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Foreword by the Chairman

I am delighted to be able to present our annual report which this year is in a new style and a new format.

We hope that the changes will provide a useful insight not only into what ESPO does but also into the main developments and events in each member state.

The EU ports sector is characterised by wide variations in type, size, ownership and management philosophy. This natural diversity is both a strength and a challenge. For ESPO it means an equally diverse agenda, ranging from maritime policy through to the detail of environmental, transport and planning policy. It means that ESPO has to be active on many fronts. We have tried to describe this activity in a clear and simple way.

Much of our work is concerned with responding to legislative and policy proposals from the European Commission. Even if the Commission were to cease all operations tomorrow - an unlikely possibility - the changing dynamics of the shipping, freight and transport markets would ensure that there was plenty for ESPO to respond to on behalf of its membership.

The increasing commercialisation of ports, tougher competition, the need to achieve sustainable development, the effects of globalisation - these are just some of the influences having a major impact on every member of ESPO.

2001 has been a crucial year for the port sector. The publication of the 'Ports Package', and especially the proposed Access to Port Services Directive, have provided a new and often controversial focal point. In response ESPO has taken the opportunity to consult widely and set up a number of successful regional meetings as well as a major public seminar to develop a common approach. This work will feature just as strongly in 2002 and for the foreseeable future.

Although there was a concentration on the Directive and the Ports Package, there has been a great deal of other vital work, particularly that carried out by the four ESPO Committees dealing with marine issues, the environment, transport and statistics. The launch of our Environmental Review and the setting up of the MARPOL workshop have shown how ESPO can set challenging targets and provide a unique forum to share information and expertise.

We also took the opportunity to streamline ESPO’s internal organisation with the setting up of a new Executive Committee. The commitment and support of the members of that committee and of the General Assembly have been crucial to the smooth running and effectiveness of ESPO during the year.

None of this would have been possible without the enthusiasm and professionalism of the ESPO Secretariat. Over the past 15 months, a totally new team has come in and the change over has been effected with great efficiency and skill.

We therefore look forward to the many challenges ahead.

David Whitehead

Chairman of ESPO
Challenges and Solutions
Antwerp, 11th October 2000

ESPO - European Sea Port Policy
1. Port and transport policy

European seaport policy takes shape but remains controversial

The European Commission published, on 13th February 2001, the long-awaited follow-up of its 1998 Green Paper on Sea Ports and Maritime Infrastructure. The so-called “port package” took the form of a Communication, containing a Directive proposal on port services, a factual report on public financing and charging practices as well as an interpretative, but non-binding, summary of Community rules on transparency and State aid.

The Directive proposal on port services constitutes the most important element of the “port package”. According to the Commission, its aim is to establish clear rules and set up open and transparent procedures for potential service providers wishing to operate in EU ports.

Given the diversity of its membership and the controversial nature of the Directive proposal, ESPO opted for a widespread consultation of its membership before presenting its overall recommendations to EU policy makers. A series of regional workshops were organised, with the assistance of the Commission, to study the potential impact of the measures introduced by the Directive. The conclusions of these workshops were brought together in a common position, which highlighted six basic concerns:

- there is a risk that the current proposal could discourage investments in ports;
- the proposal may disregard the vital strategic function of the port authority;
- the proposal may introduce a “one size fits all” policy for all port users;
- there is a risk that some of the proposed measures may lead to additional bureaucracy;
- the proposal may not contribute to the creation of a “level playing field”;
- there is a risk that some of the proposed measures could diminish the quality of port services.

On 11th October 2001, ESPO organised, with the kind co-operation of the Port of Antwerp, a major seminar on European seaport policy, which enjoyed the participation of Commission Vice-President Loyola De Palacio and high-level representatives from the European Parliament and Council. The event was attended by 250 participants.

The seminar emphasised the crucial role of the port authority and demonstrated that different views exist on this role, ranging from a neutral referee to a market player. The main challenge for the port sector is to deal with this diversity and, in the light of the Commission’s Directive proposal, find common denominators.

The European Parliament finalised its opinion on the Directive proposal in first reading on 14th November. The amended text includes a number of improvements, some of which are in line with the concerns expressed by ESPO about the original proposal. Nevertheless, the generally mixed result, with pilotage excluded and cargo handling included, has shown that a fuller debate about the Directive’s potential impact would have been helpful.

Parliament also introduced amendments concerning port financing and state aid, which raise some new possibilities. These amendments are above all political statements and it remains to be seen what would be the most appropriate form of legislation to implement them. ESPO nevertheless hopes that the Commission will take full account of this important signal from Parliament that competition between ports is a major issue and must not be ignored.

There is still a long way to go before the Commission’s proposal will actually become legislation. ESPO will therefore continue to work for a result which can be satisfactory for the entire ports sector.
“Time to decide” – Europe’s transport policy plans for the next decade

In autumn, the Commission published a White Paper setting out a scenario for the European Union’s transport policy in the next 10 years. The following key-questions are raised:

• how should intermodality for goods transport be implemented in practice?
• how would a fair price for transport be developed?
• what are the aims of the new trans-European transport infrastructure network?
• how can the rights to free market, to quality and to safety be reconciled?

The White Paper contains an ambitious action plan with more than sixty concrete proposals which are intended to address these key-issues. The document furthermore gives a prominent position to waterborne transport, including short sea shipping, as an environmental-friendly alternative to more polluting modes of transport.

In its initial reaction, ESPO said it supports the promotion of environmental-friendly transport modes, provided that such is seen in an intermodal context and provided that such promotion does not distort free and fair competition within a given mode.

An interventionist approach, as proposed by the Commission in some areas (new Marco Polo programme, “motorways of the sea” concept), should therefore be approached with care. Aid measures in this respect should be well-defined, limited and controlled. Projects selected and eligible for financing should furthermore be viable, innovative and have a high potential of replication.

For the ports’ sector, the Commission’s intention to propose a framework Directive on infrastructure charging in the course of next year is of particular interest. The idea of developing such a framework is not new. What is a major step forward is that the Commission now realises that, in order to realise a true “level playing field” and to avoid counterproductive effects, such a framework should apply to all modes of transport and, for instance, should not be applied in isolation to seaports, as proposed earlier.

ESPO will submit more detailed comments once the preparation of these and other measures announced in the White Paper will become more concrete.

Short sea shipping : from theory to practice

Meanwhile, the European Commission continued its policy of promoting short sea shipping. A European-wide exercise to identify concrete bottlenecks that hamper the development of sea shipping as well as potential solutions, was launched in 2000.

As a first concrete step in follow-up, the Commission published a proposal for a Directive that aims to address the existing bottleneck related to reporting formalities for ships calling at EU ports (on arrival and departure). The Commission introduced the compulsory use by all ships of a single set of documents, based on the standardised IMO PAL Forms. ESPO welcomed the fact that this will allow carrying out the formalities in a uniform and simplified way and facilitate maritime transport.

