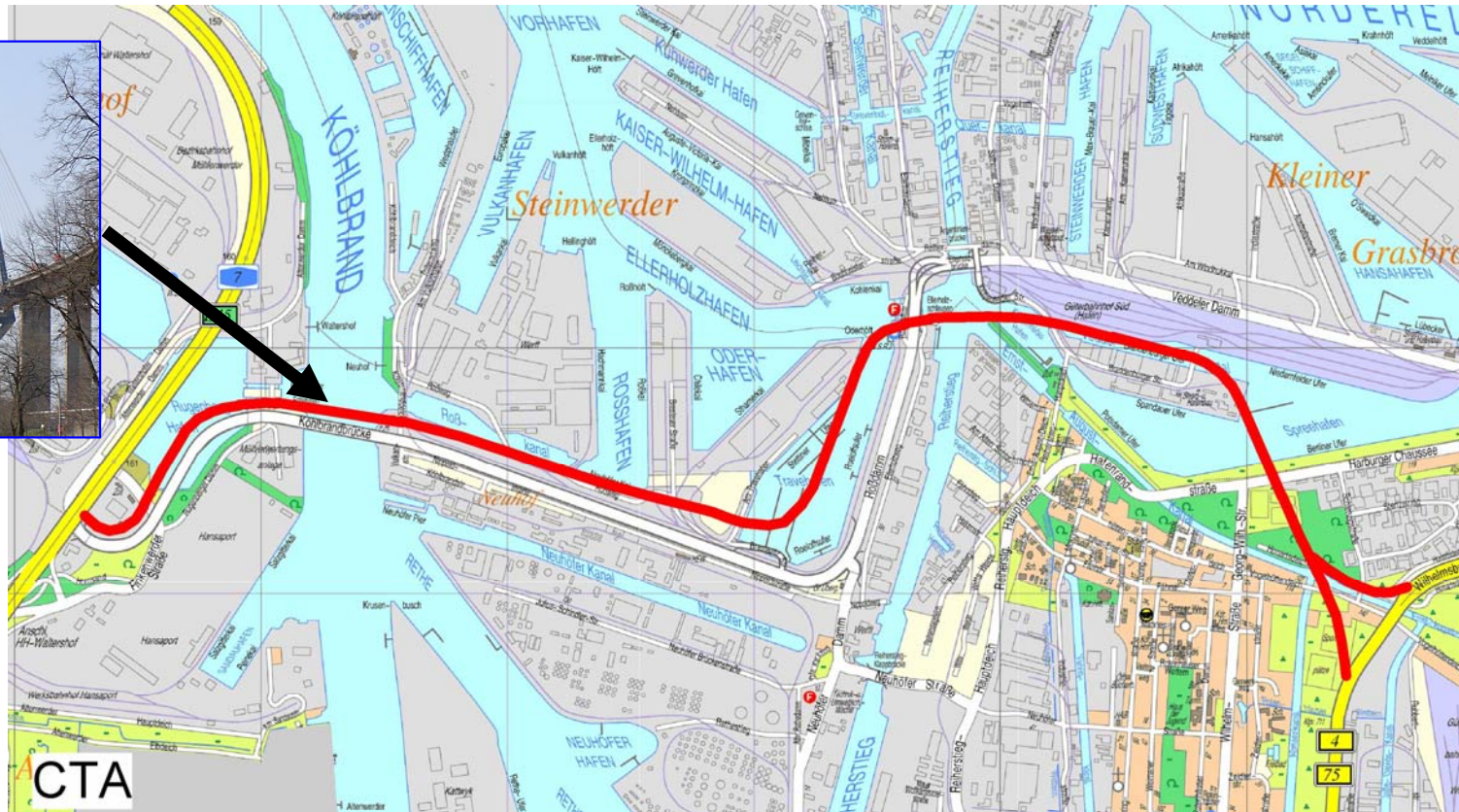
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Waltershof (A7) – Georgswerder
 4-lane-highway
 8 km
 475,3 Mio. €



