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DELIVERABLE 5.1.
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DELIVERABLE 5.1.
Fact Finding report 2016

TABLE OF CONTENTS

1	INTRODUCTION	4
2	The History of the ESPO fact finding	5
3	The methodology applied	5
3.1	The questionnaire	6
3.2	The survey	7
4	Governance implementation in the PORTOPIA Service Cloud	8
5	Dissemination activities and material	9

DELIVERABLE 5.1.
Fact Finding report 2016

List of Figures

Figure 1: Respondents by country (tonnage- Eurostat database 2013 and number of core ports).8

1 INTRODUCTION

The present report is the first deliverable (D5.1) of PORTOPIA Work Package 5. Its objective is to present part of the work done in Tasks 5.1, 5.2 and 5.3. The aim of WP5 is to provide an updated picture of the port sector in terms of governance models and to develop concrete indicators. This objective has been achieved by undertaking a new edition of the ESPO Fact Finding survey on the governance of EU ports. This task started in September 2014 and ended in February 2015.

The work performed under these tasks consists of:

- The definition of a new approach taking into consideration the work done in previous editions and the work produced in PPRISM (<http://pprism.espo.be/>)
- The elaboration of a new fact finding questionnaire (see Annex 1)
- The survey launched to European port authorities
- The analysis of the resulting data and of the evolution over time of main aspects of port governance
- The elaboration of a new publication (please see Annex 2).

This deliverable has been prepared by the European Sea Ports Organisation (ESPO) (WP5 leader).

The publication “Trends in EU ports Governance 2016” is one of the outcomes of this work, and is available online¹.

It compiles key findings of the last ESPO Fact Finding Survey on the governance and organisation of EU ports. In addition to the latest trends in ownership, management and key functions of port authorities, this edition also looks at the role port authorities play in the energy transition, as home and key partners of industrial players, and at innovation and sustainability of port operations. This report is based on a web-based survey (See annex 1) that was sent directly to individual port authorities. 86 port authorities from 19 EU Member States, Norway and Iceland responded. Together, they represent more than 200 ports and more than 62% of the overall volume of cargo handled in the European Union.

In addition to the publication which only compiles selected findings, ESPO selected a number of aspects from the survey to create a more permanent platform to illustrate and monitor trends in the EU port sector. This is conceived as the Governance dimension of the Portopia IT platform which already contains other modules on port traffic data and environmental indicators, etc. This information will be included in Deliverable D5.2 will compile, as also a proposal for a set of governance indicators to be permanently monitored, including ICT requirements.

¹http://www.espo.be/media/Trends_in_EU_ports_governance_2016_FINAL_VERSION.pdf

Although an analysis and comparison of the evolution of port governance over time is crucial, it was not feasible to include this in the fact finding report 2016. There are two main reasons for this:

- The samples of the respondent ports of the surveys of 2010 and 2016 were very different;
- Thanks to the important contribution of the project, ESPO managed to improve the survey and the questions included in it. This resulted in more focused questions in comparison to the survey that was conducted in 2010.

Consequently, an analysis and comparison of the evolution of port governance over time would have been scientifically inappropriate for most sections of the Fact Finding report 2016. However, it was decided to include this analysis, when possible, directly in the PORTOPIA platform, once the Governance module is implemented. In fact, the platform will provide the possibility to assess port governance evolutions over time and to make regional comparisons throughout dashboards and data analysis tools.

A parallel exercise was developed for inland ports. The specific work on governance for inland ports will be detailed in deliverable D7.3.

2 THE HISTORY OF THE ESPO FACT FINDING

The 2015 edition of the ‘Fact Finding Report’ is the sixth in its kind. It builds on a tradition that finds its origin in the 1970s. The aim of these reports is to monitor port governance in Europe and its evolution over time.

In 1974, the European Commission created a working group consisting of 16 representatives (2 per Member State [MS]) later known as the ‘Community Port Working Group’. The aim was to create a better understanding of the ports’ institutional and administrative structure.

The working group had to analyse the existing situation (‘fact finding’) in terms of governance in the EU ports industry. Moreover, focus was given to the institutional and administrative structure, and a report containing summarized information was produced.

The information which was considered necessary concerned the organisational structure of ports, the division of responsibility between public and private bodies concerned in port activity, operational conditions of each port organisation, financial and taxation matters of each organisation and statistics currently provided by port authorities

The former editions took place in 1977, 1986 (11 MS), 1996 (17 MS), 2005 ‘Factual Report’ (ports package) and 2010.

3 THE METHODOLOGY APPLIED

3.1 The questionnaire

The initial plan to run the new fact finding survey through the PORTOPIA platform had to be modified in the fall of 2015. Resources and time allocation issues in terms of IT support made clear that a further serious delay would have had to be expected without modification of this initial plan. Therefore, the decision was taken to run the new fact finding through the same web tool used in the previous edition (surveymonkey.com) which was providing the tools for analysis as well. However, as part of Deliverable D5.2, a permanent data collection for governance is being defined and will be implemented in the PORTOPIA platform to ensure state of the art.

