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EU Strategy for the  
Adriatic and Ionian Region  
**EUSAIR**



Connecting the Region  
**EUSAIR**



# TOWARDS THE FIRST UPDATE OF THE EUSAIR MASTER PLAN ON TRANSPORT FOR THE ADRIATIC AND IONIAN REGION

***Technical Assistance Workplan***

22<sup>nd</sup> MEETING OF THE TSG2 ON TRANSPORT

25 February 2025



# *Technical assistance FP IT PP*

## **Contract**

- Scope: Update the EUSAIR Master Plan on Transport (ETMP) and EUSAIR Multimodal Transport Model (EMTM)
- Duration: 02/2025-06/2027 (28 months)
- Budget: ~ € 90,000
- Under EUSAIR governance project EUSAIR Facility Point - Supporting the EUSAIR Governance for improved cooperation

## **Contractor**

- Tplan Consulting ([www.tplan.consulting](http://www.tplan.consulting))
  - Elaborated the EUSAIR Multimodal Transport Model in the period 2019-2022
  - Involved in other relevant technical assistance initiatives, e.g.
    - Leading the studies of the Baltic-Adriatic TEN-T Corridor since 2014
    - Currently involved in 5 European Transport Corridor Studies by DG MOVE, Unit B1
    - Leading the Rail Freight Corridors and European Transport Corridor EU-wide Transport Market Study by RailNetEurope



# *Updating the EUSAIR Master Plan on Transport (EMPT)*

Objectives & purposes, approach, indicative contents, tools, tasks...



# *Updating the EUSAIR Master Plan on Transport*

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## **Strategic objectives of the Master Plan**

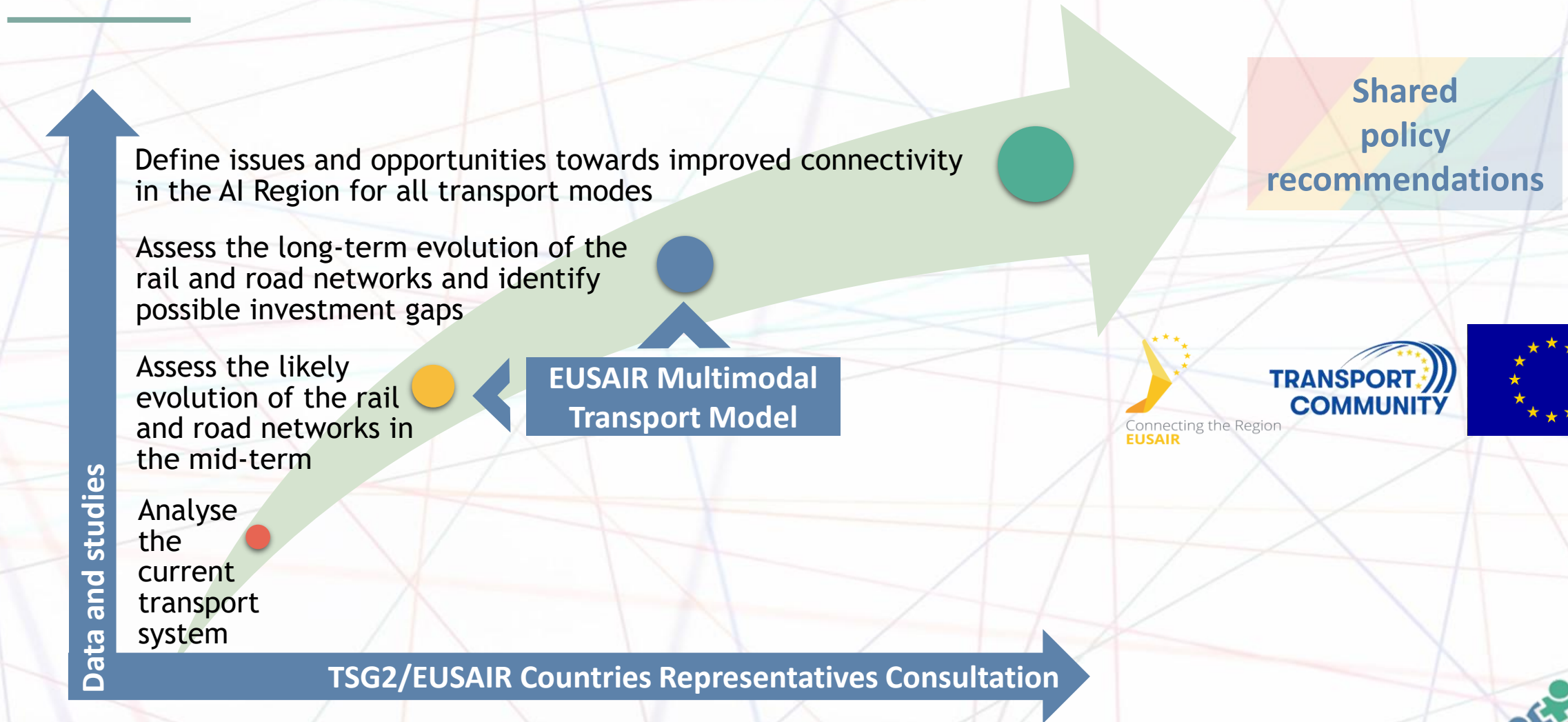
- Create a common knowledge base on the status and perspectives of the transport system in the AI region
  - To facilitate a coordinated implementation of the EUSAIR in the fields of transport & mobility
- Provide operational support to the EUSAIR governance by identifying common issues and opportunities
  - For a more effective dialogue within the TSG Members and with the external stakeholders (EU, TCT...)