Traffic prognosis

Today there are approximately 6.600 container trucks weekdays, driving along the Köhlbrand bridge. Within five years, there will be 10.800 trucks each day. (+ 65%)

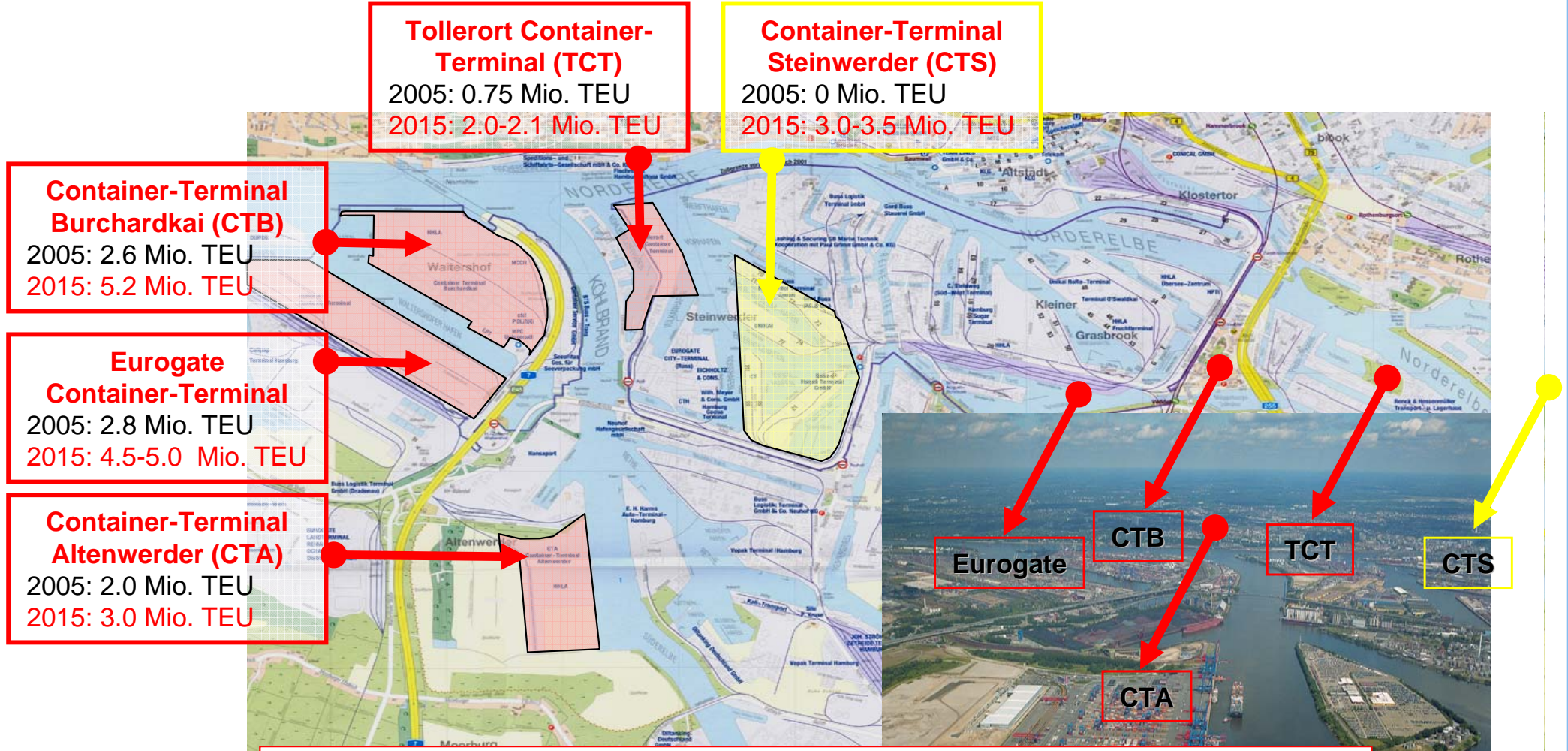
Traffic prognosis 2015

A traffic prognosis is available for the “Hafenquerspange” for 2015 (it does not take into account a possible toll):