The bottlenecks are also being discussed at industry level, within the framework of the Maritime Industries Forum (MIF). ESPO plays an active part in working groups dealing with nodal points, customs and administrative procedures and cargo flow statistics. Main added value of these working groups is that they provide industry feedback to the bottlenecks raised by Member States, thus allowing a distinction between general statements and actual problems.
2. The ship-shore interface

The responsibilities of port authorities...

In the context of the post-Erika measures, which were issued by the Commission in 2000 after the sinking of the Erika tanker off the French coast, attention was also drawn to the role played by ports to ensure safety at sea.

The Commission's proposal to establish a **Community monitoring, control and information system for maritime traffic**, which is one of the elements of the so-called “Erika II” package, is of particular interest in this context. The proposal will make it more practical for port authorities to exchange traffic-related information with different parties such as Port State Control authorities and other ports in order to make better use of information, monitor traffic and reduce the risk posed by ships carrying polluting or dangerous goods. ESPO has therefore welcomed the general idea of the Commission's proposal.

The proposal also refers to the responsibilities of port authorities to accommodate ships in distress. The concept of “**ports of refuge**” has furthermore drawn the attention of IMO, following the incident with the “Castor”.

Port authorities are ready to take up their responsibilities on this matter. However, as accommodating ships in distress entails considerable risk for ports and requires a balanced approach, ESPO believes that ports should benefit from the following guarantees:

- Ports should be able to refuse access to a ship in distress if the accommodation of this vessel would endanger the safety of the port, its wider community, environment and economy;
- Ports should be granted prompt compensation for accommodating a ship in distress;
- Insurance of the ship and its cargo should be made compulsory. The relevant international conventions should be brought into force at the earliest opportunity;
- A ship in distress does not necessarily need to find refuge in a port; access to sheltered waters constitutes a sufficient guarantee.

In its opinion in first reading, the European Parliament has taken some of these points on board and amended the Commission's proposal to make the responsibilities of ports for the accommodation of ships in distress proportional to the actual risks involved. The proposal will now be debated in Council.

... and port operators

The responsibility of ports, particularly that of terminal operators, has been highlighted in another Commission proposal, dealing with **safe loading and unloading of bulk carriers**. This proposal is based on the IMO BLU Code and aims to establish effective communication and clear procedures between the ship and the terminal during handling operations. ESPO has welcomed the Common Position reached by Council in June, which introduced more flexibility with regard to the mandatory quality management system proposed by the Commission. ESPO hopes that Parliament will be able to accept this amendment during the second reading of the proposal.
On many occasions, EU policy makers have been looking at port charges and fees as a way of introducing measures to promote maritime safety and clean seas.

The best example is the Directive on port reception facilities for ship-generated waste and cargo residues, which has to be transposed into national legislation by the end of 2002. As from this date, ports will have, inter alia, to recover the costs of port reception facilities for ship-generated waste, through the collection of a fee from ships. The cost recovery system must be such that all ships contribute significantly (i.e. at least 30 %) to the cost, irrespective of the actual use of the facilities.

ESPO organised jointly with the International Association of Ports and Harbours (IAPH) a workshop in Rotterdam on 14th June 2001 to assist port authorities in preparing for the implementation of the Directive. One of the concrete aims was to see to what extent common approaches would be possible to avoid distortion of competition. For the charging aspect, this proved to be particularly difficult. As a further step, ESPO will be developing some recommendations on the implementation of the Directive both for Member States and ESPO members, taking into account the practical effects for port authorities.

With the proposed Directive on accelerated phasing out of single hull vessels, which is part of the first package of post-Erika measures, the Commission tried to introduce a system of differential charging in EU ports. ESPO objected to such an approach. Whilst differential charging may be used to encourage good practice in ports, it should be a matter for individual ports based on their own circumstances. Ports are commercial operators and their charges are designed to reflect commercial realities and to ensure that port users make a fair contribution towards the cost and the services which they enjoy.

Fortunately, an agreement was reached by EU institutions and Member States that priority should be given to an agreement at international level. Such an agreement was reached in IMO in April.

Finally, the reduction of the harmful environmental impact of emissions of SO2 and NOx from ships is a topical issue at international level and is likely to gain political importance at European level in the coming years.

Here again, ESPO would rather support an approach within IMO, which would have the effect of reducing such emissions worldwide and not only within EU waters. The possibility exists that policy makers would look at the option to introduce differential charges for ships using a certain type of fuel or fitted with adequate equipment. Ports should be able to choose, if they wish to do so, to structure their charges in a way which favours environmental-friendly types of vessels, but ESPO opposes any initiative imposing such practice on a European wide basis.
3. Ports in a wider environment

Towards a framework of corporate environmental responsibility

In 1994, ESPO published the first ever Environmental Code of Practice for seaports, which was the expression of the ports’ sector collective commitment to environmental improvement. Since then, several new pieces of environmental legislation were published at EU level and good practices have been developed in ports. It was therefore felt necessary to review the Code. ESPO officially launched its Environmental Review in the European Parliament on 26th June 2001.

The Review looks at the progress ESPO has made and the action it has taken since 1994. It further sets out a series of highly innovative recommendations for future action:

- Ports should prepare a publicly available environment policy setting out their strategies and methods of achieving them;
- Plans should be reviewed regularly to take account of legislative and other changes;
- Ports should produce a publicly available annual environmental review;
- Ports should consider what environmental monitoring is required to assess their environmental progress;
- Ports should establish a number of relevant environmental indicators with targets to measure progress;
- Ports should consult adequately within the local community on its environmental programme.

As a follow-up to the Environmental Review, ESPO is now carrying out an internal study based on the above recommendations in the following fields: environmental indicators, monitoring and reporting, and supply of environmental information. The aim of this exercise is to build up a picture of existing practice and to share expertise. A complete revision of the 1994 Code of Practice is scheduled for 2002.

The ECOPORTS project should be seen in the same pro-active context. The initiative for the project, which currently is still in its preparatory phase, was presented as a follow-up to the successful ECO-Information project, which came to an end in 1999. The ECOPORTS project aims at creating a better understanding of the environmental impact of port and terminal-related activities and at formulating concrete actions to minimise environmental impact and damage. At the same time, it endeavours to improving the environmental quality of the terminal area and of the logistic chain. Early 2001, the European Commission gave an initial positive assessment of the project. It is expected that ECOPORTS would formally start early 2002.
Environmental legislation should take due account of the economic needs of the port

Ports are concerned by environmental legislation which often does not address them directly. The application of certain EU measures to the port sector however entails specific difficulties and often takes little account of the specific economic needs of the sector.

The impact of EU legislation on the conservation of species and habitats protection is of high importance for ports, as the designation of a site as a protected area can hamper their development. The European Court of Justice's ruling in the case of the port of Bristol is a good illustration of the problems encountered by ports.

ESPO promotes the exchange of good practices on the basis of examples of conflicts between Habitats & port development and solutions to these problems. In 2002, ESPO will be organising a seminar on the relation between port development and the environment.

ESPO awaits the publication of a proposal for a Directive on environmental liability. In its response to the White Paper on this issue, ESPO supported the development of a common regime (preferably a Directive) for the sake of fair competition and of legal clarity and the application of the “polluter pays” principle.