Concerning the questionnaire, for this edition we took as a basis the questionnaire of the previous edition which was prepared by Patrick Verhoeven, the Secretary General of ESPO at that time. It was decided to simplify and add new aspects of port governance that are very relevant at the moment and which were not explored in 2010. The different sections to be included in the questionnaire and the questions were discussed with the members of the relevant technical committees of ESPO, the Port Governance, the Sustainable Development Committees and the Legal Advisory Network. Several meetings during 2014 and 2015 were used to update and consult ESPO members on this exercise².

During the preparations it was decided to undertake the fact finding survey based on the following principles:

- Focus on giving continuity to the internal ESPO Fact Finding exercises. Three indicators had been proposed under PPRISM for the governance dimension. Those indexes were based in 10 questions each, most of them present in the ESPO fact finding surveys.
- Ensure to some extent the comparability of data between the 2010 and the 2015 editions of the Fact finding survey to produce trends over time.
- Simplify the questionnaire by reducing the number of questions and by redrafting some of the questions that had not been clear or had too theoretical approach in the 2010 edition.

²

- Port Governance and Legal Advisory Network committee meetings, Helsinki, 15 April 2015
- Port Governance committee meeting, Helsinki, 15 April 2015
- Port Governance committee meeting, Brussels, 30 June 2015
- Port Governance committee meeting, Sines, 29 September 2015
- Port Governance committee meeting, Brussels, 2-3 February 2016
- Sustainable Development committee and PORTOPIA workshop, Tallinn, 22-23 April 2015
- Sustainable Development committee meeting, Copenhagen, 6 October 2015

- Explore new aspects of port governance related to the new challenges of port authorities beyond its key role in transport. (e.g. Industry, warehousing and logistics, innovation, energy transition and sustainability, cruise and ferry, other activities, TEN-T status, etc.)

The questionnaire is provided in Annex 1. It had 160 questions structured in different sections. The following index provides an overview of the topics dealt with by the survey.

1. Introduction
2. Ownership of the port authority
3. Legal status of the port authority
4. Mission and goals of the port authority
5. Port authority organisation and management
6. Ownership of the land
7. Cargo handling terminals
8. Industry in the port
9. Warehouse and logistics in the port
10. Regulatory role and tasks
11. Port services
12. Community manager function
13. Internationalisation
14. Cruise and ferry
15. Energy in the port
16. Financial responsibilities of the port authority
17. Accounting practices and transparency
18. Port authority income
19. Taxation
20. Other activities/functions of the port authority
21. General port profile

3.2 The survey

The survey was launched by ESPO in November 2015 and sent directly to port authorities with an explanatory letter from ESPO, the questionnaire in pdf and also the link to the web-survey. An intensive follow-up of the participation took place from November to March 2016.

For the report and publication only completed questionnaires were used. 86 port authorities from 19 Member States, Norway and Iceland completed the questionnaire. Together they represent more than 200 ports and 62% of the EU cargo handled.