Average daily traffic (weekdays)	= 79,000 vehicles/24hrs
thereof:	
average daily heavy goods traffic	= 23,000 vehicles/24hrs



Upgrading of Hamburger Container Terminals

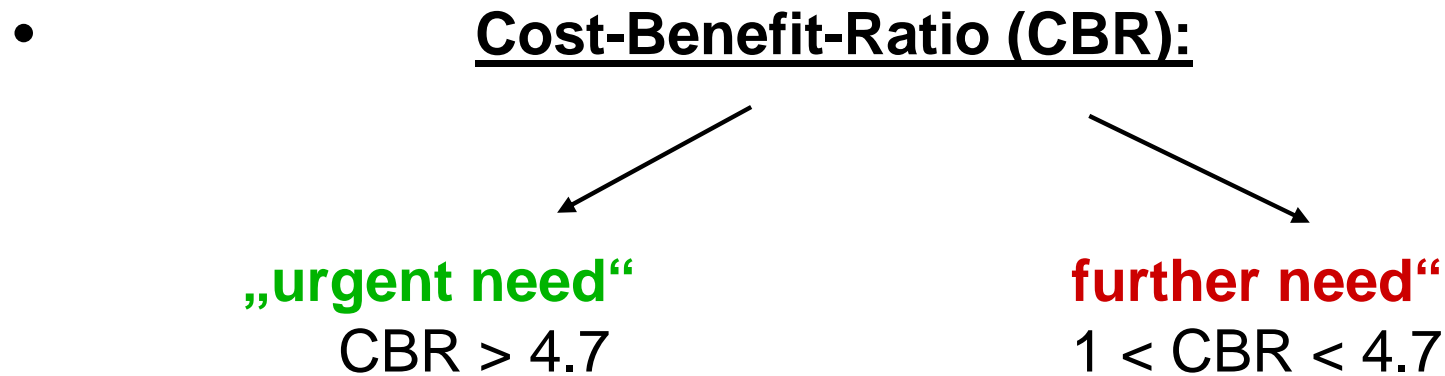


Desired-Terminal-Capacity in 2015: 18-19 Mio. TEU
Actual-Terminal-Capacity in 2005 : 8.1-8.5 Mio. TEU



Federal Transport Infrastructure Plan 2003

- Benchmark-test for infrastructure projects under economic, environmental and geographic aspects.



- Länder-Ratio: regulates for all Länder the ratio, which the federal government invests (out of his total infrastructure-budget) in infrastructure projects in each Land
- Hamburg: in average 5%, because of the 4th tunnel section the money is bounded for years.

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Given Facts: HQS

- Trans-European Network (TEN-T)
“project of common interest”
- Federal Transport Infrastructure Plan 2003:
„further need“
- Requirements Plan for National Roads
(7/2004):
„further need with the federal authorisation to conduct planning activities“
- Design and lay-out according the German Long-Distance Road Act has has been presented
- Within the actual Federal Transport Infrastructure Plan the realisation of the A 252 is not possible (before 2015)



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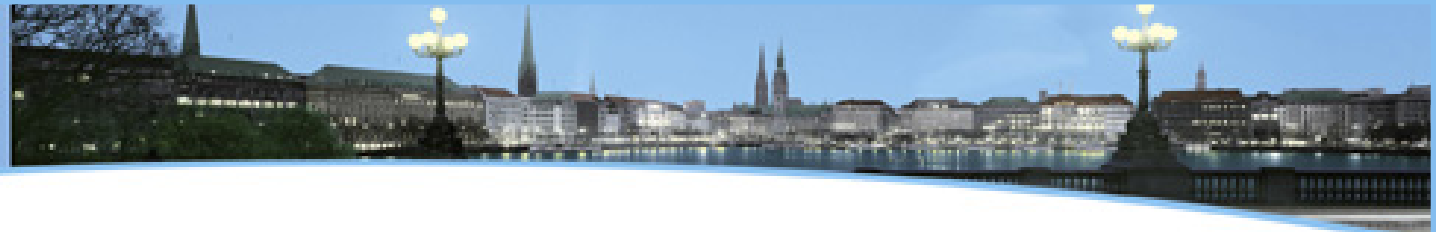
F-Model