ESPO however highlighted some aspects which raised some concern for the port sector, related to:

• the new area of liability, i.e. damage to biodiversity
• access to justice for interest groups
• elation with international conventions (notably MARPOL).

The Aarhus Convention recognises the importance of increased information, consultation and participation of the public in environmental matters. As the EU intends to ratify this Convention, the Commission issued some proposals in order to align relevant aspects of EU law with its provisions.

In the recommendations laid down in the Environmental Review, ports undertook to improve the communication with the public by notably preparing publicly available environment policies, annual environmental reviews and by consulting with the local community on their environmental programme.
Annexe 1 : Structure of ESPO

GENERAL ASSEMBLY

- sets the overall policy of the organisation
- 3 delegates per member State + 1 per observer country
- meets twice a year (October and May)
- elects its Chairman and two vice-Chairmen
- appoints Secretary General

EXECUTIVE COMMITTEE

- daily policy-making body
- 1 representative per member State + observers
- meets 5 times a year

TECHNICAL COMMITTEES

- give technical advice on specific subjects which fall within their scope of competence
- four areas : transport, marine, environment and statistics
- make recommendations to the Executive Committee which makes the final decision
- 1 representative per member State + observers

SECRETARIAT

overall coordinator, responsible for:
- communication
- representation
- administration and finance

ESPO officials:

Chairman : David Whitehead (UK)
Vice-Chairman : Giuliano Gallanti (I)
Vice-Chairman : Dirk-Kersten Behrendt (D)
Chairmen Technical Committees:
- Transport : Stavros Hatzakos (GR)
- Marine : Guido Van Meel (B)
- Environment : Herman Journée (NL)
- Statistics : Txaber Goiri (E)

Secretariat:

Secretary General : Patrick Verhoeven
Assistant Secretary General : Marie-Philippe Coloby
Secretary : Cécile Overlau
Accounting : Jeanette Voosen
Annexe 2 : Developments in ESPO member-countries

BELGIUM

Representatives in ESPO:

General Assembly: E. Bruyninckx (Antwerp), P. Kerckaert (Bruges-Zeebrugge), E. Van Craeyvelt (Ghent)

Executive Committee: P. Van Cauwenberge


For all the Belgian seaports (all located in Flanders: Antwerp, Bruges-Zeebrugge, Ghent, Ostend) 2000 was an excellent year for the maritime cargo traffic.

- Antwerp: 130.5 mln. tonnes
- Bruges-Zeebrugge: 35.5 mln. tonnes
- Ghent: 24.0 mln. tonnes
- Ostend: 4.3 mln. tonnes

New investments were realised in container facilities with the construction of a new tidal dock in Antwerp. In the Flemish Parliament there were discussions on the long-term vision of the development of the Scheldt estuary. Parliament agreed on June 1, 2001 unanimously that the river Scheldt could be deepened to 12.8 m in a first phase.

The globalisation in the container handling sector will have consequences in the Flemish ports. Two container handlers (Hessenatie and NoordNatie) merged. PSA (Port of Singapore Authority) took a majority share in this new combination.

The port of Ghent started with an investment in the 2nd phase of the Kluizendok. New development investments were announced by a car assembly plant and by a major paper plant. The director general Capt. A. De Wilde of the port of Ghent retired at the end of 2000. His successor is Capt. E. Van Craeyvelt.

The port of Bruges-Zeebrugge is now the leading port in Europe for the traffic of new cars. Container handling also reached a record figure. Zeebrugge is now more than before on the crossroads of east-west and north-south ro-ro links. A new chairman, Mr. J. Coens was appointed at the port authority’s General Assembly of March 2001 in succession of F. Chevalier Traen who has retired after more than 40 years at the helm of the port.

The port of Ostend realised an impressive increase in maritime traffic due to an important increase in ro-ro traffic.

The Flemish ports held discussions about the “port package” in the Flemish Port Commission (representatives of the port authorities, transport modes and social partners). A regional conference on the port package was hosted in Bruges on May 4th.
Cyprus

Cyprus, an island located in the northeastern corner of the Mediterranean basin, is an open market economy with a population of about 800,000 inhabitants. It relies heavily on foreign trade, which is mostly carried out through the multipurpose port of Limassol, the largest port of the country. Cypriot ports are managed and operated by the Cyprus Ports Authority, an autonomous semi-governmental body, responsible for the operation, maintenance and development of the ports under its jurisdiction. According to its legislation the Authority must produce such revenue as to ensure self-financing and development.

During the year 2000, traffic through Cypriot ports increased by 2.4%, reaching a level of 7.8 million tonnes, of which 3.6 million tonnes were handled through Limassol, while the multipurpose port of Larnaca handled 0.4 million tonnes. The island’s petroleum imports, about 2.4 million tonnes, are handled through the specialised oil terminals of Larnaca, Dhekelia and Moni. The industrial port of Vassiliko handles mostly dry bulk cargo for the needs of the local cement factory. As regards passenger traffic through the ports of Limassol and Larnaca it has increased by 19%, from 694,000 in 1999 to 825,000 during 2000.

Current emphasis is being placed on the development of Larnaca port into a major specialized passenger/cruise port. The project will be assigned to the private sector through international tenders. The government has secured the services of consultants to assist in the implementation of the project and towards the end of 2001, the Government of Cyprus, has initiated a tender process for the award of a concession contract to a suitable bidder for the re-development of Larnaca port under a long term Design-Build-Finance-Operate style contract.

With respect to environmental matters the Cyprus Ports Authority will upon accession to the EU, expected 1/1/2003, amend its regulations to cover all provisions of the Directive 2000/59/EC of the European Parliament on port reception facilities for ship generated waste and cargo residues.

DENMARK

During the year 2000 the share of total exports (measured in tonnes) from Denmark passing through Danish seaports reached an impressive 75%. Total tonnage handled was 96.5 million tonnes.

The Danish Government expects to present a “Port Development Package” this year. The key issues in the package are the following: a vision for the port; a strategy for implementation of the vision; identification of barriers to the implementation and proposals for removing such barriers; introduction of IT logistic systems; spreading “best-practice” instruments; pilot-projects; competence development, and maritime networks.

The aim of these “maritime networks” is to create a forum in which all Danish maritime transportation parties can meet and discuss how to improve the framework conditions for the Danish maritime transportation system.

By January 1, 2000 a new ports legislation was inaugurated. The primary effect of the legislation was privatisation. With privatisation state-owned ports were sold to local municipalities. A port director will now run the port under the guidance of a local port board. The purpose of privatisation is to run Danish ports on relatively more
commercial terms. The expected deduced effect is increased competition within and between ports and thus increased overall efficiency of the Danish ports system. In Denmark there is freedom of trade among suppliers of port services. All markets for port services (except for maritime pilotage, so far) are therefore expected to be subjected to increased competition.

By January 1, 2001 the Port of Copenhagen (Denmark) and the Port of Malmö (Sweden) merged and joined all their port operations into one company, Copenhagen Malmö Ports (CMP). The merger is a logical consequence of the ongoing transformation of Southern Sweden and the Copenhagen Metropolitan Area into the Øresund Region.