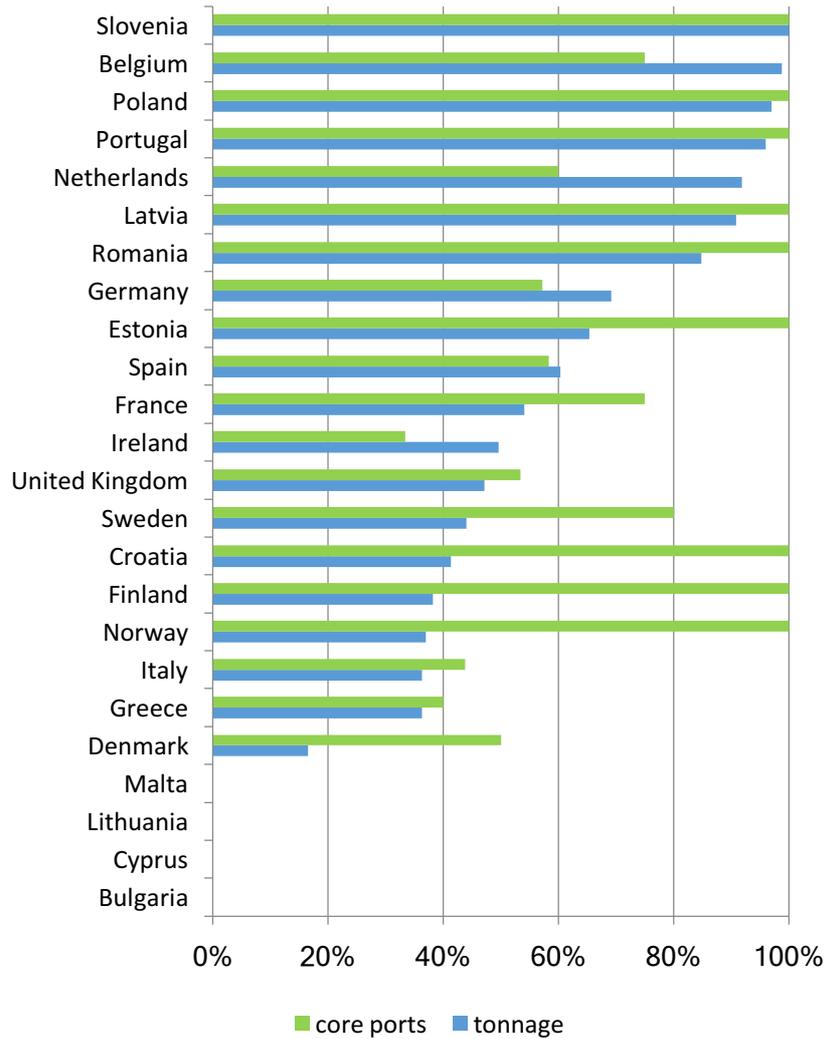


Figure 1: Respondents by country (tonnage- Eurostat database 2013 and number of core ports).

Four Member States did not contribute to the Fact Finding survey. These correspond to the single port authority Member States (Bulgaria, Cyprus, Malta and Lithuania) where one port authority manages all the ports of the country. Cyprus was in a process of changing the governance of their ports, therefore it was decided that they would contribute at a later stage to the permanent platform. There is the commitment that these countries will take part in the permanent platform. Since they submitted a response to the previous edition of 2010 and their governance has not changed, the information from 2010 will be used for the permanent platform.

4 GOVERNANCE IMPLEMENTATION IN THE PORTOPIA SERVICE CLOUD

One of the main objectives of Portopia is to increase substantially the efficiency and user friendliness of data collection and to build a solid data warehouse ensuring data confidentiality of individual contributors in all phases (collection, calculation of indicators, reporting). It is also the objective to automate as much as possible the calculations and management of the data and outputs of the system.

While the questionnaire could not be implemented in the platform on time for the survey, it is foreseen to implement in the platform a data collection, analysis and reporting module on governance. The data of the Fact Finding surveys will also be integrated in the PORTOPIA data warehouse so that the formal execution of a survey will not be needed any more. Ports will have a profile containing governance data and will only need to update their individual information in the platform when relevant changes occur in their situation.

It is proposed that the governance module of PORTOPIA consists of:

- A port authority individual and confidential governance profile. A proposal of the content will be detailed in D5.2. The profile would be populated with the data already compiled through the Fact Finding surveys 2010 and 2015, when available. Ports would be invited to validate/update the governance profile. Ports that have never participated in the past surveys would be invited to complete the profile directly in the PORTOPIA platform. The individual data of each port profile would remain accessible and visible only to the relevant port authority.
- A yearly EU port sector governance dashboard that will illustrate basic features of the governance of EU ports and of the main trends over time. This would be built by aggregating the data stored in the individual profiles (see proposal in D5.2).

In this way, the Portopia platform will generate added value for the sector in terms of monitoring and communicating governance trends over time. ESPO members will not need to complete lengthy surveys every 5 years. They will just need to update their profile ad hoc when changes take place in their governance framework.

5 DISSEMINATION ACTIVITIES AND MATERIAL

An attractive publication was elaborated to publish the report “Trends in EU ports Governance 2016”. The publication was presented and distributed at the ESPO general assembly and at the annual Conference that took place in Dublin on 1 and 2 June 2016. A presentation compiling the main results was given by the ESPO secretariat in the first day of the conference. The presentation in the conference can be found here: <http://www.espo.be/ESPO-Conference-presentations>.

The publication is available from the ESPO website in electronic format from the following link: <http://www.espo.be/publications/trends-in-eu-ports-governance-2016>.

The report was also disseminated through a specific press release and in the overall conference press release from ESPO.

<http://www.espo.be/news/espo-launches-trends-in-eu-port-governance-2016>

<http://www.espo.be/news/the-espo-conference-2016-in-10-quotes>

The publication has been translated in Italian by Assoport (the Italian ports association) and published in Chinese in a transport specific publication (please see Annex 3 and 4).

The publication was sent in June 2016 by post to 100 contact persons within DG Move in the European Commission and to all Members of the European Parliament Transport Committee.

It is also the objective that the results are presented in sectoral conferences during the rest of the year and during 2017.

The implementation of the governance dimension in the Portopia platform will also allow communicating governance trends in the EU port sector. More detailed information will be compiled in deliverable D5.2.