

The Mediterranean transport reality – the EU ports perspective

Lieselot Marinus

**Policy advisor
European Sea Ports Organisation**

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Summary

1. EU ports – diversity
2. Maritime transport evolutions in the Med
3. EU transport and ports policy
4. Conclusions



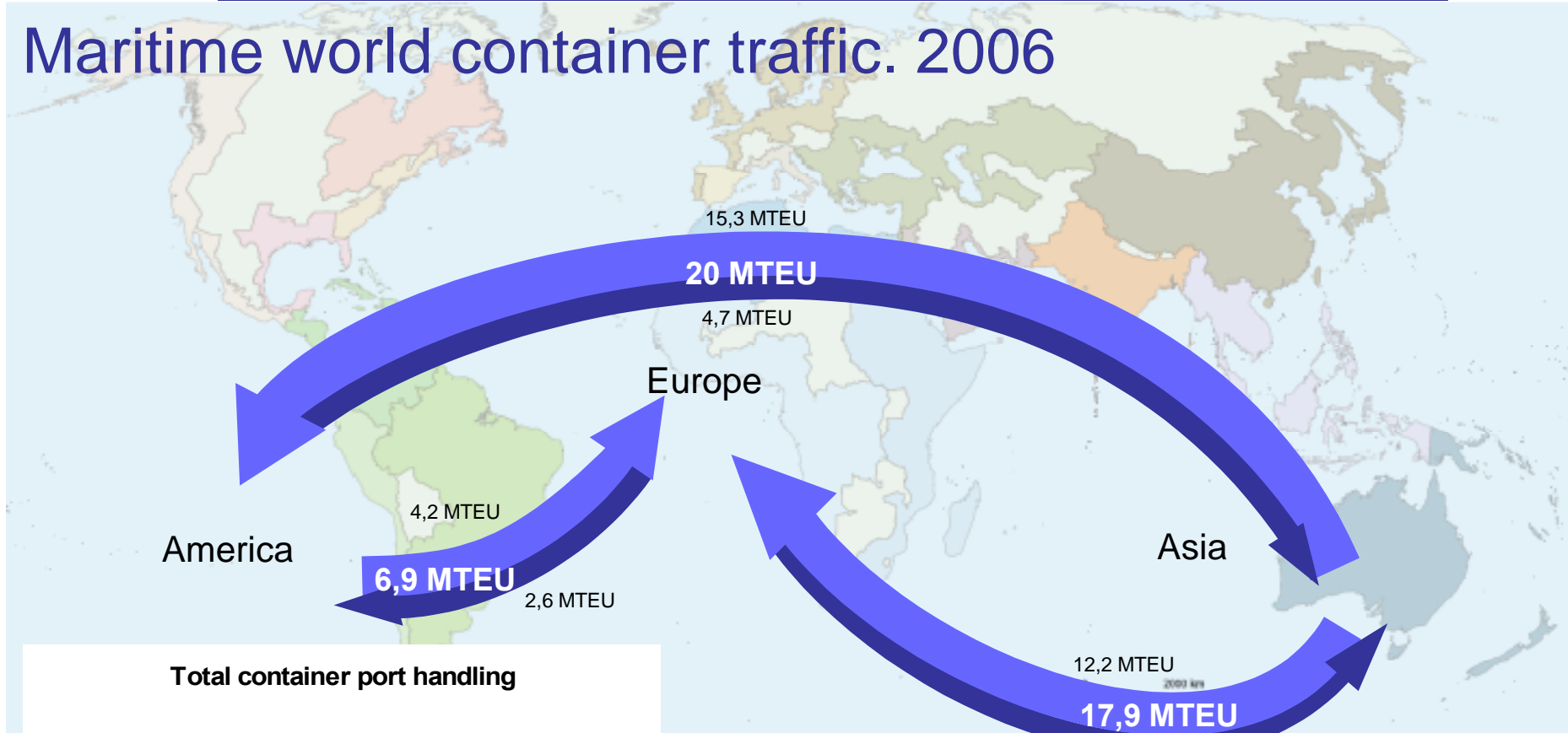
1. EU ports – diversity

- EU has 27 Member States of which 22 have seaports
- Coastline of 70,000 km along two oceans and four seas
- Approximately 1200 commercial seaports:
 - 700 ports handle less than 1 million t per year
 - 10 ports handle more than 50 million t per year

