

Strategie der Europäischen Union für die Donau Makro-Region

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Clubabend des OWWF Bayern
Bayerischer Landtag – Maximilianeum
München, Nov 14 2017

Macro Danube Region Business Week 2017 (DMRBW2017) fand in Wien und Linz (www.dmrbw.net) und das 6. EU-Donaustrategieforum 2017 in Budapest statt. Reflektionen der Ergebnisse beider Veranstaltungen reflektieren und Schlussfolgerungen für unsere Aktivitäten.



1. Einleitung
2. Veränderungen der Globalen Landschaft
3. Neue Wege der Regionalen Zusammenarbeit
4. EU Strategie Donauraum (EUSDR)
5. Transport & Logistik
6. Supply Chain Design
7. Globale Herausforderungen
8. Zusammenfassung
9. Anlagen

Wochen Übersicht DMRBW2017

Monday, October 2nd 2017, Hofburg/SECI, Vienna



CONFERENCE DAY 1

<http://www.danubeforum.org/>

ECOLOGY & ECONOMY | Why Paris is part of the Danube Region - The Next Steps

Tuesday, October 3rd 2017, WKO, Vienna



CONFERENCE DAY 2 (conference language: GERMAN)

<https://www.wko.at/service/Veranstaltung.html?id=b4421bff-bfdc-4c08-9625-8684dfbd5d05>

FORUM | Export in the Danube Region



Wednesday, October 4th 2017, Linz



CONFERENCE DAY 3 (limited number of participants)

<https://www.dmrbw.net>

BUSINESS DIALOG | Logistics & Infrastructure | Technologies & Capabilities



Wednesday, October 4th 2017, Linz



voestalpine Stahlwelt



CONFERENCE DAY 3 (by invitation only)

<https://www.dmrbw.net>

Evening Dinner Reception | voestalpine Stahlwelt

Thursday, October 5th 2017, Linz



CONFERENCE DAY 4 (limited number of participants)

<https://www.dmrbw.net>

BUSINESS DIALOG | Supply Chain Design & Finance | Processes & Application

SITE VISIT | voestalpine Stahlwelt



Thursday, October 5th 2017, Vienna



CONFERENCE DAY 4 (by invitation only)

<https://www.dmrbw.net>

Evening Dinner Reception | Austrian Purchasing Association (BMOE)

Annual Event 2017, Vienna (tba)



Friday, October 6th 2017, DA, Vienna

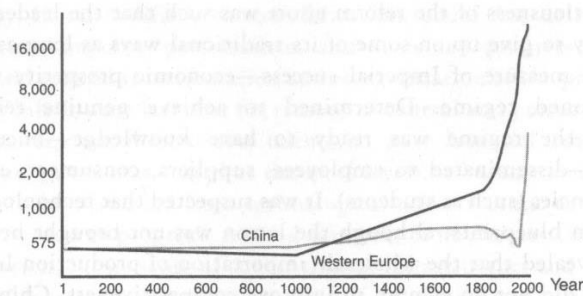


CONFERENCE DAY 5

<http://www.danubeforum.org/>

SMART DANUBE REGION | Economy & Entrepreneurship in the Danube Region

Der Aufstieg des Drachen



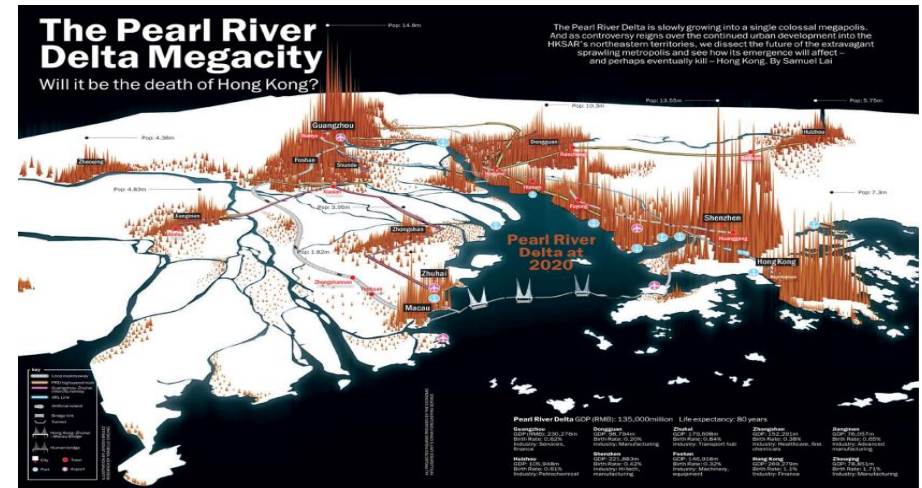
Source: Figure 1 (p. 42): GDP per capita: China and Western Europe: 1–1998 A.D. in Maddison, Angus (2001), The World Economy: A Millennial Perspective OECD. Copyright, OECD 2001.

