Port performance dashboard 2013

ESPO Conference 2013, Varna, 31 May

Patrick Verhoeven, Secretary General, ESPO
ESPO perspective

- Clear commitment to transparency
- Evidence of progress adds credibility to the sector
- Long reporting tradition in some areas (environment - EcoPorts, governance – fact finding surveys)
- Need for a more comprehensive approach
The PPRISM project

- 2010-2012
- Commissioned by DG MOVE, led by ESPO
- Aim: Develop a set of performance indicators in 5 categories (market trends, socio-economic performance, logistics, governance, environment)
- ITMMA, University of Aegean, Vrije Universiteit Brussel, Technical University of Eindhoven, Cardiff University
Port Performance Dashboard 2012

European Port Performance Dashboard

Port activities and port community stakeholders share a common ambition: to improve the efficiency and competitiveness of European ports. The European Port Performance Dashboard is a tool to measure and communicate the performance of European ports in an accessible and user-friendly format.

How can port authorities contribute?
Port authorities can contribute by participating in the next round of data collection. This will provide valuable insights for decision-makers and help to improve the performance of European ports.

Benefits of participation to the port authority:
- Gain recognition as having contributed to the dashboard data provided in a consistent and comparable way.
- Increased visibility of port performance.

Snapshot of the EU Port System
Ownership of port authorities

Involvement of PA in actions and initiatives that benefit the entire port community

Economic objectives of port authorities

EU port authorities converge towards the ‘facilitator’ type

"With the current economic and institutional environment being characterised by high levels of uncertainty and complexity, there is a need for more robust and transparent governance models. This is why the need to identify and monitor particular aspects of the governance models is essential for their effectiveness and impact on performance."

George Efstathiou, Executive Director of Hellespont Port Association

Autonomous Management

Integration of Port Cluster

Reporting Corporate and Social Responsibility

Direct provision of operational services

Source: ESPO Port Performance Dashboard 2012
Port Performance Review 2013

★ Keeping momentum and retaining the initiative
★ Repeating the data collection exercise on the set of PPRISM indicators
★ Further test and validate the indicators
★ Identify trends
★ Transitional period, existing limitations (e.g. sample of respondent ports)
Sample of 49 ports (4 categories)
Volume category

- More than 50 million tonnes per year: 14.3%
- 25 to 50 million tonnes per year: 26.5%
- 10 to 25 million tonnes per year: 18.4%
- Less than 10 million tonnes per year: 40.8%
Port typology

- Port authority owned or controlled by local or regional government: 28.6%
- Port authority owned or controlled by national government: 49.0%
- National port administration (government agency): 2.0%
- Private port company: 4.1%
- Other (please specify): 16.3%
Maritime traffic

- 2012 Container volumes 30% higher than in 2005
- Conventional general cargo and dry bulk cargo strongly affected by 2009 crisis. Remain 10% lower than 2005 level.
- Liquid bulk initially not hit hard by the crisis, but volumes continue to shrink
Call size

- The average Call Size for the sample of European ports continues to stay at a low level after a dramatic fall in 2009
Direct employment

Ports that calculate and report direct employment on a yearly basis

In % of the number of respondents  In % of total European throughput

Data collection in 2011 (N=58)  Data collection in 2013 (N=57)
Direct employment (number in FTE, Europe, extrapolation)

- 2007: 1,800,000
- 2008: 1,600,000
- 2009: 1,400,000
- 2010: 1,200,000
★ Ports moving towards path of recovery
★ Based on extrapolation, smaller and medium sized ports are suffering more, and on a structural level from the economic downturn
   — Consolidation of port calls by shipping lines
   — Industrial activities hit very hard by the crisis
   — Linkages to EU rather than the world
Container Intermodal connectivity

- Container connectivity of the EU port system improves over time
- Based on PA data on number of weekly barge and train services to inland destinations
- 21 respondent ports represent 70% of intermodal volumes
Governance indicators

- Reporting corporate and social responsibility
  - On average, the PAs fulfil in 2012 7.68 out of the 10 criteria under question for the RCSR indicator (n=52).