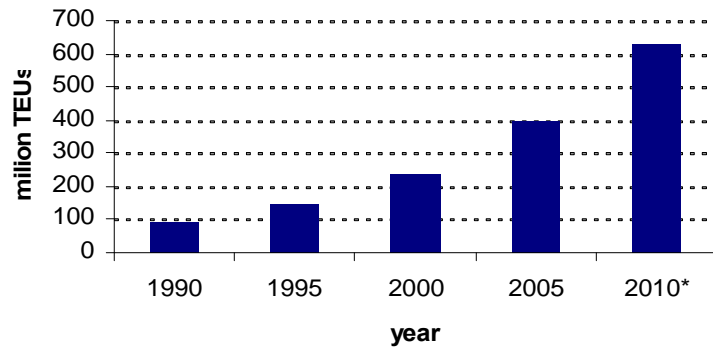


2. Maritime transport evolutions in the MED

Maritime world container traffic. 2006

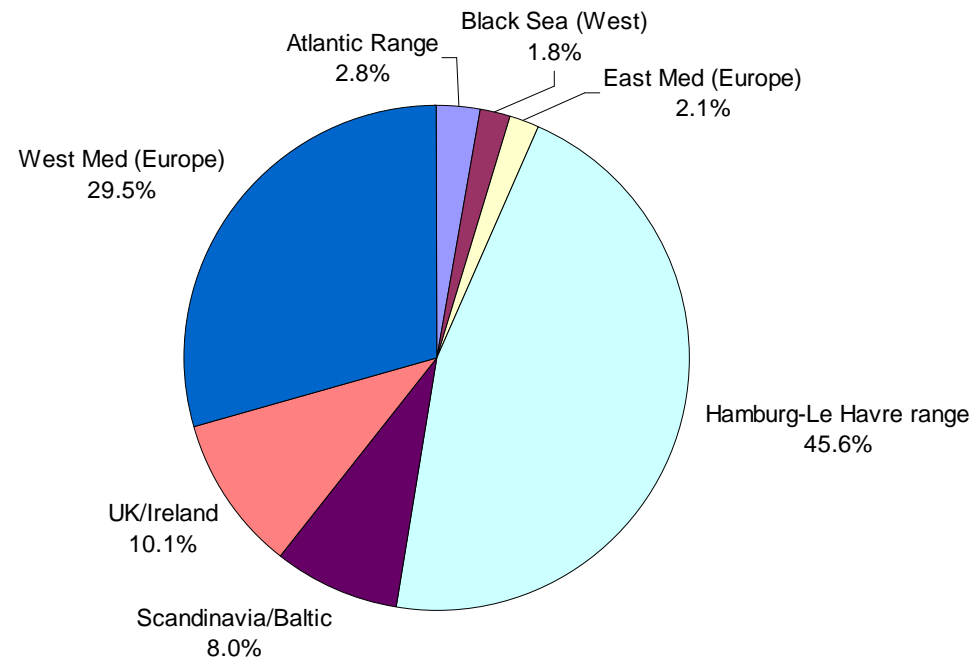


Total container port handling



Market shares of port region in Europe (containers)

Market shares of port regions in Europe based on container throughput in TEU (2007)