Exhibit 2-1 GDP per Capita (in 2002 Dollars): China and Western Europe: 1–1998 A.D.

Relative Certainties in the 2025 Global Landscape

- Emerging of a global multipolar (oligopolar) world
- Shift of wealth and power from West to East
- US will remain the single most powerful but less dominant
- Continued economic growth and 1,2 billion more people will put pressure on energy, food and water resources

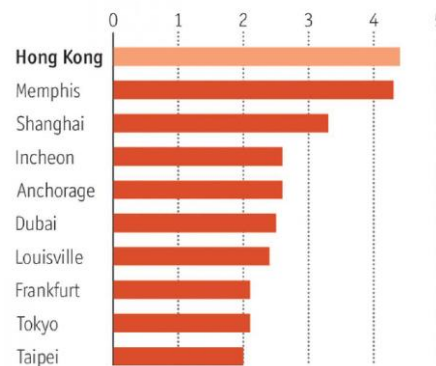
(NIC 2008/US Government Printing Office)



World infrastructure champions

Busiest airports

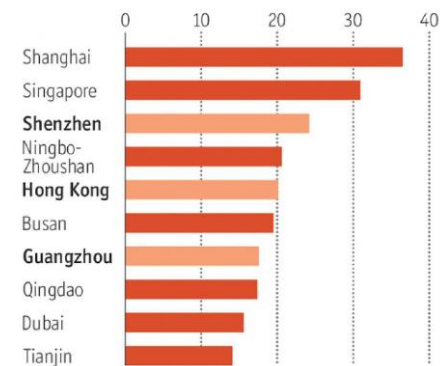
By freight and mail, tonnes m, 2015



Sources: Airports Council International; Marine Department of Hong Kong

Busiest container ports

TEUs*, m, 2015



*20-foot standard container equivalent

Entwicklung Globaler Materialströme

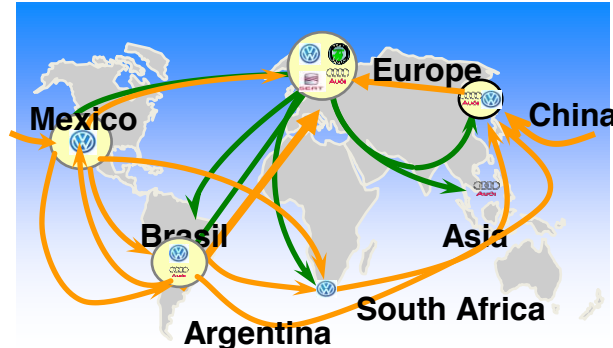
Transport Volumen

1998



Total 110.000 TEU
6 main trades

2007



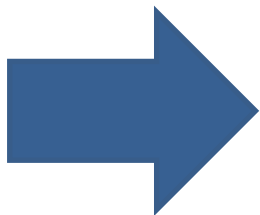
Total 125.000 TEU
18 main trades & cross trades

2012ff.



