

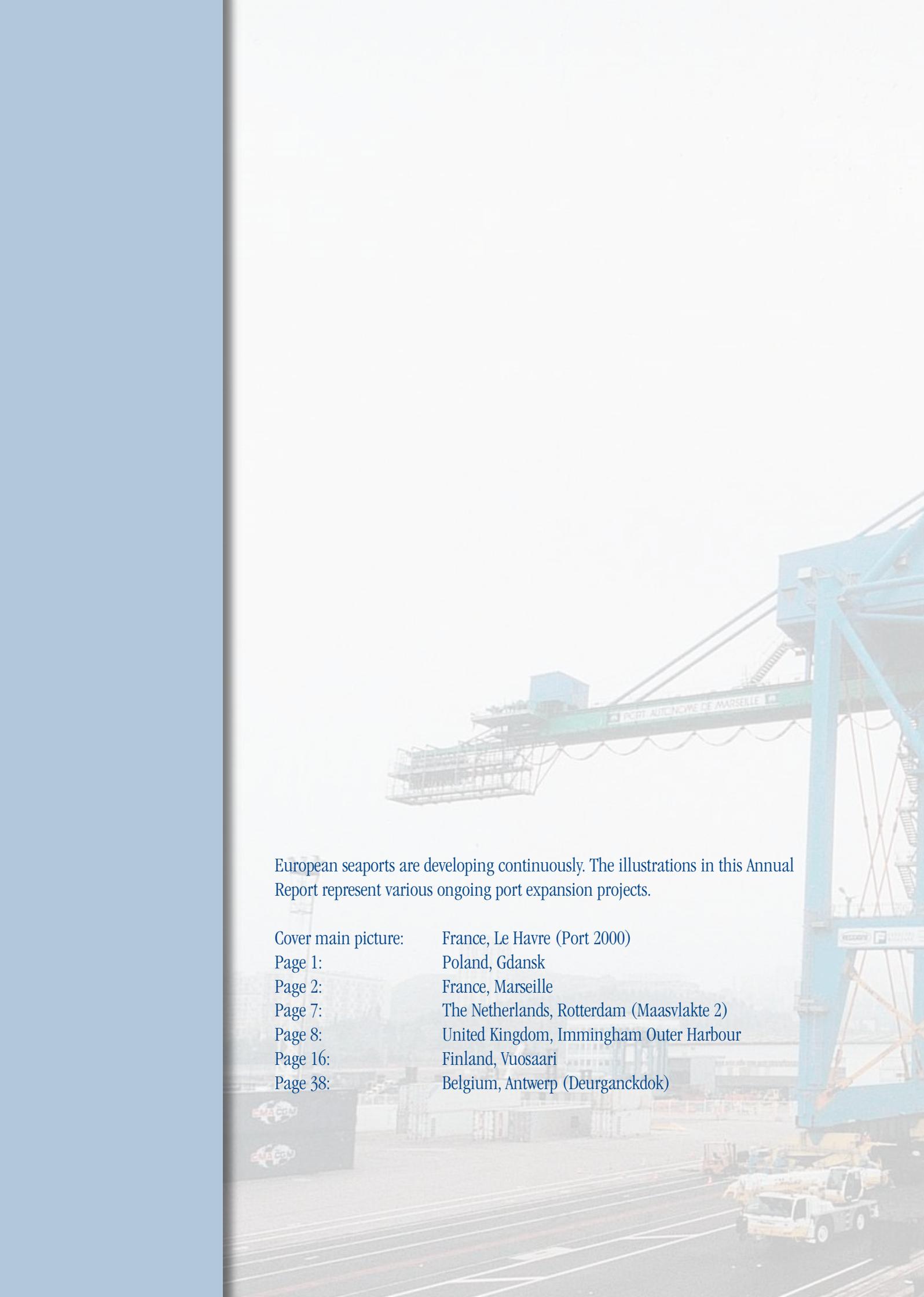


ESPO

ANNUAL REPORT 2005



European Sea Ports Organisation
VZW / ASBL



European seaports are developing continuously. The illustrations in this Annual Report represent various ongoing port expansion projects.

Cover main picture:	France, Le Havre (Port 2000)
Page 1:	Poland, Gdansk
Page 2:	France, Marseille
Page 7:	The Netherlands, Rotterdam (Maasvlakte 2)
Page 8:	United Kingdom, Immingham Outer Harbour
Page 16:	Finland, Vuosaari
Page 38:	Belgium, Antwerp (Deurganckdok)

ESPO

ANNUAL REPORT 2005

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Published in February 2006

Information concluded mid-January 2006



Foreword by the Chairman



When the first proposal of the European Commission to regulate market access to port services failed the final vote in Parliament, my predecessor David Whitehead referred to a "political drama" in the foreword of the ESPO Annual Report 2003 but he also indicated it was "a new opportunity for the future".

Two years later we are confronted with more or less the same situation. But there are a few significant differences. The first difference is that the political drama was far from unexpected this time, during the last months it became a kind of "chronicle of a death foretold", to paraphrase Gabriel Garcia Marquez. The second difference is that the opportunity for the future has now much more chance of succeeding as Transport Commissioner Jacques Barrot has indicated he is willing to make progress with the development of a coherent and supportive policy framework for European seaports.