## **Purposes of the 1<sup>st</sup> update of the Master Plan**

- Set the implementation of the EUSAIR in the new EU transport & mobility policy framework
- Update the EUSAIR transport system knowledge base with reference to TEN-T requirements
- Review planned investments and assess their impact on development of the AI Region transport system
- Confirm/update main issues and opportunities towards improved connectivity in the AI Region



# ***EUSAIR Master Plan on Transport - Approach***



# Updated Master Plan / indicative content

## Executive summary

Chapter 1	EUSAIR Master Plan on Transport - Executive summary
Introduction	The Master Plan as a tool for the implementation of the EUSAIR
Section 01	Updating the EUSAIR Master Plan in the framework of the EU policies on mobility and transport
Section 02	Adriatic-Ionian Region socio-economic background
Section 03	Adriatic-Ionian Region transport system
	Characteristics of the AI Region TEN-T core/extended core network infrastructure, core (comprehensive) nodes by mode, as well as urban nodes, with reference to the indicators monitored as part of the ETC studies
	Performance of the transport system by mode according to publicly available statistics
Section 04	Master Plan transport scenarios
	Infrastructure projects for the development of the rail and road networks in the AI Region, based on ETC common project lists, TCT studies, stakeholders' consultation
	Base year scenario (2024)
	Baseline projects' Scenario (2035)
	Long-term projects' scenario (2040)
	TEN-T completion scenario (2050)
Section 05	EUSAIR Improved Connectivity Roadmap
	Issues and opportunities towards improved connectivity in the AI Region by mode (based on TEN-T compliance analysis, Master Plan transport scenarios and stakeholders' consultation)
	Policy recommendations towards improved connectivity in the AI Region
	Inventory of Pillar topics' implementing actions (based on stakeholders' consultation)
	Overview of cross-pillar initiatives based on stakeholders' consultation
	Promotion of the masterplan and synergies with other international actions (i.e. TCT, ADRION, other Macro-regional strategies... TEN-T ETCs implementation process)