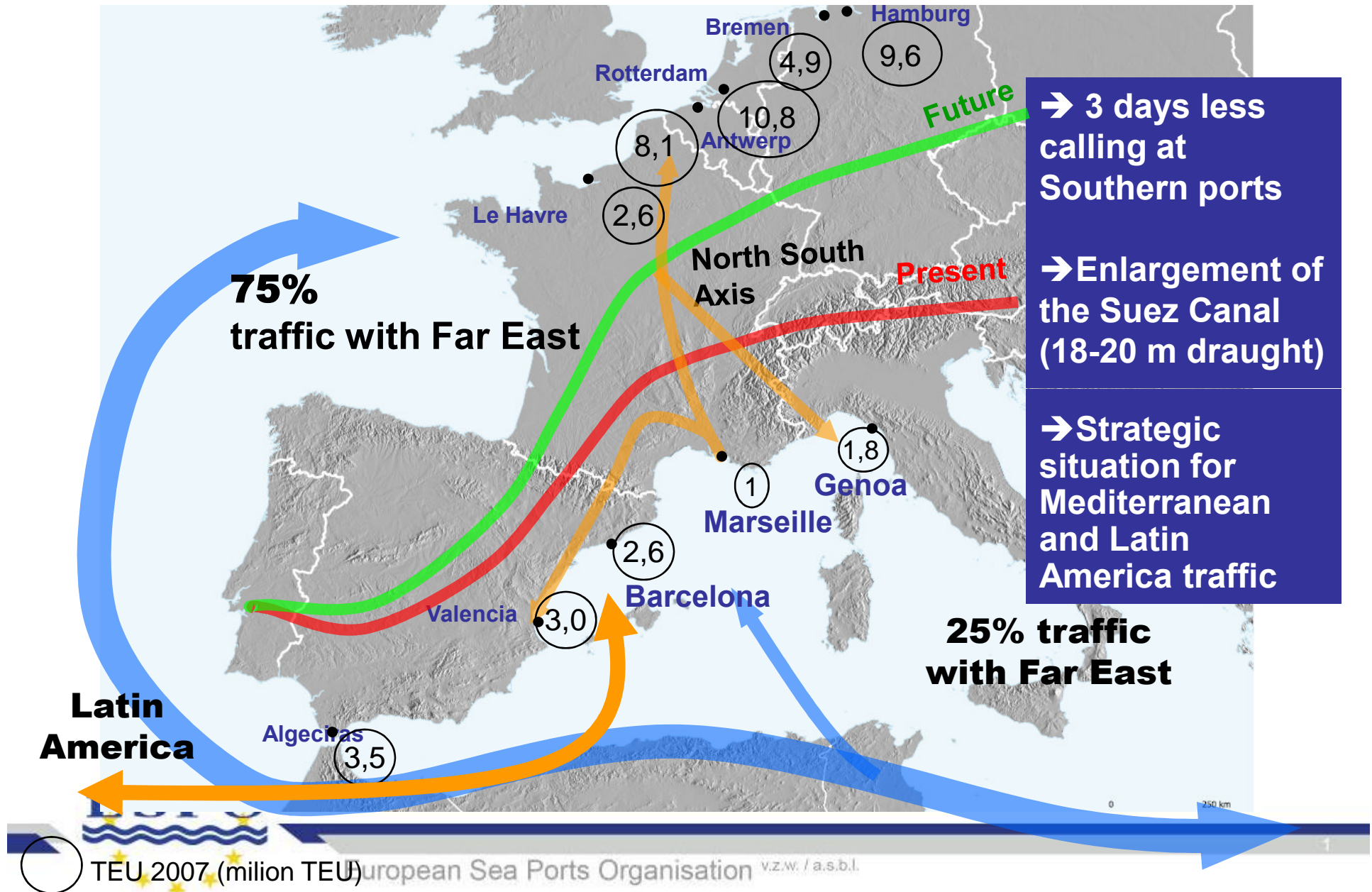
Strongest growers in TEU, 2006-2007

(ports with a growth of more than 100,000 TEU)

Port	Country	2006	2007	Growth in TEU
Antwerp	Belgium	7.018.799	8.176.614	1.157.815
Rotterdam	Netherlands	9.690.052	10.790.604	1.100.552
Hamburg	Germany	8.861.804	9.889.792	1.027.988
Gioia Tauro	Italy	2.938.176	3.445.337	507.161
Le Havre	France	2.137.828	2.638.000	500.172
Bremen/Bremerhaven	Germany	4.449.624	4.912.177	462.553
Valencia	Spain	2.612.139	3.042.665	430.526
Marsaxlokk	Malta	1.435.000	1.900.000	465.000
Southampton	United Kingdom	1.500.306	1.900.000	399.694
Constantza	Romania	1.037.068	1.411.370	374.302
Zeebrugge	Belgium	1.653.493	2.020.723	367.230
Barcelona	Spain	2.317.368	2.610.037	292.669
Felixstowe	United Kingdom	3.080.000	3.300.000	220.000
St-Petersburg	Russia	1.449.958	1.664.539	214.581
Genoa	Italy	1.657.113	1.855.026	197.913
Algecras	Spain	3.256.776	3.414.345	157.569
Gdynia	Poland	451.170	614.373	163.203
Las Palmas	Spain	1.311.958	1.453.286	141.328
Kotka	Finland	452.401	570.881	118.480
Thessaloniki	Greece	343.727	447.211	103.484
Tilbury	United Kingdom	742.679	843.808	101.129



Opportunities for Mediterranean ports



3. EU transport and ports policy



EU Transport Commissioner Jacques Barrot opens the consultation on a new European ports policy at the annual conference of ESPO - Stockholm, 2 June 2006

- Two proposals for Directive on market access to port services failed
- Now: EU ports policy – Freight logistics policy – changes in transport policy



EU ports policy communication

- State aid guidelines
- Concessions
- Environmental guidelines
- Hinterland connections/infrastructure bottlenecks
- Inventory of issues with neighbouring ports to EU
- Safety and security