On April 1, 2001 the Port of Aarhus, in Eastern Jutland, inaugurated its new Container Terminal East. The facilities, which are operated by Maersk Sealand, allow for handling of Post Panamax ships.

The Danish Environmental Protection Agency presented a plan for port reception facilities in the spring of 2001. Denmark is in the process of adjusting and implementing HELCOM and EU Directives on port reception facilities. Even though different points of view exist shall be heard, all involved parties share the view that environmental protection must be prioritised coinciding with financial proportionality.

FINLAND

Representatives in ESPO:

General Assembly: M. Aura (Finnish Port Association); M. Sinisalmi (Pori); M. Meinander (Helsinki)

Executive Committee: M. Aura


The overall capacity of Finland’s ports is staying ahead of the steady growth in annual tonnage. The geographical proximity of Finnish ports to Russia, the Baltic States and the rest of Scandinavia creates compelling advantages in logistics and distribution.

Finland has around fifty public or private ports and loading places. Twenty-three of the seaports are kept open year round; twenty-seven are municipally owned. All municipal ports are also public ports. Private companies are commissioned to handle most of the traffic in the ports, creating a favourable and efficient shipping environment.

In 2000, Finnish seaborne traffic totalled 92 million tons of the total volume of goods flow. Transit traffic to and from Russia via Finnish ports totalled 3.4 million tonnes in 2000.

The amount of passengers via all Finnish ports was 16 million. Most of them - 9.3 million - travelled to and from Sweden and 6.2 million to and from Estonia.

Finland and Russia have a common land border of more than 1 200 kilometres. All Finnish ports are situated 550 kilometres or less from the border. The leading Finnish ports are located on the Gulf of Finland, as is St. Petersburg. Finns and Russians have hundreds of years of experience in doing business together.

Finnish ports offer a fine infrastructure and superstructure. Plenty of free capacity and high efficiency through specialisation keeps transit times short and delays to a minimum. The ports themselves, with their railways, highway, sea and even river links offer safe access to the border and to inside Russia and the former Soviet Republics.

Acting as a gateway requires links in other directions as well. Several daily and weekly connections to the ports around the Baltic Sea and numerous continental European ports guarantee efficient access. The new railway connections to Russian inland areas will help increase the transit traffic through the Finnish ports.
The issue of market access to port services was not considered as an urgent one by the French port community until the Commission published its Port package in February 2001. However, in accordance with ESPO's proactive attitude towards the proposal, French professional organisations concerned with the directive proposal actively consulted with each other. The satisfying result is that a common position was reached twice and made public.

Namely, AUTF (shippers), FACAM (shipping agents), TLF (freight forwarders), UNIM (cargo handling and stevedoring), UPACCIM (seaports) agreed on a common position in May in order to contribute to the debate within ESPO and with the European Parliament's Committee on Transport & Regional Policy. Common analysis and recommendations to members of the European Parliament, also associating CCAF (shipowners), were concluded by those same organisations, shortly before the plenary vote of Nov. 14th.

Seaports belong to the French state, and their administration remains mainly under tight central control. Decentralised ports which are under the control of Départements account only for 2% of total national seaports tonnage. According to a proposed legislation to be adopted by Parliament during the 2002 spring session, French Regions may also be offered to take over this responsibility from the State, for some of the current 17 metropolitan and 4 overseas ports operated by Chambers of Commerce and Industry, on a voluntary and experimental basis. For those Regions accepting the offer, the experiment would last until the end of 2006. A new law would then be drafted to redefine the role of state, regions and Départements in the port sector. This appears as a cautious move towards a hypothetic further decentralisation of French port activity.

French Transport policy in general was revised after a two year consultation process that ended in July 2001, with the approval by the French government of a series of nine long term (20 years) Schemes, each covering a major sector of public services and investments. The Scheme for transport (Schéma de services collectifs de transports de voyageurs et de marchandises) contains forecasts and coordinated measures for answering future demand on an intermodal basis. Rail is offered as a main alternative to road transportation, and is being asked to double its offered capacity within 10 years. Maritime solutions are also favoured, similar to those proposed by the European Commission in its September 2001 White Paper.

In this context the French central port and ship administration has devised from 2000 a subsidy programme for financing marketing studies and initial costs of launching new short sea shipping services, very similar to the PACT and Marco Polo programmes. First budget expenditures would be possible as soon as 2002, provided that concrete and efficient projects will be engineered and submitted by shipowners and shippers.

With the Commission’s White Paper on Transport policy, and the announced Marco Polo programme favouring sea motorways as an alternative to congested continental corridors, both French and European contexts justified the creation in April 2000 of a Short Sea Shipping Promotion Office. Most of the above-mentioned port related professional organisations are co-founders of this office, with the major addition of FNTR (French Road Transporters Federation).
GERMANY

Representatives in ESPO:

General Assembly: D. Behrendt (Port of Hamburg); I. Piorkowski (Port of Bremen); E. Jagl, alternate (Ports of Lower Saxony); J. Eggers, alternate (Ports of Schleswig-Holstein); K. Richter, alternate (Ports of Mecklenburg-Vorpommern)

Executive Committee: D. Behrendt


The last year has been a very successful one for all German ports. The overall cargo turnover has increased especially in the container sector, which has been growth-promoting.

- In the Port of Hamburg the total transshipment volume of the year 2000 reached a record level of more than 85 million tonnes. The containerized transshipment volume rose to 48.7 million tonnes or more than 4.2 million TEU. Again in the first half of this year, the Port of Hamburg continued to record a further sharp increase in transshipment volume.
- The Ports of Mecklenburg-Vorpommern reached a cargo handling volume of 26.7 million tons, 2 million tonnes more than in 1999. A new line from Rostock to Hanko (Finland) was established.
- Bremen Ports handled 2.75 million TEU, an increase of 25% compared to 1999. The total turnover grew by 24% to 44.8 million tonnes.
- The ports of Schleswig-Holstein reached a total transshipment volume of 35.5 million tonnes in 2000. All important ports (Brunsbüttel, Kiel and Lübeck) recorded an increase in cargo handling turnover, in Kiel even by 204 %.
- The overall cargo handling turnover in the sea ports of Niedersachsen rose by 6 % to over 68 million tonnes.

The Prime Minister of Niedersachsen and the Mayors of Hamburg and Bremen reached agreement about a new deep-water port in Wilhelmshaven. The port at that location, if it is indeed built one day, will serve as a supplementary port to clear container vessels that will not be able to sail for Hamburg or Bremerhaven with an economically viable capacity even after the shipping channel of the river Elbe has been deepened. It will be developed as a common project of the north German Länder.

In Bremerhaven, the construction of the additional Container Terminal Ct IIIa has begun. The project - which will cost 190 Mio. DM - will be completed in 2003. The berths for container ships will have an overall length of 3047 m, 340 m of those are new. The organisational structure of the Ports of Bremen changed: major parts of port management excluding public duties will be shifted to Bremen Ports Management + Services, a new company in public ownership, which will start in early 2002.