# Updated Master Plan / indicative content

## Transport mode/thematic chapters - waterborne transport system

<b>Chapter 02</b>	<b>Adriatic-Ionian region maritime port infrastructure</b>
<b>Section 01</b>	Characteristics of the core (and comprehensive) ports with reference to the indicators monitored as part of the ETC studies
<b>Section 02</b>	Performance of the waterborne transport system according to publicly available statistics
<b>Section 03</b>	Issues and opportunities towards improved connectivity in the AI Region (based on TEN-T compliance analysis and stakeholders' consultation)
	Inventory of initiatives related to the Pillar topics' implementing actions
<b>Chapter 03</b>	<b>Adriatic-Ionian region inland waterways network and ports</b>
<b>Section 01</b>	Characteristics of the inland waterways infrastructure with reference to the indicators monitored as part of the ETC studies
<b>Section 02</b>	Characteristics of the core (and comprehensive) inland waterways ports with reference to the indicators monitored as part of the ETC studies
<b>Section 03</b>	Performance of the inland waterway transport system according to publicly available statistics
	Issues and opportunities towards improved connectivity in the AI Region (based on TEN-T compliance analysis and stakeholders' consultation)

# Updated Master Plan / indicative content

**Transport  
mode/thematic  
chapters - rail and  
road networks**

<b>Chapter 04</b>	<b>Adriatic-Ionian region rail and rail-road terminal infrastructure</b>
<b>Section 01</b>	Characteristics of the TEN-T core and extended core rail network infrastructure with reference to the indicators monitored as part of the ETC studies
<b>Section 02</b>	Characteristics of the TEN-T core (and comprehensive) rail-road terminals with reference to the indicators monitored as part of the ETC studies
<b>Section 03</b>	Performance of the rail transport network according to publicly available statistics
	Issues and opportunities towards improved connectivity in the AI Region (based on TEN-T compliance analysis, Master Plan transport scenarios and stakeholders' consultation)
	Inventory of initiatives related to the Pillar topics' implementing actions
<b>Chapter 05</b>	<b>Adriatic-Ionian region road infrastructure</b>
<b>Section 01</b>	Characteristics of the TEN-T core and extended core road network infrastructure with reference to the indicators monitored as part of the ETC studies
<b>Section 02</b>	Performance of the road transport network according to publicly available statistics
<b>Section 03</b>	Issues and opportunities towards improved connectivity in the AI Region (based on TEN-T compliance analysis, Master Plan transport scenarios and stakeholders' consultation)



# Updated Master Plan / indicative content

**Transport  
mode/thematic  
chapters - airports  
and urban nodes**

<b>Chapter 06</b>	<b>Adriatic-Ionian region airport infrastructure</b>
Section 01	Characteristics of the TEN-T core (and comprehensive) airports with reference to the indicators monitored as part of the ETC studies
Section 02	Performance of the AI region airports according to publicly available statistics
Section 03	Issues and opportunities towards improved connectivity in the AI Region (based on TEN-T compliance analysis and stakeholders' consultation)
<b>Chapter 07</b>	<b>Adriatic-Ionian region urban nodes</b>
Section 01	Characteristics of the TEN-T urban nodes with reference to the indicators monitored as part of the ETC studies
Section 02	Issues and opportunities towards improved connectivity in the AI Region (based on TEN-T compliance analysis and stakeholders' consultation)
Section 03	Inventory of initiatives related to the Pillar topics' implementing actions

# ***EUSAIR Multimodal Transport Model - Basics***

## **Multimodal**

- Passenger & freight transport
- Rail
- Road (public and private transport)



## **Zones covered**

- Adriatic-Ionian Countries (232 zones NUTS 3 or equivalent)
- External zones (138 NUTS3/2/1/0)