“Fernstraßenbauprivatfinanzierungsgesetz”

Private financing of national long-distance roads along bridges, tunnels and mountain passes according to the *Act on the Private Financing for the Construction of Long-Distance Roads*

Existing F-Model implementations:

- Warnow underpass Rostock
- Herren Tunnel Lübeck

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F-Model: Regulation

- transfer of (design), construction, maintenance and operation to a private concessionaire
- normal validity of a concession: 30 years
- the concessionaire obtains the right to collect tolls (private cars + lorries)
- the Federal Ministry of Transport, Building and Urban Development determines the toll sections and the fees in legal regulations
- start-up financing by the federal government amounting to up to 20% of the construction costs; may be higher in specific cases

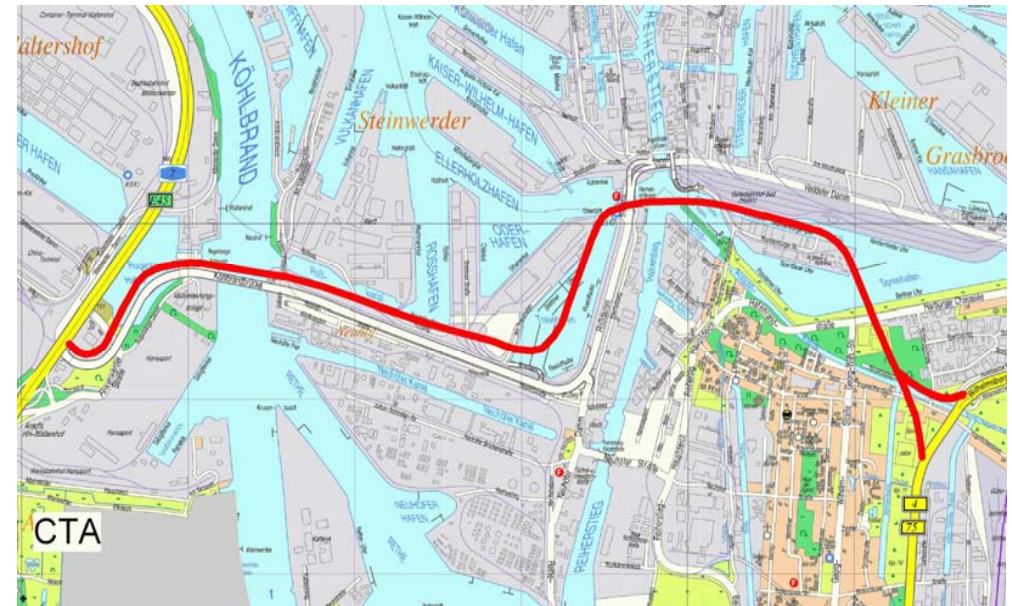


Position of our Chamber of Commerce

Assumption: a binding agreement, that the completion of the HQS will be before 2013

Fifty-fifty co-financing through the Free and Hanseatic City of Hamburg and the users (= toll) (only the amount is not financed by the federal ministry of transportation)

Lorry-Ratio ($\geq 7,5$ t) not exceeding 1/3 of the total toll-revenue (with crediting against the general Lorry-toll)