In Rostock the ferry terminal is being expanded and in Wismar the South Quay has been restructured.

The Port of Brunsbüttel will soon have an intermodal terminal, an addition to the new quay.

The Baltic Sea ports of Schleswig-Holstein are very important for the growing traffic in the Baltic Sea region. The Port of Lübeck has become the logistical centre on the continent for the Finnish and Swedish paper industry. Kiel established new lines to Russia and the Baltic countries. This became possible by the extension of the Ostuferhafen (East Shore Port).

In Hamburg, new berths for large container ships are being built. In Altenwerder, Europe's most modern freight-distribution center, an intermodal rail terminal, four deep-water berths for fifth and sixth-generation container ships and the corresponding operational sites are being built on a 200-hectare site in the south-west of the Port. A telematics program for the port, which is to facilitate links in data interchange within the scope of logistical chains as well as automated data interchange with other European ports, is being developed.

To reduce costs, Hamburg's Senate enacted with effect as of August 1 2001, a new pilotage structure for Hamburg's port pilots.

A further possibility to save on costs has been realized in Hamburg with the "Green Shipping" project, which has been under way since July 1, 2001.
The institutional framework of the operations and management regime of Hellenic ports has been subject to an important reform which now has reached its final stage. According to the previously existing regime, the organisation, administration and everyday operation of Hellenic ports were the responsibility of independent legal entities (Port Organisations of Piraeus and Thessaloniki and Port Funds) while their overall supervision, on tactical/strategic level was the responsibility of the Ministry of Mercantile Marine (MMM). The major changes brought about by the new Law 2932/2001 as well as by other measures adopted are summarised below.

Port Organisations of Piraeus and Thessaloniki have been through a series of reforms of their legal status during 1999 and 2000. As a result they changed into public limited companies (SA) with the state as their majority shareholder. Now they have the right to use and manage the port’s facilities by concession of the State and be responsible for developing and maintaining all port facilities in order to be modern and competitive, functioning under the rules of free enterprise. More recently, it was decided to issue shares to the public (via Athens Stock Exchange) up to 49% of its stock while the majority (51%) would remain to the State (the owner). Today, the Port Authority of Thessaloniki is already listed on the Athens Stock Exchange. The Port Authority of Piraeus will also issue shares to the public shortly.

The legal status of another ten Port Funds of major national significance (i.e. Alexandroupoli, Elefsina, Heraklion, Igoumenitsa, Kavala, Kerkyra, Laurio, Patra, Rafina Volos) is currently being changed. According to Law 2932/2001 they will be transformed into public limited companies with the State being their only shareholder. These companies will have a supervising role, at tactical/strategic level but will not interfere in daily matters.

The remaining Port Funds are in process of being transferred to the prefectural or local government which in turn will assume the management of the local or prefectural ports. In this case the State will have a supervising role, at tactical/strategic level but will not interfere in daily matters.

Furthermore, the new Law foresees the creation of a General Secretariat of Ports and Port Policy which will operate at the MMM under the supervision of the Minister of Mercantile Marine. The General Secretariat will have the responsibility for the overall planning and the enforcement of a national port policy with the aim of developing competitive ports with modern infrastructure. A Port Planning and Developing Committee will be set up consisting of 11 members from various Ministries, which will be assigned with the task of mastering and implementing the Greek Port Policy.

ICELAND

Representatives in ESPO:

General Assembly: H. Valdimarson (Reykjavik)

Traffic through Irish ports continued to increase during 2000. A total volume of 53.10 million tonnes of sea-borne traffic moved through 17 ports, 5.4% greater than in 1999. Dublin Port handled 21 million tonnes of mixed traffic including ro/ro, lo/lo and bulks. Shannon Foynes and Cork handled 10.3 and 10.2 million tonnes respectively. In recent years port traffic has been growing at 7% per annum and the investment programme in port facilities since 1990 has been more than vindicated by the effective handling of the greater volumes of cargo on offer.

During the year legislation was enacted enabling the Minister of the Marine and Natural Resources to amalgamate port companies and subsequently Shannon Estuary Ports Co. and Foyles Port Co. merged in September 2000.

Performance audits were carried out for the first time on behalf of the Government by consultants, Jonathan Packer and Associates, on a number of port companies; all aspects of operations (public and private) in each port were examined in detail with a view to establishing if the port authority and its service providers were performing in a cost effective manner and fulfilling their roles in the national and regional economies. It is intended that such audits will be repeated at three-yearly intervals.

The Department of Marine and Natural Resources commissioned a port capacity study from consultants, Baxter Eadie and Co., covering the period 2000 to 2007. A number of potential capacity shortfalls were identified, particularly in the unitised cargo trades.

Significant developments in ports included:

- the installation of vessel traffic management information systems (VTMIS) in Cork, Rosslare, Shannon Foynes and Waterford.
- the refurbishment of Berth 51 incorporating a double tier ramp and the completion of new ramp at Berth 53 in Dublin Port.
- in Drogheda the completion of new terminal at Tom Roe Point.
- major marina developments at Dun Laoghaire and Waterford.
- publication of strategy for development of the Port of Cork to cover the period 2000 to 2020.
- completion of new terminal facilities for 60,000 dwt. vessels at Shannon Foynes.
- deepening of approach channel to New Ross.
ITALY

Representatives in ESPO:

General Assembly: G. Gallanti (Genoa); F. Nerli (Assoporti); L. Robba (Assoporti)

Executive Committee: G. Gallanti


No port-related legislation was enacted in 2001 in Italy, with the exception of a new law meant to modify the rules applying to the provision of temporary port work. This text was issued in order to adapt existing national legislation to EU requirements.

The institutional and organisational port system, set by Law 84/94, established port authorities according to the following scheme: responsibility for planning and licensing is granted to the port authorities, while commercial activities are carried out by private companies.

This new system, even though it was put in place during a quite unfavourable economic situation at international level, has encouraged a further increase of traffic volumes in Italian ports. During the period 1999-2000, the loading and unloading throughput increased with about 5% in the main Italian ports. Container and passenger traffic increased respectively with about 16% and 7%.

Moreover, a voluntary agreement was concluded, in the field of environmental protection, between Assoporti (representing port authorities), the Ministries of Transport and Environment, the Italian Manufacturers’ Association, Trade Unions and Environmental Associations. This agreement aims to achieve higher safety standards for maritime transport of hazardous goods. The agreement provides for an accelerated phasing-out of single hull tankers and oil tankers and further measures to prevent the risks related to the maritime transport of hazardous goods.

Finally, the recent set-up of the Italian Short Sea Shipping Promotion Bureau should be highlighted. It follows the creation of equivalent offices in most EU maritime Member States.

LATVIA

Representatives in ESPO:

General Assembly: I. Gorbatikova & L. Loginovs (Riga)

Technical Committees: Environment: S. Lizuma
Unlike many other countries, the Lithuanian maritime industry is concentrated in one place i.e. in the port of Klaipeda.