# EUSAIR Multimodal Transport Model - Uses

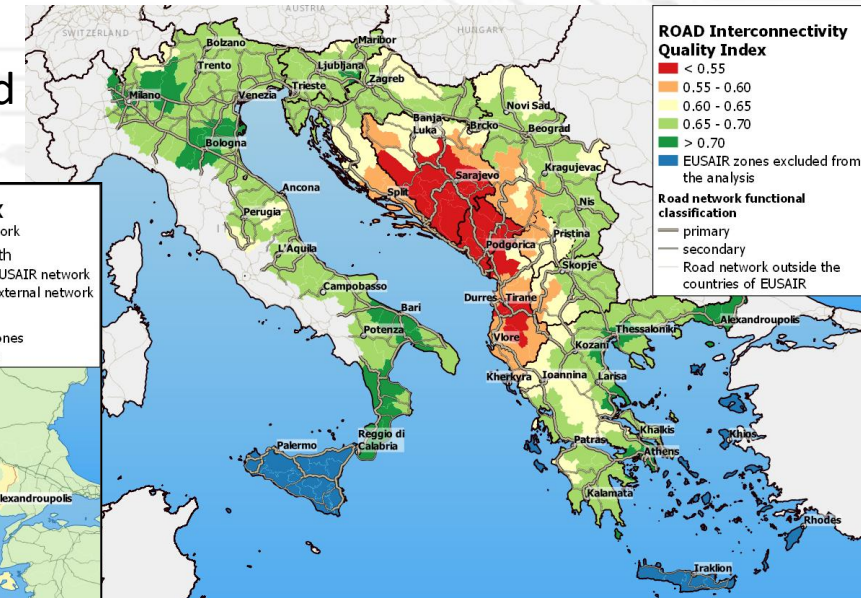
- Represent the current and future layout and characteristics of the networks



- Assess the performance of transport systems (e.g. capacity and modal share)

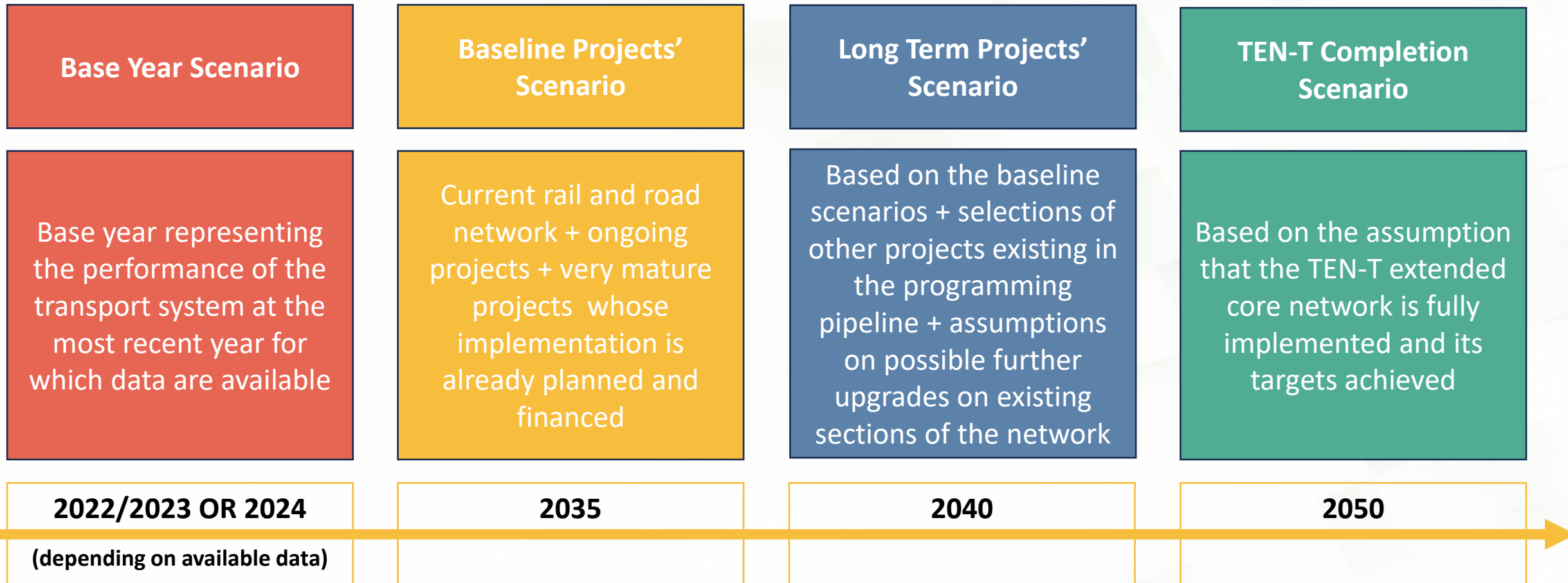


- Perform impact assessment analyses on transport operation and the environment



- Assess the performance of transport networks (e.g. accessibility/ interconnectivity)

# Master Plan transport rail and road infrastructure scenarios (EMTM)



REGULATION (EU) 2024/1679 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

# Updating the policy background

## New policies

- New TEN-T Regulation (EU) 1679/2024, also amending the RFC Regulation (EU) 913/2010
- New Alternative Fuel Infrastructure Regulation (EU) 1804/2023
- FuelEU Maritime Regulation (EU) 1805/2023
- ...