Meanwhile, ESPO will further elaborate the ideas we already developed in our 2004 policy paper. A central question for us is the role of the port authority and the added value it can generate in the ever-globalising world of shipping and logistics.

Apart from the turbulent developments on the port services' Directive, 2005 was also a significant year in terms of European transport and maritime policy. The European Commission launched two ambitious initiatives which may have important implications for the port sector. There is first of all the revision of the Commission's White Paper on Transport Policy and, in addition, the development of a Green Paper on Maritime Policy. Both will materialise by mid-2006 and we hope that they will address the crucial theme of generating more capacity in seaports and the hinterland. A better harmonisation and more efficient implementation of environmental rules is of vital importance here.

In the field of safety and security, 2005 saw the publication of the port security Directive which now has to be transposed into national legislation. A specific concern with the Directive is the question of how to maintain an accessible port under the new security rules. This is also relevant from the perspective of port-city relations. The separation of ports and cities which has characterised port expansion over the past decades has its limits and has demonstrated that a policy whereby the port moves out of sight of the local community finds it very difficult in generating public support for its further development.

We are gearing up for another exciting year in ESPO. As ever, I am most grateful for the continued support from our members in the more than 1200 seaports we represent in ESPO, from my colleagues in the Executive Committee and from our secretariat in Brussels.

Giuliano Gallanti

Chairman of ESPO



ESPO Annual Conference - Malta 28-29 April 2005



ESPO Annual Luncheon - 22 November 2005

1. PORT AND TRANSPORT POLICY

Seaports must remain on EU agenda despite second failure port services' Directive

On 13 October 2004 the European Commission adopted a new Directive proposal on 'Market Access to Port Services'.

ESPO did not dispute the basic principles underlying the new proposal. However, to get a proper understanding of the practical implications ESPO made an **impact assessment** of the new Directive, based on a sample of European ports. The results of this exercise demonstrated clearly that the proposal would have virtually no positive impact on the European seaport sector but might, on the contrary, lead to a negative investment climate in ports, more bureaucracy, legal uncertainty and even create additional hindrances to market access. The proposal would have a far-reaching impact on the management and operation of European seaports. Moreover, the European Commission had not demonstrated or justified why such interventionist and potentially negative measures were necessary for a sector which is well-performing and internationally competitive.

ESPO therefore quickly came to the conclusion that the Directive proposal should substantially be reworked. At the ESPO General Assembly meeting of 28 April 2005, ESPO reached a **common position** on the way forward. ESPO remained convinced that a common legal framework on market access to port services could be useful in so far as it would clarify the application of EU Treaty rules, provide additional transparency and legal certainty to the managing body of the port, potential and existing service providers and their staff as well as port users. ESPO proposed essential building blocks on which a common framework should be based and translated these later on in concrete **amendment proposals** to the Directive proposal.



On 20 May 2005, ESPO co-operated with the European Institute of Maritime and Transport Law of the Antwerp University, in organising the **international seminar "The second EU Ports Package - The good or the last try?"**. The legal and economic academic world was unanimous in its criticism on the Directive proposal which would not lead to the aims and objectives put

forward by the Commission. This only confirmed ESPO's earlier analysis that the text would not bring legal certainty nor that it was fit to face current and future market developments.

Following a **public hearing** in the European Parliament on 14 June 2005, ESPO was successful in getting most of its amendment proposals introduced by Parliament, thanks to a fruitful co-operation with Rapporteur Georg Jarzembowski and other members of the Parliament Transport Committee. The vote in the Transport Committee on 22 November 2005 however led to a totally unexpected and very confusing result. Although the amended proposal was rejected, the legislative resolution on the Directive was carried which meant that the unamended Commission proposal had to go to the Plenary meeting of the European Parliament in January 2006. The result demonstrated that there was no steady political basis for the Directive and that the risk was very high that something incoherent and counterproductive would come out in the end. This is why ESPO in the final stage of the first reading in Parliament advised to have the Directive withdrawn.



The **European Parliament rejected** the Directive proposal with a majority of 532 out of 677 on 18 January 2006. There were 120 votes against rejection and 25 abstentions. Following the result of the vote, Commissioner Barrot said that he would present the opinion of Parliament to the College of Commissioners and then decide on further steps. It is generally expected that the Commission will now formally withdraw the Directive.



ESPO hopes that the second failure of the Directive will be seen as an opportunity to make a fresh start and look at the development of a more coherent European policy framework for ports. Absolute priority remains the facilitation of port development. In order for ports to be ready to accommodate the ever-increasing growth in cargo traffic, clear rules must exist on financing of new infrastructure and there must be more legal certainty with regard to the application of environmental rules. A European port policy would further on have to address the issue of services in ports and the wider supply chain as well as good corporate governance of ports. ESPO decided to dedicate its 2006 Annual Conference, which will be held in Stockholm on 1 and 2 June 2006, to a public debate on the future of European seaport policy.

Initiatives on port financing and charging temporarily put on hold

The Commission's work programme for 2005 included the preparation of a Communication on infrastructure charging which would be accompanied by specific proposals for seaports and airports. The work programme also envisaged the adoption of State aid guidelines for seaports.