Klaipeda Port is a multipurpose port and now is capable of handling more than 25 — 30 million tonnes of cargo per year. In 2000, 19.4 million tonnes of cargo were handled in the port. Main cargoes are oil products, fertilisers, metals, frozen products, timber, containers. Over 7000 vessels enter the port annually. Port infrastructure belongs to the state and is managed by Klaipeda State Seaport Authority. Commercial activities in Klaipeda port are carried out by private enterprises. At present, there are eight specialised stevedoring companies, three ship repair yards, one shipbuilding yard, fishing companies and various freight forwarding and shipping agencies. The quality of services rendered by the port companies complies with the world requirements, as ISO certificates granted to shipping and stevedoring companies, as well as, to freight forwarding and shipping agencies confirm the fact.

In addition to Klaipeda port, Būtingė terminal should also be mentioned. In 2000, not far from the border with Latvia, Būtingė terminal was launched to operation. The terminal is connected by pipeline with Mažeikiai Oil Refinery. Its annual capacity totals 8 million tonnes. In 2000, 3.5 million tonnes of crude oil were handled in the terminal.

Maritime transport activity of the Republic of Lithuania is carried out in direct compliance with the International Conventions, including SOLAS, MARPOL, STCW, etc., as well as with the national legislation, the most important of which are: the Lithuanian Law on Merchant Shipping, Klaipėda Port Act and Lithuanian Law on Navigation Safety.

In 2001, Safety Shipping Administration has been established. Its main function is to ensure the implementation of the national and international legal requirements on navigation safety and ships’ pollution prevention in Lithuanian vessels, seaports and maritime companies. The maritime qualification proving certificates that are issued in the Republic of Lithuania are included in the IMO “White List”. The fact, obviously, shows that the high level of equipping of specialists is acclaimed worldwide.

**MALTA**

The Ports Directorate of the Malta Maritime Authority is the port authority for all ports in Malta; it regulates and manages the ports. However, the Malta Freeport Corporation is responsible for the regulation and licensing of companies operating commercial activities within the freeports.

The main function of the Ports Directorate is that of ensuring the provision of services which guarantee the efficient and cost effective operation of Maltese ports. Its commercial orientation ensures that it creates a climate which further enhances Malta’s maritime standing and associated business activities by providing excellent services that are both effective and competitive. In fact it was instrumental in taking several initiatives to broaden the private participation in the port activities.

During the year 2000 there has not been any radical changes in the amount of cargoes handled through ports in Malta. However, there has been significant increases in other areas of the maritime package, particularly in respect of bunkering and servicing of ships.

In addition, the Malta Maritime Authority has taken the initiative to commission a study on the strategic development of the ports in Malta. Following the completion of the study in December 1999 the Directorate started a chain of consultations with representatives of the ports industry with the aim of establishing the synergy needed for the effective implementation of future port reforms.

The Ports Directorate also maintains to play an important role as a regulatory body in respect of the preservation of good order in the territorial and internal waters of Malta and the prevention and control of pollution. In this respect the office of the Harbour Master has been enhanced by the employment of additional qualified personnel and the updating of environment related legislation. It has been instrumental in safeguarding the safety of navigation and of the ports through regular inspections in order to ensure that the correct procedures in connection with the handling of dangerous goods is being applied.
THE NETHERLANDS

Representatives in ESPO:

General Assembly: W. Scholten (Rotterdam); H. Gerson (Amsterdam); H. Stevens (Zeeland)

Executive Committee: V. Schoenmakers


Maritime entrances

A decision concerning the construction of a second large sealock at Ymuiden is expected before May 2002. The channel in the Western Scheldt estuary is being deepened to allow vessels drawing 48 feet to reach the port of Antwerp in one tide. Further deepening is considered. The Dutch ports of Flushing and Terneuzen are also situated along the Western Scheldt.

Port infrastructure

The extension of the Industriehaven of Harlingen will be completed in 2003. The port infrastructure of Amsterdam was recently extended by another dock: the Afrikahaven. The port of Rotterdam is to be extended by a 500 ha second Maasvlakte. Further extension by another 500 ha will be decided upon at a later stage. The 110 ha Mosselbankensite along the Braakmanhaven near Terneuzen is to be developed to accommodate chemical industry.

Hinterland infrastructure

The Betuwe railway Rotterdam-Germany is under construction and will be ready for use in 2005. A decision concerning the reopening of the “IJzeren Rijn” (Iron Rhine) railway Antwerp-Germany, that crosses the Dutch provinces of Noord-Brabant and Limburg, is expected in 2002.

Stevedoring

Oiltanking is going to develop a tank storage facility at the Mosselbankensite near Terneuzen. The first phase will be operational in the first quarter of 2003. The second phase will be completed a few months later (total capacity: 220 000 m³). The iron ore unloading facility of Ertsoverslag Europort (EECV) at Rotterdam will be extended by a coal terminal (site: 35 ha; capacity: 55 mln tonnes/year). The terminal will come into operation in 2003. Ceres Amsterdam Marine Terminals (CAMT) expects to welcome the first customers of its new container terminal in the port of Amsterdam (capacity: 1 mln TEU/year) by the end of 2001. The European Commission has agreed with the purchase of all the shares of the Rotterdam based container stevedore Europe Combined Terminals (ECT) by Hutchinson Port Holdings, the Rotterdam Municipal Port Authority and ABN Amro Participaties. The first phase of the Maersk Delta Terminal, a 66.7/33.3 joint venture of Maersk Sealand and ECT, was commissioned mid 2000 (site: 35 ha, capacity: 11 mln TEU/year). EuroMax, a 50/50 joint venture of ECT and P&O Nedlloyd, is going to develop a new container terminal at the Maasvlakte in Rotterdam (site: 135 ha, capacity: 24 mln TEU/year). The EuroMax terminal will be commissioned in 2004. A decision about the development of the Westerschelde Container Terminal at Flushing is expected in the second half of 2001. In September 2000 the new Passenger Terminal Amsterdam was officially opened. Wijnne & Barends develops a new multi purpose terminal in the port of Delfzijl (site: 24 ha). The terminal will be commissioned end 2001.

Port management

The conversion of the Rotterdam Municipal Port Authority into a limited company of which all shares are held by the municipality is being considered.
NORWAY

Norway has a long coast line of 2700 km and about 300 communities border to coastal waters. About 80 communities have port authorities and port administrations gathered in 53 member ports of the Norwegian Port Federation. That means that in several regions, public ports join together under a common inter-municipal port administration.

The administration of Norwegian ports and coastal waters is governed by the Port and Seaways Act from 1984. The port structure in Norway is based on municipal port districts, within which you can find both public and private port sections and quays. Even in the public ports areas, which are landlord-owned by the respective municipalities, the cargo handling operations are carried out by private operators and stevedore companies.

Each municipality is in charge of their port district ruled by the Port Act from 1984. Communities having major port-activities, normally have their port affairs handled by local port authorities and port administrations.

Several changes in the public administration recently have been implemented in Norway. By the end of 2003, a municipal port authority should be organised either as an autonomous municipal enterprise or as an inter-municipal legal liable enterprise.