Total >140.000 TEU
21 main trades & cross trades

Entwicklung zusätzlicher Handelsverbindungen



- Südafrika
- Indien
- Zentralasien
- Russland
- Malaysia
- Mittlerer Osten

**Erhöhte Supply Chain
Komplexität durch zusätzliche
Handelsströme**

Sources: Factfinding CVI/NAPs in March 2008 and WTO April 7th 2011

Neue Wege Regionaler Zusammenarbeit

Baltic Region (2009)

- Denmark
- Sweden
- Finland
- Estonia
- Latvia
- Poland

- Mecklenburg
- Brandenburg

- 71 Mio. Inhabitants
- 1375 bn EUR GDP

- Norway
- Russia
- Belarus

Danube Region (2011)

- Romania
- Bulgaria
- Hungary
- Slovenia
- Slovakia
- Czech Republic
- Austria
- Bavaria
- Baden Württemberg

- 89 Mio Inhabitants
- 1620 bn EUR GDP

- Bosnia & Herzegowina
- Croatia, Serbia
- Moldova, Montenegro
- Ukraine

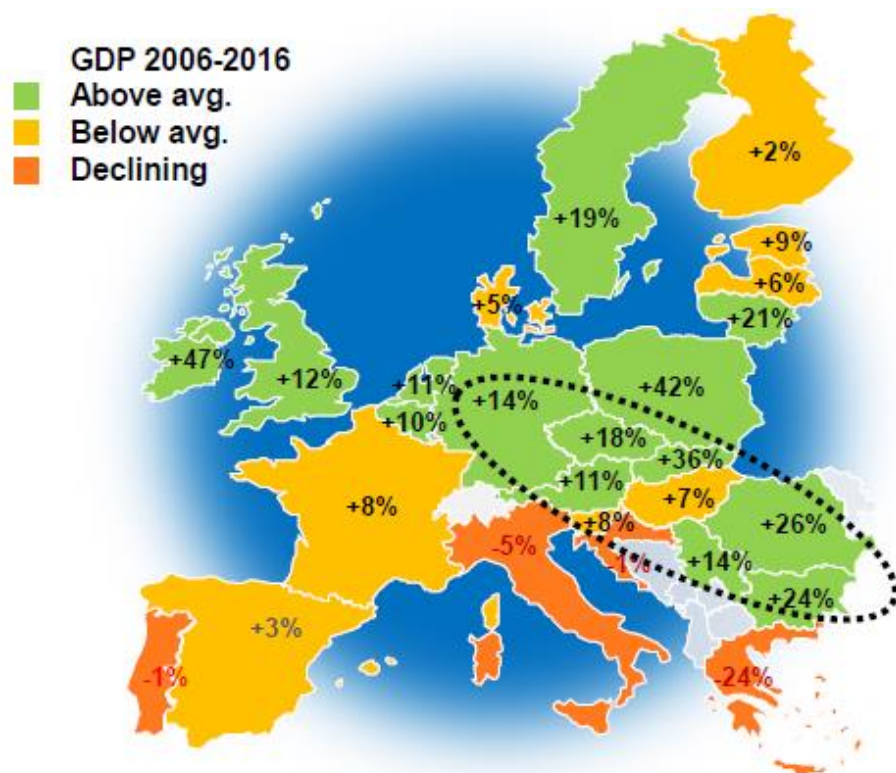
Gulf Region (2010)

- *Bahrain*
- *Kuwait*
- *Oman*
- *Qatar*
- *Saudi Arabia*
- *UAE*

- *42 Mio. Inhabitants*
- *917 bn USD GDP*

- *Arab League*
- *Iran*

Rückblick 2006-2016



Prognose 2017-2019

	2017	2018	2019
Romania	4.0	4.0	4.0
Kosovo	3.9	3.8	3.7
Albania	3.5	3.9	4.0
Hungary	3.3	3.4	3.1
Slovakia	3.1	3.6	3.9
Macedonia	3.1	3.3	3.0
Montenegro	3.1	2.9	3.3
Bulgaria	2.9	3.1	3.3
Poland	2.9	3.0	3.1
Slovenia	2.9	2.9	3.0
Croatia	2.8	2.9	3.0

	2017	2018	2019
Bosnia and Herzegovina	2.8	3.0	3.1
Serbia	2.8	3.0	3.3
Lithuania	2.7	2.8	3.1
Latvia	2.5	2.7	2.8
Ukraine	2.5	3.0	3.0
Czech Republic	2.4	2.6	2.3
Estonia	2.2	2.3	2.4
Turkey	2.1	2.6	3.1
Kazakhstan	2.0	3.0	3.0
Russia	1.7	1.7	2.0
Belarus	0.5	1.6	2.2

Forecast: wiw (March 2017).