On the basis of **State aid Guidelines**, it would be possible to assess which kind of public aid to seaports must be regarded as State aid within the meaning of the Treaty that is liable to distort competition between Member States and is therefore prohibited. ESPO has always advocated the development of such guidelines in order to create legal certainty and contribute to a level playing field between European ports. Given developments with the second Port Services' Directive proposal, the Commission's work on the guidelines has however been postponed. ESPO suggests to make the guidelines one of the key elements of an overall EU policy for seaports.

ESPO is however very sceptical about the need to produce a **legal instrument on infrastructure charging for seaports**. Regulating port charges would reduce the competitive position of maritime infrastructure within the supply chain and limit the commercial flexibility of ports. It would furthermore mean a return to times of government tariff regulation which in the past has led to more bureaucracy, higher port call costs and less efficient use of port infrastructure. ESPO is therefore very reluctant about any interference from European policy makers with the commercial operation of ports. This would need strong justifications, such as for instance widespread abuse at Community level, of which there is not any proof today.

Revision of European transport policy objectives is necessary



In 2001 the European Commission published the **White Paper "EU Transport Policy for 2010: time to decide"**. The White Paper aims to reduce the negative effects of transport under a situation of strong economic growth, without compromising the latter. The approach of the White Paper is based on a series of measures aiming to rebalance modes of transport and to achieve a greater effectiveness in each of them. One of the principal objectives is to decouple transport growth from economic growth.

As envisaged in the White Paper, the Commission will review its transport policy in 2006. The **revision** will serve to check whether the objectives of the White Paper can be achieved or whether adjustments are necessary. The consultation on the review started in the second half of 2005.

In its contribution to this exercise, ESPO emphasised its support to the overall aim of reducing transport-related congestion and pollution whilst ensuring a good service level for all transport users. Seaports play a significant role in achieving this aim through continuous investments in adequate infrastructure, facilities and services as well as through enhancing their environmental performance and facilitating modal shift.

Nevertheless, ESPO thinks the Commission should adjust some of its current transport policy objectives and focus on stimulating the further development of a genuine intermodal transport system. In particular, the Commission should take the opportunity of the mid-term review to reconsider the principle of decoupling transport and economic growth. Also, it should seek a better balance between transport and environmental policies in order to facilitate development of transport infrastructures and facilities which are necessary to avoid congestion. In addition, ESPO believes the Commission should redirect its current policy of penalising road transport towards a policy which recognises the advantages of each transport mode and stimulates sustainable performance of all modes. Finally, the Commission should refrain from

theoretical solutions such as the development of a common infrastructure charging framework. The position of ESPO was broadly endorsed by the Transport Group of the Maritime Industries Forum (MIF) early January 2006.

The 2001 White Paper introduced the concept of Motorways of the Sea, as a competitive alternative to land motorways. **Motorways of the Sea** were recognised as TEN-T priority projects and were covered by the TEN-T call launched in May 2005. So far selected projects relate only to in-depth preparatory studies. For ESPO, Motorways of the Sea should essentially be a market-driven concept and commercially unviable services should not be supported artificially. In particular, designation of Motorways of the Sea ports must be approached with care as it may lead to distortion of competition.

The EU further stimulates intermodal transport through the **Marco Polo** programmes. The Commission selected in 2005 12 projects under the second call of the first Marco Polo programme; a third call for proposals was launched at the end of 2005. In the meantime progress has also been made with the second Marco Polo programme, on which Parliament is expected to vote early 2006. However, as long as the Financial Perspective of the European Union for 2007-2013 is not decided, no final decision can be expected.





2. THE SHIP-SHORE INTERFACE

Security: shifting scope from port facilities to the whole port area and the supply chain

The first semester of 2005 marked final negotiations between the European Parliament and the Council regarding the proposed Directive on enhancing port security. The **Directive proposal foresees new security** measures for the wider port area. These measures will complement the existing security framework for the direct ship-shore interface which was put in place by the International Ship and Port Security (ISPS) Code and the EU Regulation on Ship and Port Facility Security.

The Directive on enhancing port security will support Member States in developing secure ports both towards maritime transport and towards landside population, as well as vis-à-vis the marine and land environment.

Ports were concerned about the requirements for controls prior to embarkation on board of roll-on roll-off vessels especially when it concerned regular ferry services between the mainland and islands. This issue has been left somewhat unclear in the final text of the Directive. Concerns were furthermore expressed about the extension of competence for the Commission as regards inspections.

The European Parliament adopted the proposed Directive in May 2005 in first reading. Thanks to a pro-active approach of Parliament Rapporteur Jeanine Hennis-Plasschaert an agreement could quickly be found with the Council and the text was formally published in the Official Journal of 25 November 2005.

The Directive will need to be implemented in the national legislation of Member States by June 2007. ESPO has already undertaken active steps to support ports during the implementation phase. Similar to the implementation of the ISPS Code and the EU Regulation on Ship and Port Facility Security the question of financing new port security measures emerged as a major issue. The estimation of overall security costs is very high and the great disparity of funding approaches between Member States may entail distortions of competition.

