

## *Foreword*

Major international gateway and corridor infrastructures such as ports, airports and key rail routes are crucially important to the exports and imports of all the products and resources of modern-day economies. These infrastructures will become even more important in the future.

Following a brief recovery in economic growth rates at OECD and world level, at the time of writing global activity has slowed again and the near-term economic outlook is for very weak growth. However, over the longer term to 2030, modest but sustained growth is expected in developed countries and significantly higher growth in the major developing countries. International passenger and trade demand are likely to see strong growth as well.

As a result, rapidly increasing volumes can be expected, particularly along major trade and transport corridors between the largest regions, i.e. Asia (China, India), Europe and North America. Aviation and maritime services will carry most of the long-distance traffic, with ground handling likely to remain heavily concentrated at the major international gateway airports and ports.

This volume looks in particular at whether gateway ports, hubs and their inland transport connections are up to the demanding tasks ahead. Case studies explore the opportunities and challenges and help identify the pertinent key issues. Much of this infrastructure will require improved capacity to handle volumes two or three times current levels, not to mention the largest passenger aircraft and container vessels in use by 2030. Improved funding and financing arrangements will be needed in many countries, given their current deficit and debt levels and other expected demands on budget resources.

The report proposes a set of policy options to enhance the contribution of these infrastructures to economic and social development at home and abroad in the years to come. The options include recognition of strategic infrastructure (including gateways, hubs and key connections) in national policy frameworks and comprehensive measures to strengthen approaches and support the infrastructure development required.

The project from which this report is drawn followed on from previous OECD work on infrastructures to 2030, which addressed surface transport, energy, telecommunications and water infrastructures.

Funding and expert advice were provided by a steering group that included representatives from OECD member countries' Ministries of Transport, Mobility and Public Works, Environment and Energy, Sustainable Development and the Sea, as well as from other departments and agencies; non-OECD member economies (Chinese Taipei and India), international organisations (the European Investment Bank) and private enterprise. A full listing of steering group members is included in Annex A.

The OECD International Futures Programme team managed the project, which was undertaken in consultation with the OECD/International Transport Forum and Joint Transport Research Centre, with OECD in-house and external experts participating as appropriate (see also Annex A). The project explored the future opportunities and challenges facing some key gateway areas, inland hubs and their inland connections. A case study approach was taken to help “drill down” to assess the opportunities and challenges related to infrastructure; case studies were chosen following discussions with the steering group members. Workshops were undertaken to ensure input from local experts and to allow discussion and more detailed consideration of the assessment results.

The workshops were generally hosted by the country ministry principally involved and attended by participants from the relevant ministries of other countries as well as the OECD International Futures Programme project team. The purpose of these workshops was to allow the project to focus on several key aspects: the current situation in relation to gateways, inland transport and transit traffic; expected future growth and development; the infrastructure planned and related funding and financing arrangements; and opportunities and challenges related to the current and forecast positions.

The case study workshop report topics were:

- Northwest European Gateway Area – Port of Rotterdam;
- Turkey Bosphorus Area – Istanbul Marmara, Mersin and Nabucco;
- “High North”/Barents Area – strategic infrastructure in Finland and Sweden;
- France’s gateway ports – Le Havre, Marseille;
- Denmark – Greater Copenhagen Area;
- Austria/Switzerland – inland hubs;
- India – Mumbai Gateway Area, JNPT and other ports.

These case studies are available on the OECD International Futures Programme website at [www.oecd.org/futures/infrastructure](http://www.oecd.org/futures/infrastructure), and may be viewed individually by clicking the individual web links.

Workshop reports include background and factual material (e.g. on national policy settings and investment programmes) provided by the host ministries, agencies and workshop participants. Each report includes an assessment prepared by the OECD International Futures Programme project team of the opportunities and challenges facing the gateway area or inland hub and their international and inland transport connections.



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