The Norwegian Port sector welcomes this opportunity for the public port sector to operate on a more business-like approach than previously.

These new changes also have made it necessary to revise the present Port and Seaways Act from 1984. At the time being, a Government appointed Revision Committee is working on an updated Port and Seaways Act. The Norwegian Ports Federation has a member on the Committee who is instructed to present views in line with ESPO's policy on pending European port matters. The recommendations for a new and revised Port and Seaways Act are supposed to be delivered by the Committee within 2 January 2002.

The Norwegian Parliament (Stortinget) recently discussed the proposal for a National Transport Plan (NTP) for the period 2002-2011. The idea behind the NTP being to integrate all modes of transport in one common national plan in order to enforce intermodality in the transport sector. The port industry was not quite satisfied with the weak attention ports and sea transport got in the NTP 2002-2011. However, as work already has started on NTP 2006-2015, the Norwegian Ports Federation now has been invited to take active part in the work, as member of the Main Reference Committee and with members on several sub-committees. Also in the work related to NTP 2006-2015, the port sector in Norway will link its views to ESPO-policy on important and major port matters in Europe.

Thus, the Norwegian Port Sector feels confident that the importance of sea transport, handling more than 95% of Norway's foreign trade, and 45% of the domestic transportwork, in the NTP 2006-2015 will receive more evident attention than what was the case in the NTP 2002-2011.

The total throughput of cargo volumes in Norwegian ports in 2000 amounted to about 171.5 mill. tonnes. General cargo increased with 8.9% from 1999 to 2000.

POLAND

Representatives in ESPO:

General Assembly: D. Grzegorkiewicz & K. Urbas (Gdansk)

Executive Committee: D. Grzegorkiewicz

Technical Committees: Transport: D. Grzegorkiewicz; Environment: B. Oldakowski
The Parliamentary Act on Sea Ports and Harbours of December 20 1996 brought about a marked change in the Polish port system. It stipulated, inter alia, that the Polish seaports of strategic importance to the national economy (i.e., Gdansk, Gdynia, Szczecin and Swinoujscie — handling ca. 93% of all maritime traffic) would be managed by landlord port authorities defined as public utility joint stock companies owned by the State Treasury (majority shareholder) and respective municipalities.

In the meantime, separate port operating companies were established, charged with the provision of cargo handling, pilotage, towing, mooring and other ancillary services. In certain cases, these companies are already fully privatised or private from the outset; in other cases, the amended Act on Sea Ports and Harbours provides that port authorities have to sell all their remaining shareholdings in the operating sector by yearend 2003.

Recent years saw an array of port developments in Poland, including an LPG terminal, an addition of a fourth berth to the oil terminal and a multi-handling and processing facility in Gdansk; a new fertiliser and ro/ro terminal, an upgrade of the grain terminal and a new liquid products terminal in Gdynia; as well as the biggest ferry terminal in Poland, extension of the Duty Free Zone and various specialist liquid bulk cargo terminals in Szczecin and Swinoujscie.

In the hinterland, Gdynia launched a container block train service from its Baltic Container Terminal, Gdansk initiated a container block train service along the Gdynia/Gdansk – Odessa/Illjiczivsk Corridor, and Szczecin continued to take advantage of its inland navigation links along the Odra river.

Hinterland infrastructure links were also upgraded. The Port of Gdansk now has a new four-lane road suspension bridge across the Martwa Wisła river. Meanwhile, Gdynia’s Baltic Container Terminal was connected to the road network with an elevated four-lane highway. In Szczecin, two new bridges over the Odra river, currently under construction, will improve significantly access to the port.

Poland also saw an introduction of competition in the cargo-handling sector with Gdansk and Szczecin establishing container terminals at their ports and having reported impressive volume growths ever since. Intra-port competition is also stimulated, which is evidenced, for example, by Gdansk Port Authority signing a contract on construction and operation of a new liquid chemical product terminal within its port. Further developments are planned or underway, notably, with regard to containerised and ro/ro cargoes.

Given the increasingly competitive environment, the lack of public subsidies and many years of negligence of transportation infrastructure in Poland, Polish port authorities will still face many challenges in the years to come. Of particular importance is development of efficient North-South transportation infrastructure in Poland within the TEN-T corridors and beyond.

PORTUGAL

Representatives in ESPO:

General Assembly: E. Martins (Lisboa); L. Arroz (Sines); J. Lima Torres (Leixões)

Executive Committee: E. Martins

Technical Committees: Transport: S. Gomes; Marine: C. Marques; Environment: J. Brazuna Fontes; Statistics: M.H. Spranger

Portuguese ports are an essential element to the economic and social development of the country, guaranteeing the movement of about 73.4% of all imported goods and approximately 46.1% of all exported goods. The Autonomous Regions of the Azores and Madeira receive their supplies from these ports and a fair amount of merchandise is transported to some areas of Spain. The national port system includes 9 commercial ports in Portuguese mainland territory and at least one port on each of the islands of the Azores (9 islands) and Madeira (2 islands).

Total movement for Portuguese ports for the year 2000 was 61.7 million tonnes, which represents a slight decrease of about 3% when compared to 1999. This was the result of a drop in internal liquid fuel traffic, which is increasingly being moved by pipeline. The movement of goods other than fuels increased by around 24% during the year 2000.

As the Portuguese ports are publicly owned and managed, 6 limited liability companies were founded recently to manage the 5 main national ports (Leixões, Aveiro, Lisbon, Setúbal and Sines) and those of Madeira. The remainder is managed by Public Institutes with patrimonial and financial autonomy. The changes made to port authorities were intended to provide more transparency to the financial and economic life of the ports, increased autonomy in management and greater flexibility in their relations with private economic agents.

In the meantime, large investments were made to improve the operational conditions of these ports, to increase the competitive capacity of their terminals and to resolve certain road and rail access problems that were still apparent. During this period important structural alterations were introduced concerning organisational procedures, treatment systems and support information essential to port management and the professional skills of port personnel. The aim of these alterations was to be able to provide more efficient responses to the new emerging challenges in the field of commerce and navigation.
The year 2000 saw the conclusion of the processes related to the concession of the main operating terminals of the ports of Leixões and Lisbon, thus completing a policy of private exploitation of port activity and which will also be applied to other ports. The privatisation process of port activity was accompanied by the adoption of incentive measures towards the reduction of port authority personnel, with the ports assuming the ensuing financial costs.

The most important port expansion projects have been channelled towards the port of Sines, the main national port in terms of the movement of goods. These projects include the construction of a Liquefied Natural Gas Terminal, a container terminal within the bounds of a concession contract with PSA Sines — Container Terminal, SA participated by PSA Corporation Limited and a large logistics activity zone.

**Spain**

**Representatives in ESPO:**

General Assembly: M. Moron (Algeciras); A. Angel Viudes (Cartagena); C. Ibarz (Puertos del Estado)

Executive Committee: C. Ibarz


The state-owned Port System in Spain consists of 50 General Interest Ports, managed by 27 Port Authorities, with the Public Entity “Puertos del Estado” responsible for coordination and efficiency control. Traffic volume has grown in the last years at rates higher than the GDP, particularly in respect of containerised general cargo, reflecting a more competitive position for Spanish ports in the progressively deregulated market of transport services and their greater integration into the domestic and trans-European combined transport networks.