The European Parliament and the Council have also acknowledged this point and asked the Commission, through the Directive, to undertake a study on the costs of port security measures, addressing in particular the way financing is shared between public authorities, port authorities and operators.



ESPO will bring out in the course of 2006 new surveys on how the implementation process of the Directive evolves. A particular concern raised already is how to maintain an accessible port under the new security rules. This is also relevant from the perspective of port-city relations. The separation of ports and cities which has characterised port expansion over the past decades has its limits and has demonstrated that a policy whereby the port moves out of sight of the local community finds it very difficult in generating public support for its further development. One of the biggest challenges is therefore to keep a secure port which remains to some extent open to the general public.

Security should be part of a wider approach, covering the complete supply chain. ESPO is therefore welcoming the **forthcoming Commission Regulation proposal on intermodal security**, which is expected to oblige Member States to set up a voluntary, but controlled, framework addressing all actors in the supply chain. The proposal would be published early 2006.

ESPO feels that this initiative is essential to complement the already-existing security framework for ports and maritime transport. It can contribute to ensuring a level playing field between all transport modes. ESPO has therefore actively participated in various consultation exercises organized by the European Commission and highlighted some general points that should be part of the EU strategy to secure the overall supply chain. In particular, ESPO insists on facilitation of procedures (e.g. through “single window” concepts; advanced electronic information; 24 hour-prior notification for all modes and cargo, “known shipper” concept) and to encourage virtual inspections (such as documentation checks by Customs administrations) rather than physical checks.

Ultimate aim should be to increase security, transparency and efficiency of transport operations. It is fundamental that the forthcoming security framework does not lead to disruptions of trade and does not impose additional burden on operators. The EU regime should also be compatible with the international context.

ESPO further is encouraging the work of Directorate General Taxation and Customs Union (DG TAXUD) regarding the modernization of the **Community Customs Code**. The Customs Code, which dates from 1994, forms the Community legal framework based on common application provisions for the Customs Union.

During the last years several ideas have been brought forward in order to adapt the Community Customs Code to better facilitate trade as well as simplify legislation and administrative procedures. In 2005 Council and Parliament adopted **Regulation 648/2005 to improve the security of goods crossing Community borders** which needs to be incorporated in the modernized Code.

Regulation 648/2005 requires traders to provide customs authorities with information on goods prior to their import into or export from the EU via electronic summary declarations allowing customs authorities to carry out risk analysis. More recently, in November 2005, the Commission adopted two other proposals aiming at further simplifying the Code and introducing the use of single authorisations and promoting electronic customs.

ESPO will be closely monitoring these proposals as they also introduce preferential treatment for “economic authorized operators”. Such preferential treatment would take place in port areas and not only for customs’ purposes but also for security checks. The same idea is expected to be proposed by the Regulation on Supply Chain Security.

Places of refuge: a better decision-making structure but still no clear compensation rules for ports

The European Commission published its Third Maritime Safety Package, also known as the Erika III package, on 23 November 2005. The package contains seven proposals of new European legislation and amendments to existing legislation.

Concretely, the Maritime Safety Package consists of the following proposals:

- A proposal for a Directive on the conformity requirements of flag states;
- An amendment of the Directive on classification societies;
- An amendment of the Port State Control Directive;
- An amendment of the Traffic Monitoring Directive;
- A proposal for a Directive on accident investigations;
- A proposal for a Regulation on liability and compensation for damage of passengers in the event of maritime accidents;
- A proposal for a Directive on the extra-contractual liability of shipowners.

The question of accommodation of ships in distress, more than three years after the Prestige disaster, remains very much in the spotlight.



The proposals regarding the amendments to the **Vessel Traffic Monitoring Directive and the Directive on the extra contractual liability of shipowners** will have a considerable impact on the legal framework concerning Places of Refuge.

By accepting a ship in distress port authorities expose themselves to financial risks which need to be covered. Therefore a port authority providing refuge to a ship in distress should have the right to recover the costs related to the accommodation of the vessel.

The European Commission asked EMSA to prepare an extensive report on liability and compensation with regard to places of refuge. The study served as a basis for the proposed amendments to the Directive.

The report acknowledged the need for additional legislation as the current system does not fully cover the financial risks for port authorities in all circumstances.

This conclusion corresponds with ESPO's point that a clear chain of command for decision-making in a situation of a ship in distress must be established. Further, ESPO explained the need for a compensation regime for ports in case of accommodating a ship in distress.

The first demand has been incorporated into the revised Traffic Monitoring Directive. Member States need to designate a competent independent authority that has the final power to decide whether to accommodate a ship in distress or not. However, the amendments to the Directive do not mention if and how ports will be compensated for costs related to damage resulting from accommodating a ship in distress. This will leave ports in a vulnerable position: on the one hand they give up decision-making authority, but on the other hand they do not have any certainty regarding compensation for incurred damages.

ESPO will therefore be preparing adequate amendment proposals to the relevant provisions of the Erika III package.

Revision port reception facilities Directive may target fee system

The deadline for transposing **Directive 2000/59** on port reception facilities elapsed already two years ago. With the help of EMSA, the European Commission examined how the waste reception and handling plans, the cost-recovery systems and the notification procedures are actually working. Aim is to identify, from the perspective of both users and providers of facilities, problems and areas where improvements could be achieved.