© wiw

EU Strategie Donaauraum (EUSDR)

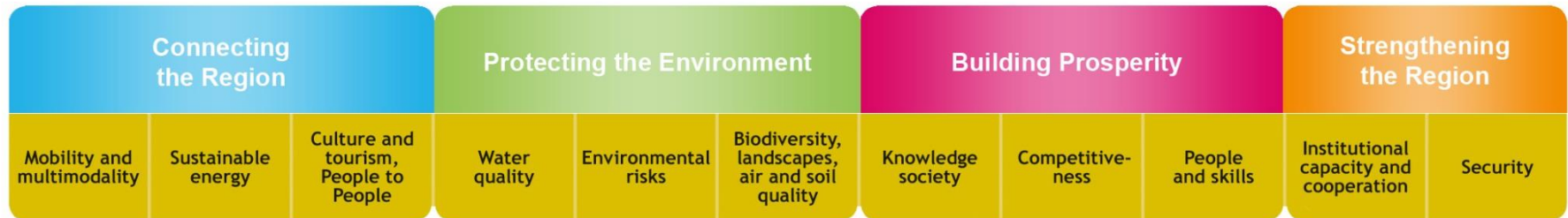
Strategy

addresses these various topics through
4 pillars
11 priority areas,
and of course actions and projects

Definition

Macro Region not yet determined
by Policy and „Völkerrecht“
Aim is to support
practical application of territorial
cohesion on transnational level

THE FOUR PILLARS



11 priority areas, coordinated by a priority area coordinator

Actions

Projects

EU Strategie Donaauraum (EUSDR)

<i>Priority Area</i>	<i>Countries in charge of coordination</i>
<i>P1 Mobility and intermodality</i>	<i><u>Inland waterways:</u> Austria, Romania <u>Rail, road and air:</u> Slovenia, Serbia</i>
<i>P2 More sustainable energy</i>	<i>Hungary, Czech Republic</i>
<i>P3 Culture and tourism, people to people</i>	<i>Bulgaria, Romania</i>
<i>P4 Water Quality</i>	<i>Hungary, Slovakia</i>
<i>P5 Environmental risks</i>	<i>Hungary, Romania</i>
<i>P6 Biodiversity, landscapes, quality of air and soils</i>	<i>Germany (Bavaria), Croatia</i>
<i>P7 Knowledge society (research, education and ICT)</i>	<i>Slovakia, Serbia</i>
<i>P8 Competitiveness of enterprises</i>	<i>Germany (Baden-Württemberg), Croatia</i>
<i>P9 People and skills</i>	<i>Austria, Moldova</i>
<i>P10 Institutional capacity and cooperation</i>	<i>Austria (Vienna), Slovenia</i>
<i>P11 Security and organised crime</i>	<i>Germany, Bulgaria</i>

U.S. Logistik Kosten und Kapazitäten

		\$ Billions
Carrying Costs - \$ 1.965 Trillion All Business Inventory		
Interest		47
Taxes, Obsolescence, Depreciation, Insurance		252
Warehousing		122
	Subtotal	420
Transportation Costs		
Motor Carriers:		
Truck - Intercity		460
Truck - Local		220
	Subtotal	680
Other Carriers:		
Railroads		63
Water	(International 33 Domestic 6)	39
Oil Pipelines		10
Air	(International 16 Domestic 24)	40
Forwarders		32
	Subtotal	184
Shipper Related Costs		8
Logistics Administration		52
	TOTAL LOGISTICS COST	1,344