Freight logistics package

- Customs code reform
- European maritime space without barriers

Changes in transport policy

- TEN-T mid-term review
- Co-modality
- Internalisation external costs



Focus on logistics chains – hinterland connections



EU port policy and freight logistics policy recognise role of ports as nodal points

Challenges for ports

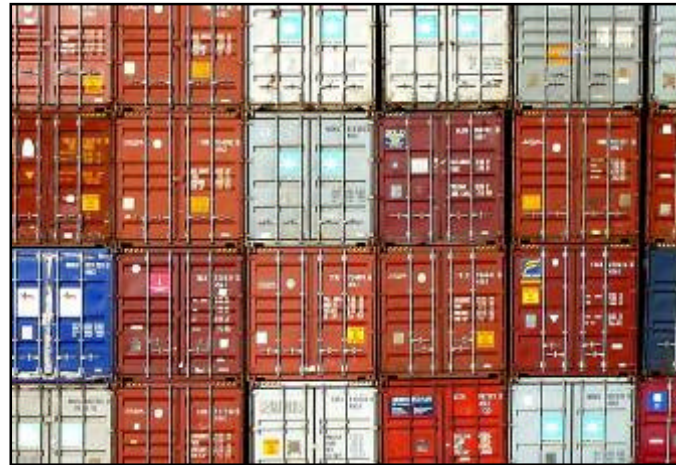
- Ports are key elements in value-driven logistics chain systems, this offers substantial network possibilities
- This also poses numerous coordination problems – port authority should play more its role as facilitator/mediator
- Solve infrastructure bottlenecks

Way forward

- TEN-T mid-term review 2010 focus on hinterland connections of ports
- ESPO set up Platform with inland ports (EFIP), increase dialogue with all transport modes
- EC logistics bottleneck exercise



Concessions



EU port policy gives some guidance on concessions in ports – Horizontal Directive on concessions (?)

Challenges for ports

- Powerful and footloose actors control freight from origin to destination
- Global groups invest and operate terminals in several ports worldwide
- These actors and groups have strong bargaining power
- Concessions as governance tools to increase port performance

Way forward

- ESPO internal survey on current use of concessions and possible best practice

State aid guidelines



EU port policy communication announces State aid guidelines to ports and more transparency of accounts

Challenges for ports

- Mix of public and commercial activities in a port
- Level playing field
- Clarity for investors, operators and users

Way forward

- Port sector has been asking for guidelines for years – EC to organise consultation meeting in Autumn 2008
- Legislation on financial transparency of port accounts



Environmental guidelines



EU ports communication announces guidelines on the application of EU environmental legislation to port development (mainly Birds and Habitats Directives)

Challenges for ports

- Ports experience a very strong growth in traffic
- Port expansion creates ecological and societal pressures
- Expansion plans lack behind because of delays
- Need for more legal certainty towards investments

Way forward

- ESPO very much involved in preparation environmental guidelines – expected Autumn 2008



Safe and secure operations in ports



Third maritime safety package, supply chain security initiative (?), AEO

Challenges for ports

- Traditional role of a port is to provide a 'safe haven' to ship, crew and cargo
- Role of ports when accidents: places of refuge
- Port security rules implementation : ISPS, Port security Directive, port access identification card (?), 100 pct scanning (?)
- Make port areas attractive and accessible

Way forward

- Maritime safety package 2nd reading in EP (shortly)
- Security discussions at EC



Modernisation



EU freight logistics package announces

- Internal market for intra-EU shipping (no administrative formalities)
- Reform of EU Customs Code
- Use of electronic procedures

Challenges for ports

- High administrative burden for maritime transport compared to road transport
- Compatibility of systems
- IT investments for smaller ports

Way forward

- Legislative proposal on European maritime space expected in Autumn 2008



4. Conclusions

- The challenges of European ports are not substantially different from ports elsewhere in the world
- The supra-national policy level of the EU however has a significant influence on the development and governance of European ports
- Success of a port depends on the ability to integrate the port effectively into the networks of business relationships that shape supply chains (nodal points – moderators)
- Fully exploit synergies with other transport nodes: efficient capacity utilization – efficient operational synchronisation



Thank you for your attention



Lieselot Marinus

European Sea Ports Organisation (ESPO)

Treurenberg 6 – B-1000 Brussel / Bruxelles - Tel + 32 2 736 34 63 – Fax + 32 2 736 63 25

Email: Lieselot.Marinus@espo.be – www.espo.be