The study was carried out by a consultant assigned by EMSA. The consultant visited 50 ports across Europe and finished its study at the end of 2005. The conclusions will serve as an input for EMSA's recommendations to the Commission on possible amendments to Directive 2000/59. Recommendations will most likely focus on the fee recovery systems which still differs widely across the EU. Amendments could enhance a further harmonization of fee recovery systems although many ports feel that this would not be effective at all and disturb existing mechanisms and contracts.

ESPO will maintain a constructive dialogue with the Commission on this matter before possible amendments to the Directive are being proposed.

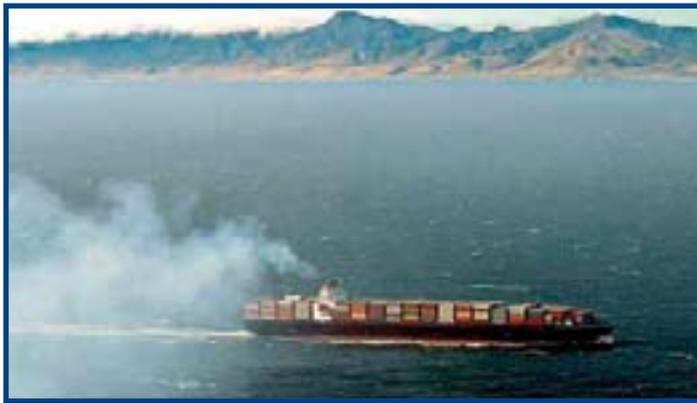
Commission continues efforts to reduce ship emissions and improve air quality

In 2005 the European Parliament and the Council adopted a **Directive on sulphur content of marine fuels**. As from 2006, the Directive should reduce ship SO₂ emissions in the EU by over 500,000 tonnes a year. To reach this reduction, the Directive envisages a 1.5% sulphur limit for fuels used by all ships in the Baltic Sea and the North Sea Channel. It further foresees a 0.1% sulphur limit on fuel by seagoing vessels at berth in EU ports, from 1 January 2010.

The adoption of the Sulphur Directive was only a first European step in the continuing strategy to reduce EU ship emissions.

In 2005, the Commission also adopted a review of the Sustainable Development Strategy 2005-2010 and a Green Paper on Energy Policy. Both documents recognize the need to fight climate change by promoting the use of clean energy and sustainable transport.

The maritime sector will be a key player in achieving these policy objectives; part of the second phase of the Climate Change Programme is a review of the EU Emissions Trading Scheme in which the maritime sector is most likely to be included. Part of the EU sustainable transport strategy is the on-going examination of the use of infrastructure charging in the EU, drawing on successful local congestion charges schemes. Given that these policy objectives are high on the EU agenda, 2006 could bring far-reaching proposals regarding further reduction of ship emissions.



The fact ports can only play a limited role in reducing air pollution seems somewhat overlooked in all this. Certain options such as use of shore-side electricity are being promoted by the Commission without having a clear vision on the cost-benefits.

In 2005, several consultancy studies came out under the Commission's 2005 ship emissions contract. These included reports on market-based instruments contributing to the reduction of mainly NO_x and SO_x emissions. It is likely that the outcome of these studies will be incorporated in future Commission proposals on this matter.

Under its Sixth Environmental Action Programme, the Commission further adopted a Thematic Strategy on Air Pollution, including a **Directive on Ambient Air Quality and Cleaner Air for Europe**.

The proposed Directive is aimed at improving air quality across Europe in order to reduce the number of deaths caused by human exposure to pollutants. The Directive requires Member States to ensure that air quality is maintained where it is good and improve it in other cases.

These provisions could have a huge impact on concentrated industrial activities such as in port areas. Moreover, the proposed Directive could make any economic development impossible as it foresees the suspension of activities, including transport or use of industrial plants as an option to achieve the goals set out in the proposed Directive.

ESPO is convinced that ports should remain free to decide which action they want to take to improve air quality in their area, depending on local circumstances. ESPO however acknowledges that ports may play a positive role in the reduction of harmful ship emissions and encourages such pro-active initiatives. Measures to reduce ship emissions, however, need to be cost-effective and economically feasible.



3. PORTS AND THE ENVIRONMENT

Maritime Policy Green Paper may address inconsistencies of EU policies

Last year, the European Commission started drafting an all-embracing discussion paper which should bring more clarity on how to provide a sustainable future for Europe's oceans and seas by allocating a specific role for all different users of the maritime environment taking into account the Lisbon objectives. EU Commissioner for Fisheries and Maritime Affairs, Dr. Joe Borg, attended the ESPO Annual Conference in Malta in April 2005 to highlight the objectives of the Maritime Policy Green Paper.



The Green Paper, which is expected to be published mid-2006, is likely to cover a broad range of topics. In its initial comments, ESPO has indicated that, above all, it sees the interdisciplinary character of the Green Paper as an opportunity to highlight existing contradictions in EU policies. ESPO expects that the Green Paper will emphasise the environmental-friendly character of maritime transport and hopes that a better balance can be achieved between environmental and transport policies to ensure adequate port and hinterland capacity and avoid congestion in Europe. More procedures must be developed which give equal weight to economic and environmental considerations.