US Network Capacity/Miles

>1 Mio/Highways

> 100.000/Railways

> 10.000/Inland Waterways

> 1 Mio/Pipelines

Volume & Value daily

50 Mio Tons

30 Mrd USD Value
25 % of global GDP

U.S. Logistics Costs <10 % of GDP
Railway Costs app. 0,5 % of GDP, Intermodal 0,1 % of GDP

Supply Chain Development consists out of **Supply chain architecture decisions**:

- decision whether to **make or buy a component**
- sourcing decisions: **which companies to include in the supply chain**
- contracting decisions: **structuring relationships among supply chain members to determine who in the chain performs which task.**

Logistics and coordinating decisions include

- the inventory, deliveries and
- information systems to support ongoing operation of the supply chain.

The art is to **identify core competencies and to keep them in-house.** (be aware „Intel inside“)

3-Dimensional-Concurrent-Engineering – 3DCE

- Traditionally, product designers have thrown new products over the fence to the manufacturing guys. It took what it took to realize the design, often at huge cost penalties.
- This disadvantage was recognised and addressed by concepts like Concurrent Engineering and Design for Manufacturability.



Ideally the supply chain (chain of organizations, technologies and capabilities) is designed together with the product & manufacturing process.



***Recht herzlichen Dank für Ihr Kommen und dem
OWWF für die ausgezeichnete Vorbereitung.***

***Mit besten Grüßen auch von Dr. Erhard Busek,
würden wir uns freuen, wenn wir zu dem Thema
Donauraum näher zusammenrücken könnten.***

***Sie und der Freistaat Bayern spielen eine
wichtige Rolle.***

Dr. Ernst Schmied

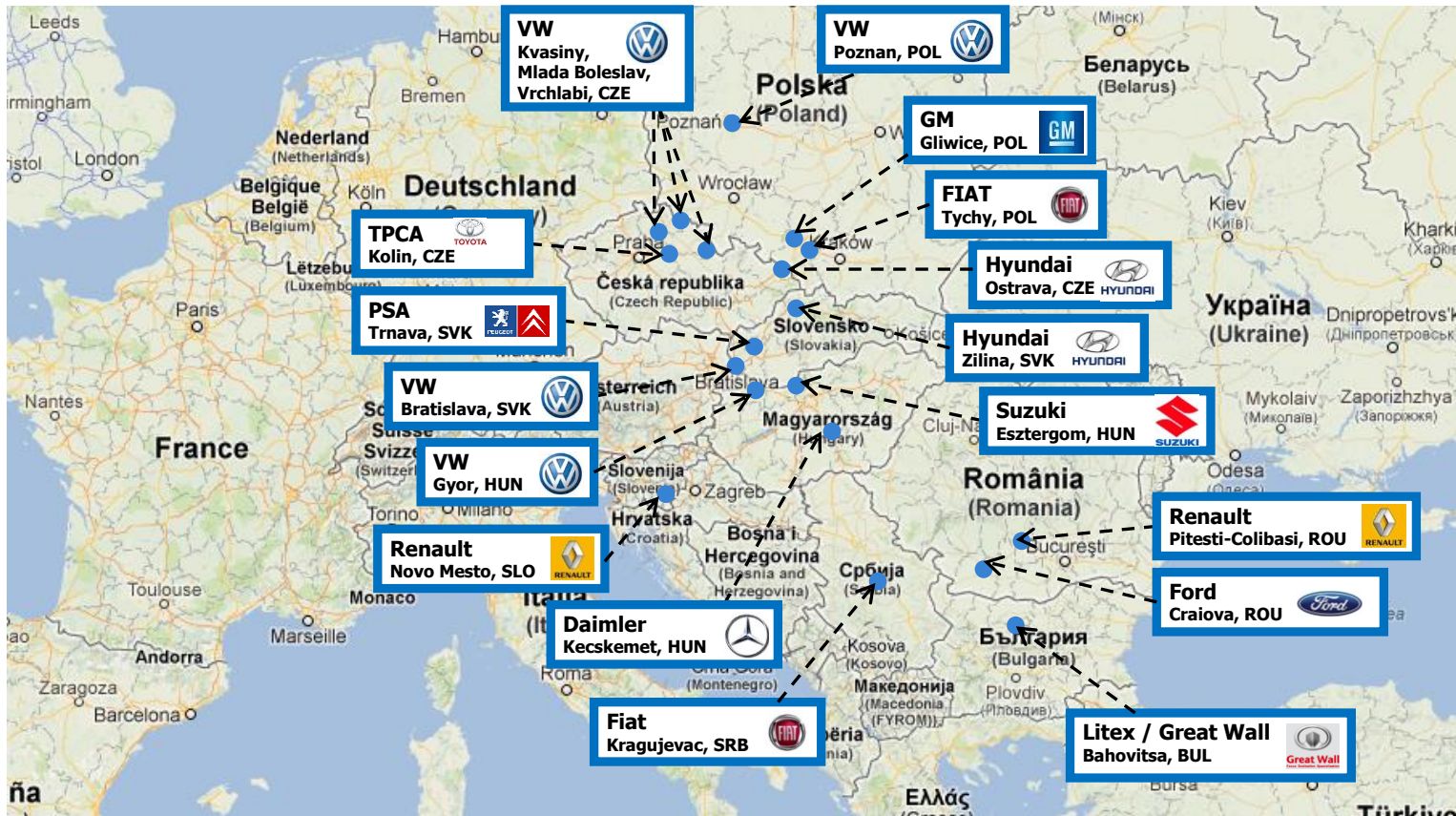
www.dmrbw.net
ernst.schmied@cvi-group.com
<https://www.linkedin.com/in/ernstschmied>