## Key stakeholders

- Permanent Secretariat of the Transport Community
- DG MOVE B1/European Coordinators of the European Transport Corridors, European Maritime Space, European Rail Traffic Management System
- ...

## Key synergic initiatives

- Infrastructure, market and sector studies by the Permanent Secretariat of the Transport Community
- European Transport Corridor/European Maritime Space Studies
- New ETC/EMS work plans expected by 2026, together with new RFCs Implementation plans...





REGULATION (EU) 2024/1679 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

REGULATION (EU) 2024/1679 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

# New TEN-T Regulation

Text with EEA relevance

Text with EEA relevance

THE EUROPEAN PARLIAMENT AND THE COUNCIL OF THE EUROPEAN UNION,

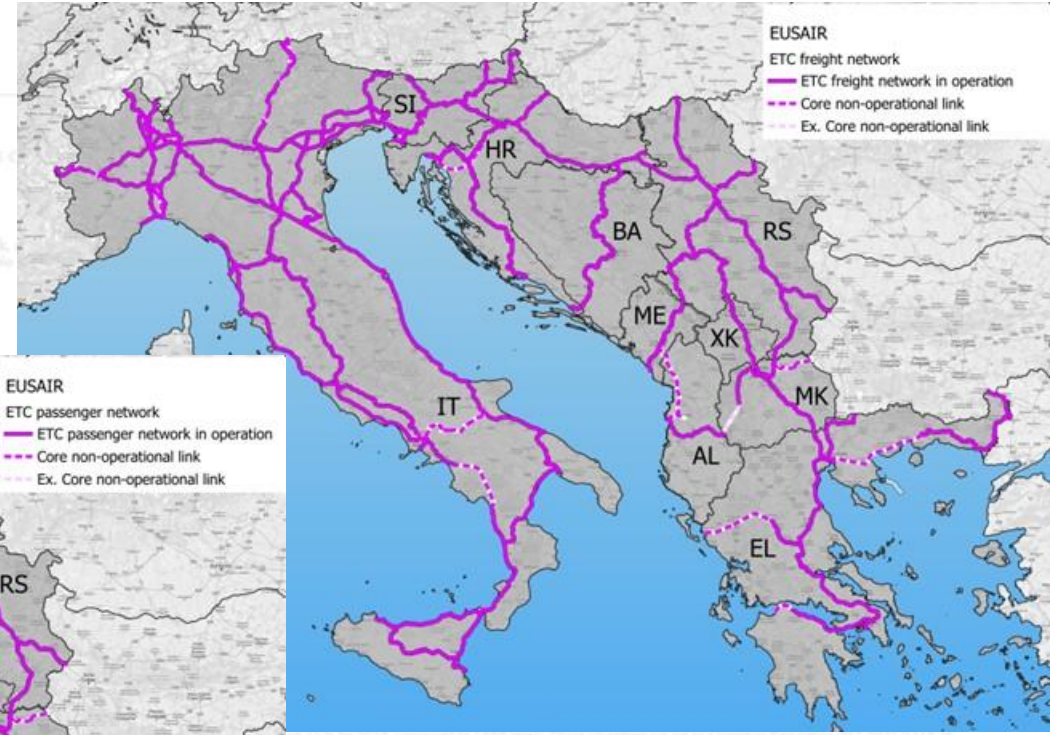
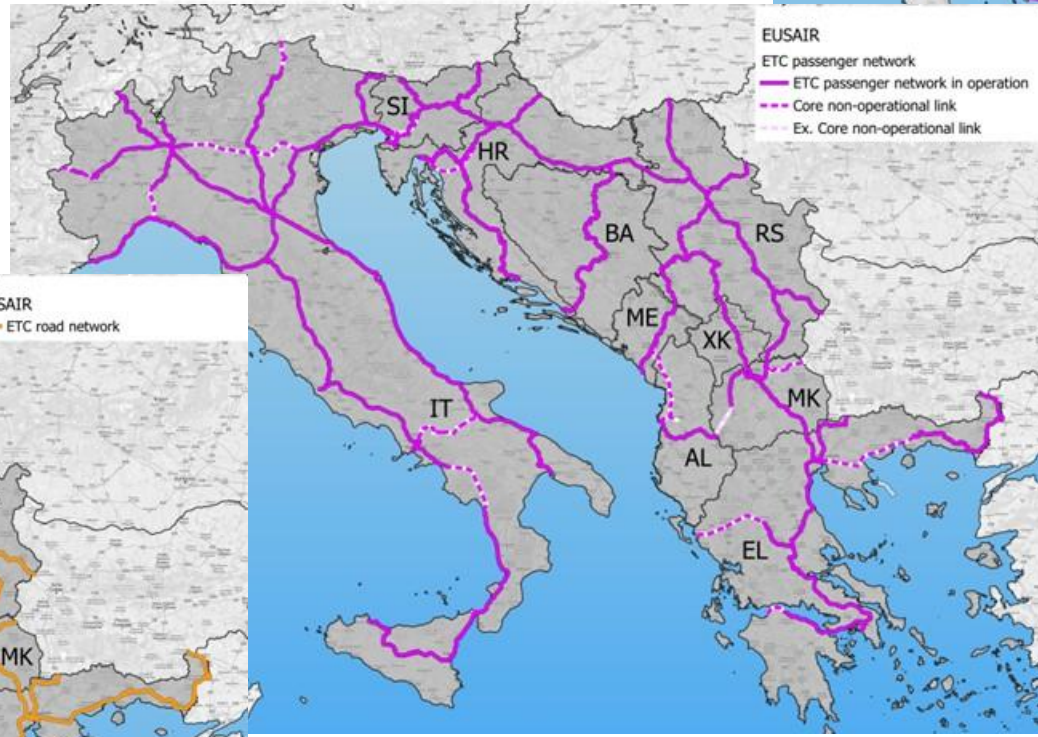
Having regard to the Treaty on the Functioning of the European Union, and in particular Article 172 thereof,