- Integration of port cluster
  - On average, European PAs fulfil in 2012 7.49 out of 10 criteria of the IPC indicator (n=41)

- Autonomous management
  - On average, European PAs fulfil in 2012 7.83 out of 10 criteria of the AM indicator (n=41);
Environmental data collection through EcoPorts

- 79 ports, 21 countries
- Balanced sample in terms of size and geography
## Environment – top 10 priorities

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Port Development (water)</td>
<td>Garbage / Port waste</td>
<td>Noise</td>
<td>Air quality</td>
</tr>
<tr>
<td>2</td>
<td>Water quality</td>
<td>Dredging: operations</td>
<td>Air quality</td>
<td>Garbage / Port waste</td>
</tr>
<tr>
<td>3</td>
<td>Dredging disposal</td>
<td>Dredging disposal</td>
<td>Garbage / Port waste</td>
<td>Energy Consumption</td>
</tr>
<tr>
<td>4</td>
<td>Dredging: operations</td>
<td>Dust</td>
<td>Dredging: operations</td>
<td>Noise</td>
</tr>
<tr>
<td>5</td>
<td>Dust</td>
<td>Noise</td>
<td>Dredging: disposal</td>
<td>Ship waste</td>
</tr>
<tr>
<td>6</td>
<td>Port Development (land)</td>
<td>Air quality</td>
<td>Relationship with local</td>
<td>Relationship with local</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>community</td>
<td>community</td>
</tr>
<tr>
<td>7</td>
<td>Contaminated land</td>
<td>Hazardous cargo</td>
<td>Energy consumption</td>
<td>Dredging: operations</td>
</tr>
<tr>
<td>8</td>
<td>Habitat loss / degradation</td>
<td>Bunkering</td>
<td>Dust</td>
<td>Dust</td>
</tr>
<tr>
<td>9</td>
<td>Traffic volume</td>
<td>Port Development (land)</td>
<td>Port Development (water)</td>
<td>Port development (land)</td>
</tr>
<tr>
<td>10</td>
<td>Industrial effluent</td>
<td>Ship discharge (bilge)</td>
<td>Port Development (land)</td>
<td>Water quality</td>
</tr>
</tbody>
</table>
Environmental management index

Total index 7.25
Environmental management – positive trends over time!

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental Policy</td>
<td>45</td>
<td>58</td>
<td>72</td>
<td>86</td>
<td>+28</td>
</tr>
<tr>
<td>Policy available to public</td>
<td>-</td>
<td>59</td>
<td>62</td>
<td>82</td>
<td>+23</td>
</tr>
<tr>
<td>Policy aimed at compliance +</td>
<td>32</td>
<td>49</td>
<td>58</td>
<td>68</td>
<td>+19</td>
</tr>
<tr>
<td>Publishes Environmental Report</td>
<td>-</td>
<td>31</td>
<td>43</td>
<td>64</td>
<td>+33</td>
</tr>
<tr>
<td>Designated Environmental personnel</td>
<td>55</td>
<td>67</td>
<td>69</td>
<td>94</td>
<td>+27</td>
</tr>
<tr>
<td>Recognised EMS</td>
<td>-</td>
<td>21</td>
<td>48</td>
<td>64</td>
<td>+43</td>
</tr>
<tr>
<td>Environmental monitoring programme</td>
<td>53</td>
<td>65</td>
<td>77</td>
<td>79</td>
<td>+14</td>
</tr>
<tr>
<td>Performance indicators identified</td>
<td>-</td>
<td>48</td>
<td>60</td>
<td>64</td>
<td>+16</td>
</tr>
</tbody>
</table>

Source: Self Diagnosis Method (SDM) and ESPO surveys
Conclusions

★ Transitional period
★ Current limitations
★ Still the reporting on trends is feasible
★ Repetition of data collection and consistency on the sample of ports will ensure reliability
Way forward - PORTOPIA

★ PORTS OBSERVATORY FOR PERFORMANCE INDICATORS ANALYSIS

★ FP7 – SST.2013.6-2

★ 12 partner consortium, led by University of Brussels (VUB) – Department of Business

★ Consisting of universities, research institutes and industrial partners with a proven track record
Thank you for your attention!

Patrick Verhoeven, ESPO Secretary General

www.espo.be