Anmerkungen und Positionierung aus Sicht der Metropolregion Nürnberg

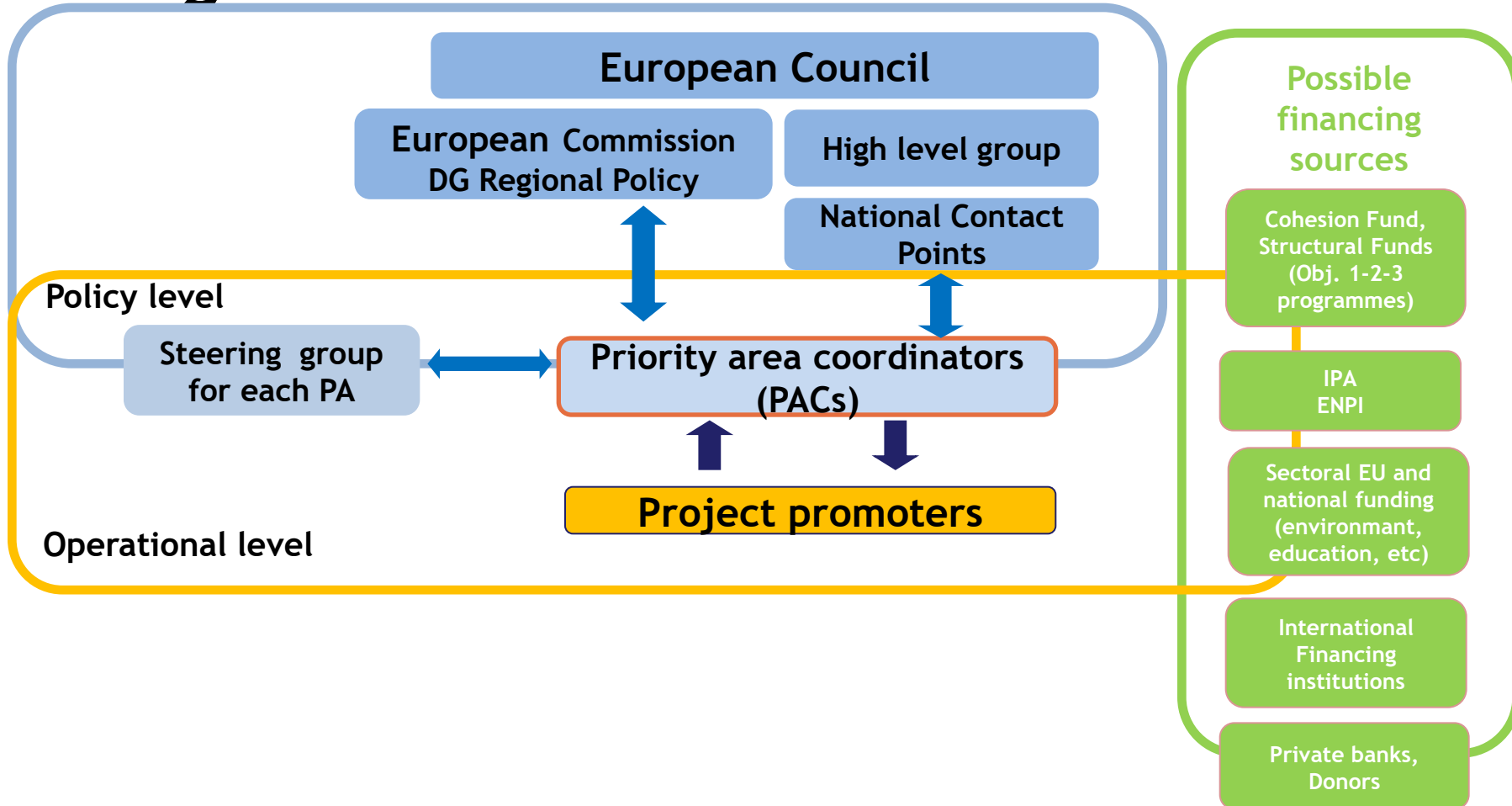
Die Europäische Metropolregion Nürnberg (EMN) sollte sich in die Entwicklung im Donaauraum, insbesondere unter folgenden Aspekten einbringen:

- Aktive Positionierung im Rahmen der Donaustrategie (Verkehr, Märkte, Tourismus, Umwelt)
- HUB-Funktion (Brückenkopf) zwischen West-Europa und Donaauraum wahrnehmen
- Entwicklungen im Rahmen der „Neuen Seidenstraße (OBOR)-Strategie“ gestalten

A1: Anpassung Fertigungskapazitäten



The governance model of the EUSDR



A3: Logistik Management in der EUSDR

- **LOGISTICS was NOT the Inventor of...but**
 - Containerisation & Multimodality
 - Integrators and Aircargo
 - Warehousing- and Material Handling
 - Packaging; one way & returnables
 - Internet and Real time
 - CIM incl. CAD/CAQ/CAM/Barcode/Rfid
 - Artificial Intelligence, Robots & 4.0

SEALAND
FEDEX
MANNESMANN
GE PLASTICS
INTEL/MICROSOFT
SAP/IBM
- **LOGISTICS is INTERCONNECTING** the core processes of R+D, Purchasing, Manufacturing and Sales (and Financing and HR) to exploit the Advantages
 - measured by**
 - Service levels
 - Capacity utilization of workforce & assets
 - Inventory levels
 - Logistics costs (direct and indirect)
 - managed by**
 - Macrologistics for mobility of societies
 - Micrologistics
 - Logistics enterprises
- **....All together have achieved over few decades**
 - Improvement of service levels including shortening time to market
 - Saving inventories/GDP by app 50 % and freeing cash plus stabilizing logistics costs

A4: Supply Chain Architektur

Why the Big Blue lost app. USD 100 bn in Market Cap ?

The power in the chain shifted to a horizontal structure and upwards in the chain, as the financial rewards. Here is what happened in the Supply Chain Architecture:

Vertical Structure (old)

Microprocessors
Operating systems
Peripherals
Application software
Network services
Assembled hardware

IBM	DEC	Bunch
IBM	DEC	
IBM	DEC	
IBM	DEC	
IBM	DEC	
IBM	DEC	
IBM	DEC	

Horizontal Structure (new)

Microprocessors
Operating systems
Peripherals
Application software
Network services
Assembled hardware