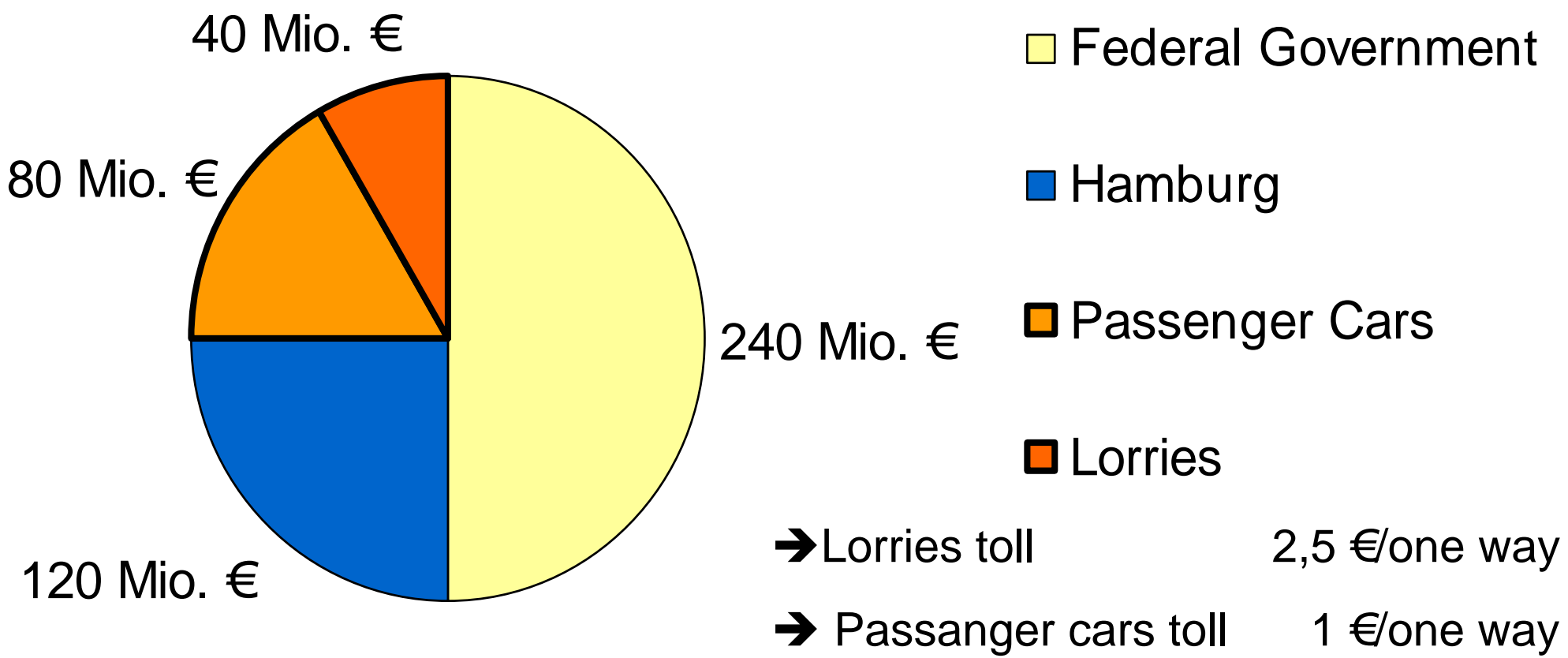


Köhlbrand bridge weekdays:
34.000 vehicles, there from 33% lorries



Financing-Model

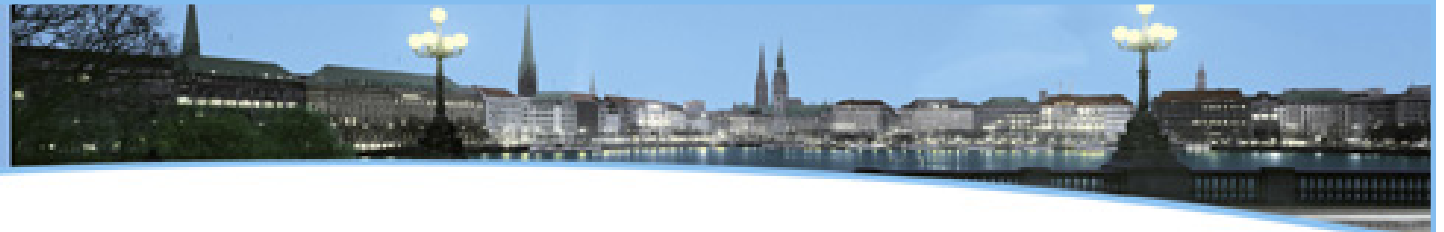
Total Costs: 480 Mio. Euro





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Conclusion

There are two options:

Caught up in the
traffic jam



or

paying and driving

?