Having regard to the proposal from the European Commission,

After transmission of the draft legislative act to the national parliaments,

Noting regard to the opinion of the European Economic and Social Committee (1),

Having regard to the opinion of the Committee of the Regions (2),



Note: new alignments and new parameters: in line with the approach adopted in the ETC studies no comparison before vs after 2024 [entry into force of Regulation (EU) 1679/2024]



# *Updating the transport system knowledge base*

## **Socioeconomic data as background of the transport system analysis and EMTM demand model**

- To be collected from publicly available sources (Eurostat, UNECE... National Institutes of Statistics)
  - TSG2 Country Representatives to integrate data not available from public sources/validate outcome
  - Current base year 2017 to be updated to 2022/2023 or 2024 depending on latest year available data

## **Characteristics of the transport system infrastructure**

- Considering infrastructure parameters monitored as part of the ETC studies
- Focussing on core-extended core networks and core (and possibly comprehensive) transport nodes, as well as urban nodes belonging to the ETCs
- Parameters to be collected from ETC/EMS or TCT studies or publicly available sources in first instance
  - TSG2 Country Representatives to integrate data not available from public sources/validate outcome

## **Performance of the transport system (transport/traffic data as well as operational data, e.g. safety)**

- Transport data to be collected from publicly available sources, studies (Eurostat, UNECE, TCT...)
- Traffic counting data to be collected from sources already used to set up the EMTM in 2019
  - TSG2 Country Representatives to integrate data not available from public/known sources/validate outcome





# *Review planned investments and assess their impact on development of the AI Region transport system*

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## **Identification and review of planned investments**

- Based on ETCs common project list and TCT studies for all transport modes
- Focus on projects impacting on the indicators monitored as part of the ETC studies
  - TSG2 Country Representatives to integrate list of projects especially for infrastructure not monitored as part of the ETC/TCT studies