ESPO prepares guidance document on Natura 2000

During 2005, ESPO started drafting a **guidance document on the management and development of ports within the scope of the Birds and Habitats Directives**.

Even though all ports have an environmental management system in place, they often encounter problems with the provisions of the Birds and Habitats Directives while carrying out daily management activities (e.g. maintenance dredging) or when developing new port areas.

Despite the fact that ports respect the principles of these Directives, including extensive assessments and public consultations, costly time-delays and court cases still occur.



Following a request of many members, ESPO is now drafting a guidance document that draws from good and bad examples of ports operating under the scope of the Birds and Habitats Directives. Derived from these examples a list of “do’s and don’ts for port managers” will be established. Finally the document should bring forward remaining issues which need further work by the Commission. One example is the lack of clarity regarding vital concepts such as “overriding public interest” and the different interpretations that exist at Member State level.

2005: the year of Environmental Thematic Strategies

Under the Sixth Environmental Action Programme, the Commission published a Thematic Strategy for Air Quality, a Strategy for the Sustainable Use of Natural Resources, a Strategy on the Marine Environment, a Strategy on the Urban Environment and finally a Strategy on Preventing and Recycling of Waste.

The Thematic Strategies represent the next generation of environment policy. As their name suggests, they work with themes rather than with specific pollutants or economic activities as has been the case in the past. The strategies take a longer-term perspective in setting clear environmental objectives to around 2020 and will thus provide a stable policy framework. Finally, they focus on identifying the most appropriate instruments to deliver European policy goals in the least burdensome and most cost effective way possible.

The Thematic Strategies include a number of Directive proposals of which some have an impact on European ports. As mentioned above, the Directive on Ambient Air Quality could have a far-reaching effect on the functioning of ports. The Strategy on the Marine Environment will start the discussion about the quality of Europe's seas and oceans, affecting ports and maritime transport. The Strategy on the Sustainable Use of Natural Resources and Prevention and Recycling of Waste affects the disposal of dredged material, a high priority in many European ports.

All these Directives are still within the European legislative procedure; both the European Parliament and the Council can introduce amendments to the texts proposed by the Commission. ESPO will closely monitor the relevant proposals and propose amendments if necessary.

Dredging faces difficulties under Water Framework and Waste Directives

With a lot of new developments on the way resulting from the Thematic Strategies, ports still experience difficulties in implementing some existing environmental legislation.

Dredging activities in ports do not only face problems under the Birds and Habitats Directives, but also under the **Water Framework Directive (WFD)**, which is likely to have similar restricting effects on existing activities as well as on future development projects.



The implementation of the Water Framework Directive is advancing. Most Member States have completed the transposition of the Directive into national law and have designated river basin districts and competent authorities. By the end of October 2005, 22 out of 25 Member States had submitted their Article 3 reports on the coordination of administrative arrangements within river basin districts.

Several Member States have also submitted their Article 5 reports on the characterization of river basins: pressures, impacts and economic analysis. A first clear message emerging from the analysis of pressures and impacts shows that hydromorphological changes (i.e. past physical alterations due to major water uses such as navigation) form an important implication for the well-being of the water environment across Europe.

Hydromorphological changes could also derive from dredging activities as these may have a considerable effect on the hydromorphology of the water environment affecting the natural sediment quantity and quality. ESPO will participate in a new steering group on hydromorphology existing of Commission experts, Member States representatives and stakeholder organizations. In this way, ESPO will have a close watch on future proposals which could constrain dredging activities in a further way.

Meanwhile, the Commission is in the final stage of drafting a proposal for a “Daughter Directive” of the Water Framework Directive on environmental quality standards and pollution control. This proposal could also have an impact on dredging activities in port areas.