Goods traffic in the Spanish ports has reached over 338 million tonnes, representing a 5.9% increase over the previous year. It should be noted that the number of containers moved (in TEU) and the tonnage transported in them rose by 9.25% and 7.53% respectively. In this context, the Port Authority of Bahía de Algeciras (which is second in the Mediterranean port traffic ranking) handled more than 2 million TEUs. The Port Authorities of Barcelona and Valencia have consolidated their positions as large container ports with an increase of 12.4% and 11.8% respectively over the previous year.

The Spanish port system is legally subject to the principle of self-financing. Private participation is highly increasing, not only in providing services but also in relation to investments in port infrastructure and equipment.

The legislation provides the Spanish Port System with the necessary instruments to improve its competitive position in an open, global market, setting up extended self-management faculties for the Port Authorities, which must be run on commercial business criteria. Within this framework, the General Interest Ports are intended to respond to the “landlord” model, whereby the Port Authority does no more than provide the port land and infrastructure and regulate the use of this public property, whereas the port services are essentially provided by private sector operators under an authorisation or concession regime.

Several changes are foreseen for next year in the Spanish Port Legislation concerning economic and financial aspects, as well as the regime for the provision of port services, in order to adapt the legal framework to the new port circumstances.
To marry, to live together or to remain single: there are 3 clear-cut matrimonial options facing Sweden's ports in the 21st century

The received wisdom is that, while Sweden may not have too many ports, it certainly has too many port authorities. Resolving this issue has been taxing the minds of port directors and, to a lesser extent, the owners of these port authorities for some years. It has to be said that Swedish ports have travelled some way down this road already. During the 1980s and 1990s many Swedish ports ended the old divisions between the port authority (owned by the municipality) and an often privately owned stevedore by fusing the two disciplines into one limited liability company.

This left most, but by no means all, Swedish ports and their cargo handling operations as either owned or partly owned by the local municipality. The revenue stream generated by port operations often makes up a critical portion of a municipality's annual income and perhaps the only one that is not a levy on local taxpayers. Not unnaturally, many are reluctant to lose this source of steady income or their control over it. At the same time, however, they are concerned about safeguarding jobs. So today's reality is that while harbour executives, working every day at the industry's sharp end, can clearly see the need to reduce costs further and to streamline staffing levels, many politically driven municipalities continue to work to an entirely different agenda.

As a result municipalities are seen as the reluctant bride when the question of a merger is raised between neighbouring ports. Management sees the benefits, while the municipalities do not. For this reason it is the easy option of living and working together that has been the most favoured and there are different solutions in different Swedish regions. Clearly, loose co-operation agreements set aside the question of ownership and allow greater flexibility than a full-blown merger. But they fail to address issues such as cost reduction and productivity.

Marrying, an altogether more complex and noble arrangement, has been tried with varying degrees of success, the Vänerhamn grouping of seven ports on Lake Vänern being perhaps the best example. The creation of CMP, Copenhagen Malmö Port in 2001, a company mutually owned by and operating the two ports on each side of the straight of Öresund, is a quite new concept, which remains to be evaluated.

The exception to all this is the Port of Stockholm, which through its take-over of neighbouring Nynäshamn and Kapellskär could be said to fall into the altogether more delicate relationship of having more than one mistress. Whatever the way forward, one thing is certain: the future will be different from the past.
During the year 2000 total tonnage handled in UK ports continued to increase. Total tonnage handled was 577 million tonnes, an increase of 2% over 1999. In recent years the port of London has handled the greatest tonnage, but in 2000 it slipped to third place on account of the closure of the oil terminal at Shellhaven. Grimsby & Immingham (an ABP port) was top of the table with 52 million tonnes, followed closely by Tees & Hartlepool with 51 million tonnes. In more recent months the downturn in the world economy has been reflected in some decline in tonnages, particularly container movements.

In November 2000 the UK Government published a policy paper “Modern Ports” which set out the Government’s future policy towards the industry. The UK Government is committed to developing an integrated transport system, and the paper describes the role of the ports as part of this policy. In the paper the Government commits itself to promoting a successful, safe and sustainable port industry: it will support the role of UK ports in maintaining UK and regional competitiveness; it will develop nationally agreed safety standards in docks and harbour waters; and it will promote the best environmental practice for port development and port operations. The paper does not propose any fundamental changes in the structure of the industry, or in its relationship with Government.

During the year much interest focused on the process of selecting Special Areas of Conservation (SACs) for transmission to the European Commission under the provisions of the Habitats Directive. A number of the proposed SACs are in estuaries which contain ports and concern has been expressed about how the interests of nature conservation can be reconciled with the need to promote the economic and social benefits which a successful port can offer. The port of Bristol challenged the UK Government in the European Court of Justice over its proposal to put forward the Severn Estuary as a candidate for SAC status, on the grounds that the Government had failed to take into account the economic consequences which designation would entail. The Court upheld the view of the UK Government that it was not their responsibility, under the Directive, to take economic and social factors into account in the process of designation, but the Court indicated that such factors did need to be taken into account in subsequent stages in the process. The UK industry will monitor developments closely.

The issue of greatest importance for UK ports during the past year has been the publication of the Commission’s Ports Package in February. There is disappointment in the UK that the Package did little to address the issue of state aids in the ports sector, and concern that the draft Directive on access to port services appears to have been designed with the landlord model of port in mind, whereas many UK ports offer an integrated service. There is particular concern that the proposals could discourage investment in UK ports, which all has to be financed from private sources. The UK Government issued a consultation document inviting views on the Ports Package which drew 56 responses, the majority of which were critical of the Commission’s proposals. The UK ports will watch the progress of the Directive through the Brussels institutions with the closest interest.
Annexe 3 : statistical tables

Total cargo throughput of European ports (per country)

- Including French overseas territories
- These figures do not represent the Italian ports system as a whole but only 26 main ports.
- Tare weight not included. The decrease in 1999 is mainly due to the change of report system which excluded all hinterland traffic.
- Tare weight not included.

Dry bulk in European ports (per country)

- Including French overseas territories
- These figures do not represent the Italian ports system as a whole but only 26 main ports.
- Tare weight not included.
Liquid bulk in European ports (per country)

* Including French overseas territories
** These figures do not represent the Italian ports system as a whole but only 26 main ports
*** Tare weight not included.

Total bulk in European ports (per country)

* Including French overseas territories
** These figures do not represent the Italian ports system as a whole but only 26 main ports
*** Tare weight not included.
Container cargo in European ports (per country)

* Including French overseas territories
** These figures do not represent the Italian ports system as a whole but only 26 main ports.
*** Tare weight not included.

Other general cargo in European ports (per country)

* Including French overseas territories
** These figures do not represent the Italian ports system as a whole but only 26 main ports.
*** Tare weight not included.
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