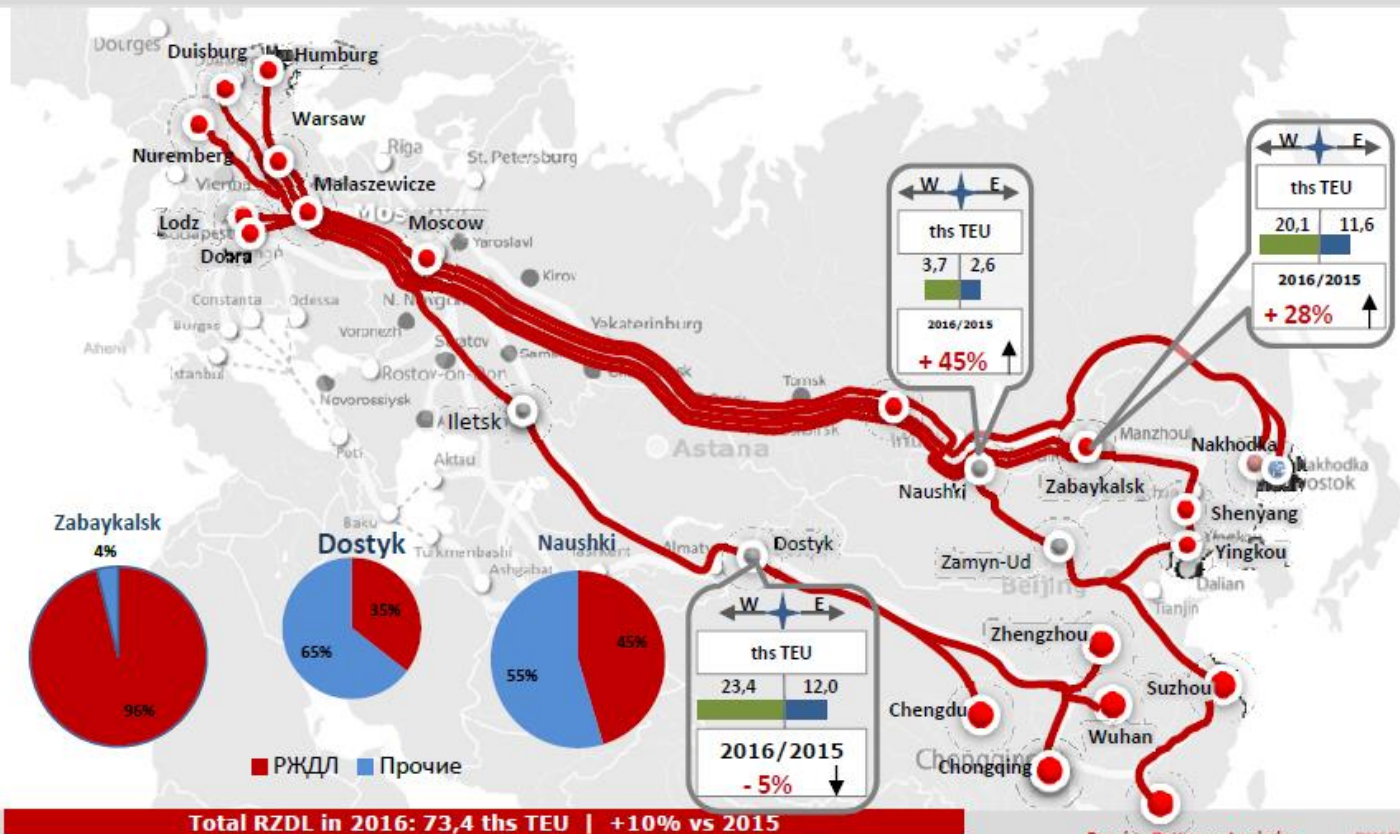
Intel			Moto	AMD	etc.
Microsoft			Apple	Unix	
HP	Epson	Seagate	etc.	etc.	
Microsoft		Lotus	Novell	etc.	
DEC	HP	IBM	EDS	etc.	
HP	Compaq	IBM	Dell	etc.	

A5: Neue Seidenstraße und EAEU

Container transit China-EU-China 2016



Russian Railways Logistics



Russian Railways Logistics

РЖД Логистика