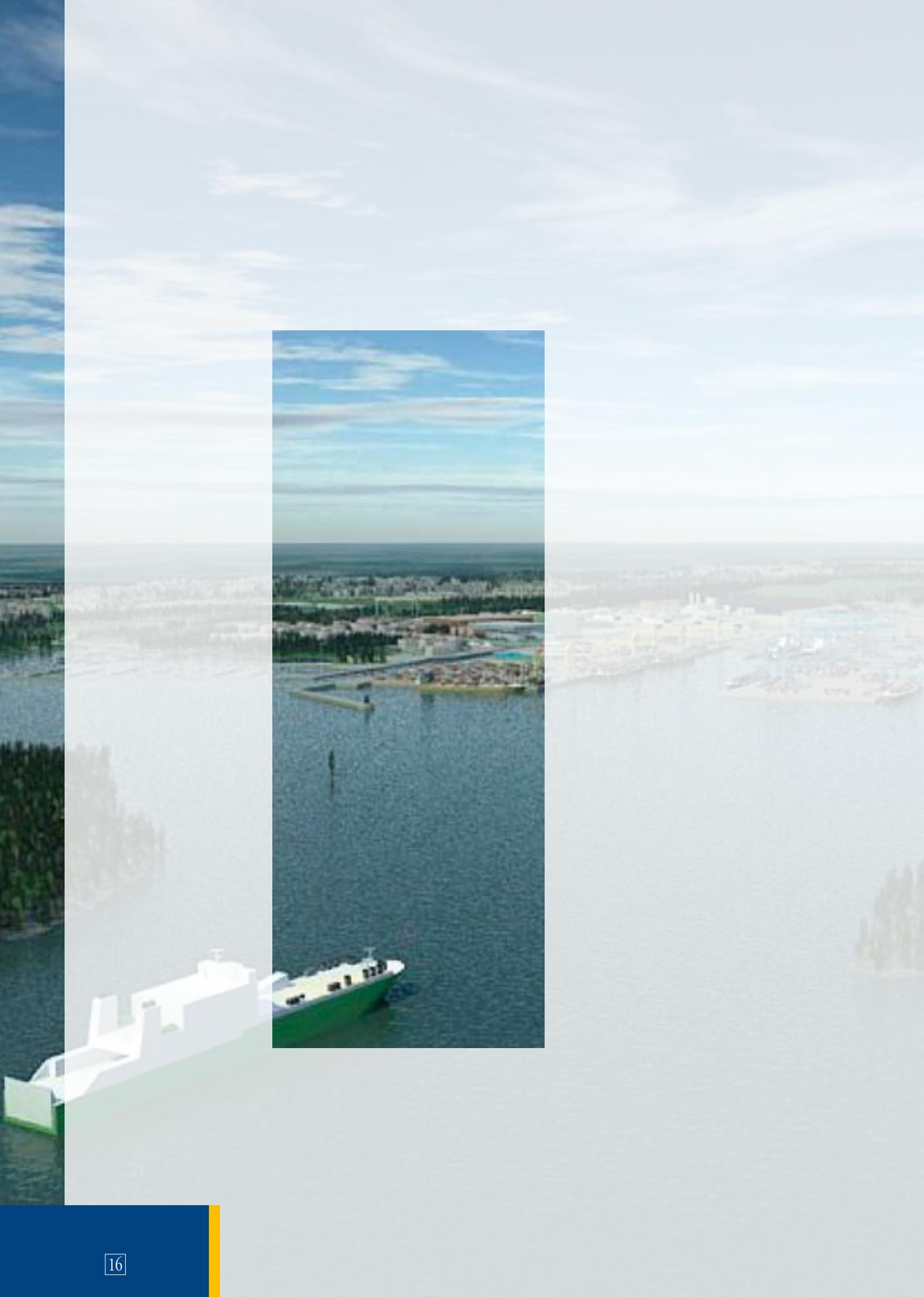
Another concern relates to the drafting of the environmental objectives under the Water Framework Directive, which should deal with proposed new alterations of water bodies (including the construction of new quay walls, capital dredging etc.).

In 2005, ESPO has continued its participation in the Navigation Task Group, an industry-driven group which consists of inland and maritime navigation organisations (PIANC, EUDA, EBU, EFIP, INE). By acting together, the Navigation Task Group tries to bring out a clearer voice towards the European Institutions and Member States on the implementation of the Water Framework Directive with regard to port and navigation issues.