## **Assessment of impact of planned investments on the development of the AI Region transport system**

- Based on EUSAIR Multimodal Transport Model limited to rail and road transport
  - TSG2 Country Representatives to validate outcome

# *Confirming/updating main issues and opportunities towards improved connectivity in the AI Region*

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## **Confirming/updating main issues and opportunities towards improved connectivity**

- E-survey consultation involving at least TSG2 Country Representatives
  - To confirm/update the main issues and opportunities to improve interconnectivity in the AI Region
  - The survey concerns all transport modes
  - Survey questionnaire to be prepared based on outcome of the study

## **Monitoring progress in the implementation of the actions related to the Pillar 2 transport topics identified in the EUSAIR Action Plan**

- To be conducted as part of the E-survey if decided to be performed as part of this technical assistance

# *Exploring synergies with other initiatives*

## **Other EUSAIR governance projects**

- Stakeholders' Engagement Platform (StEP) - EUSAIR Stakeholders Engagement Point
  - e.g. Updating the EMPT/EMTM knowledge base
- Strategic Projects for EUSAIR (SP4EUSAIR) - Support to Development and Implementation of Strategic Implementation Formats
  - e.g. Development of a multimodal and interoperable railway system in the AI Region

## **Cross-pillar initiatives**

- Cross-pillar projects ongoing or planned for implementation to be eventually described in the Master Plan

## **Other regional and EU initiatives**

- Mutually exchange inputs and outputs with other organisations to ensure consistency and maximise complementarity of studies and analyses
  - ETC/EMS studies and work plans
  - TCT studies





# *Updating the EUSAIR Master Plan on Transport (EMPT)*

Work programme





EMPT



EMTM




TSG2

	02/2025	Autumn 2025	Winter 2026	Autum 2026	Winter 2027	06/2027
<b>Start of activities</b>		<b>Update the EMPT and EMTM Datasets</b> Socioeconomic Infrastructure Transport/Traffic Investments	<b>Update EMTP Sections 1 to 3</b> and mode related chapters' sections	<b>Update analysis of issues and opportunities</b> towards improved connectivity in the AI Region and <b>align EMTP with ETCs/EMS WPs and TCT Studies</b>	<b>Update EMTP Sections 4 and 5</b> and mode related chapters' sections (by Dec. 2026)	<b>Delivery updated EMPT and EMTM</b>
			<b>Update EMTM Base year and Baseline scenarios</b>	<b>Update EMTM long-term projects and TEN-T completion scenarios</b>		
	<b>22<sup>nd</sup> TSG</b>	<b>23<sup>rd</sup> TSG</b>	<b>24<sup>th</sup> TSG</b>	<b>25<sup>th</sup> TSG</b>		<b>26<sup>th</sup> TSG</b>
		TSG to be consulted to confirm and/or integrate dataset/sources	TSG to validate updated knowledge base	TSG to validate updated EMPT and EMTM scenarios	TSG to be consulted to update issues and opportunities by mode	TSG to validate updated EMPT and EMTM future scenarios
		<b>May-June 2025</b>	<b>October-December 2025</b>	<b>March/April 2026</b>	<b>May/June 2026</b>	<b>By Feb. 2027</b>

# *Next steps towards 23<sup>rd</sup> TSG (Autumn 2025)*

Task	Deadline	Responsibility
<b>Update the EMPT and EMTM Datasets</b>		
Review of publicly available data and statistics to update the EMPT and EMTM datasets	April 2025	Consultant
Consult TSG Country Representatives bilaterally on possible data gaps and with WB6/TCT on the TEN-T infrastructure to be considered in the EMPT	May-June 2025	Consultant
Feedback on data availability or national sources to be consulted on any possible data gap	June 2025	TSG Members

Contact list of TSG Members for study consultation/validation purposes to be provided by end of March 2025



# Thank you for your attention!

*Strategic project EUSAIR FACILITY POINT is co-funded by the  
European Union through the  
Interreg IPA ADRION Programme 2021-2027*



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