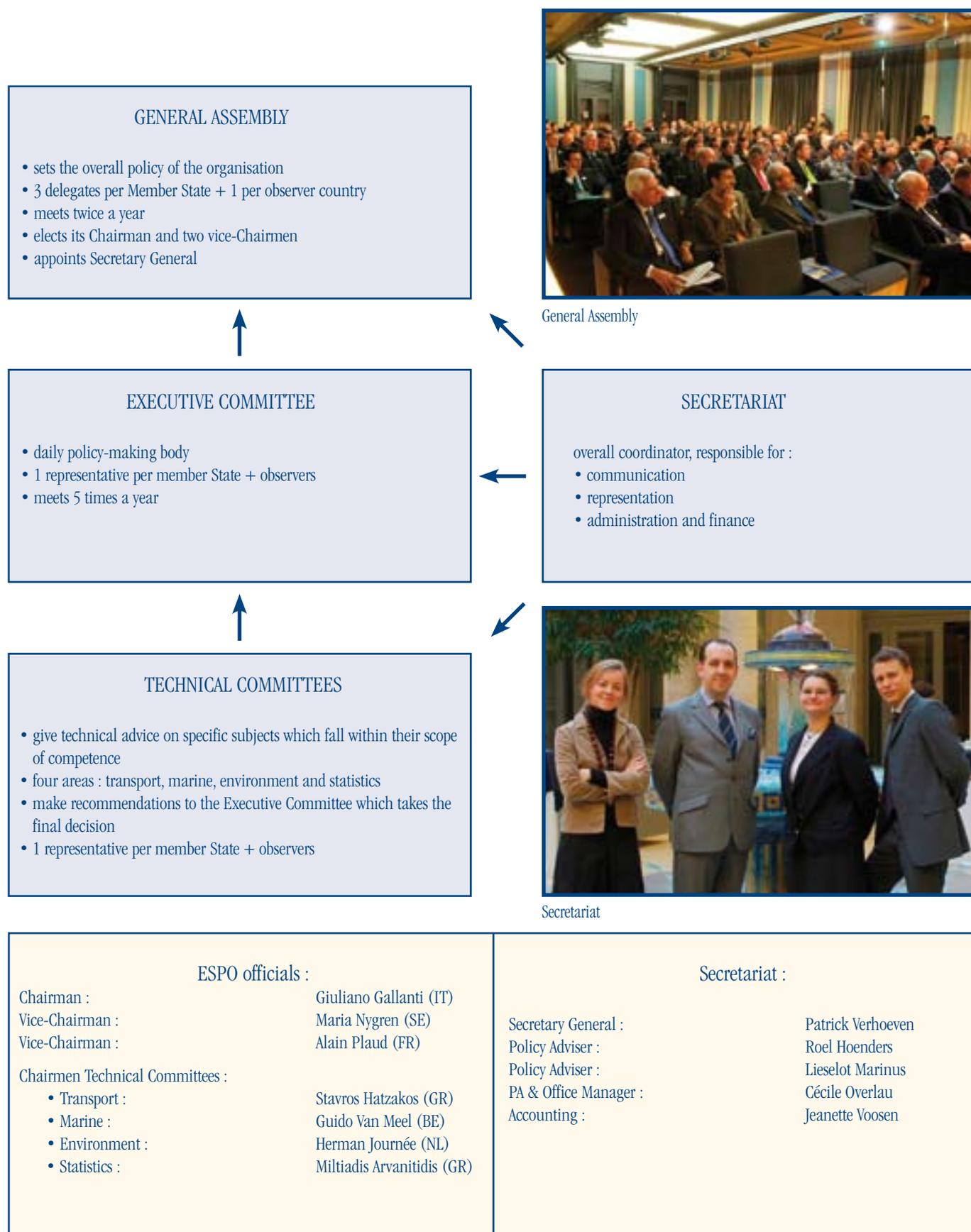
Another factor constraining dredging activities is related to the **Waste and Landfill** Directive. Some ESPO members increasingly encounter problems with disposing the dredged material. Such restrictions block relocating, aquatic disposal and replacement. Some of these unnecessary constraints are due to a lack of understanding on the nature of dredged material and the importance of dredging for European ports.

A substance like dredged material, which is basically a natural resource, should preferably be kept in its environmental compartment by means of aquatic disposal. Only a small part of the dredged material is polluted, thus requiring treatment or landfilling. The very costly procedure of landfilling of dredged material should be a last option, when recycling or re-use is not possible. ESPO believes that dredged material in principle does not constitute waste and should therefore not be treated as such.





Annex 1: Structure of ESPO



General Assembly



Secretariat

Annex 2: Developments in ESPO member-countries

BELGIUM

Representatives in ESPO:

General Assembly: E. Bruyninckx (Antwerp), G. Van Meel (substitute, Antwerp), P. Kerckaert (Bruges-Zeebrugge), P. Van Cauwenberghe (substitute, Bruges-Zeebrugge), E. Van Craeyvelt (Ghent), K. Verslype (proxy Ghent)

Executive Committee: P. Van Cauwenberghe

Technical Committees: Transport: P. Van Cauwenberghe, Marine/Environment: G. Van Meel, Statistics: A. Hurkmans, M. Scheirs

Presentation of the national port sector

There are four seaports in Belgium, all located in Flanders.

Flemish seaports had a very successful 2005. Freight volumes increased in all ports. The strong growth in container traffic was once more apparent.

Port management

The ports of Ostend, Ghent and Antwerp have the status of autonomous municipal companies (i.e. special legal entity founded by law, for which publication of annual accounts is compulsory). The port of Zeebrugge is a limited company.

The 1999 "Port Decree" (Havendecreet) forms the basis of Flanders' port policy. It lays down a number of rules to regulate in a clear and transparent way the relations between the Flemish government and the port authorities. It also gives greater responsibility to the port authorities with regard to the organisation of commercial infrastructure.

Belgian ports are landlord ports. Cargo handling services are provided by private companies, which fix their own prices. Mooring, bunkering and docking are also carried out by the private sector.

Port development

The Deurganck dock was officially opened in July 2005 in the presence of King Albert II. The Deurganck dock will be of crucial importance for enabling Antwerp to continue acting as an efficient hub for international trade in the longer term. All studies and forecasts indicate that container freight will be the main source of growth in international trade over the next decade. The Deurganck dock has a length of 2.6 km and a width of 450 m, with a total mooring length of 5 km, and is able to handle the latest generation of container ships. Once all the terminals in the new dock are operational it will handle an annual volume of more than 7 million TEU.

New plans were elaborated for an optimal nautical access for the port of Ostend.

The new Kluizendock in the port of Ghent is operational since the first quarter of 2005. The dock can accommodate vessels of the cape-size type and has at the moment 200 ha of land available, of which 50% water bound. Of major importance for the port of Ghent is the decision on the construction of a new sea lock in Terneuzen, Netherlands.

In Zeebrugge major investments have been done for the completion of the western outer port area. New facilities were built for container handling. The largest container terminal operators of the world are actively using the port of Zeebrugge. Located directly in the open sea, Zeebrugge is very close to the main shipping routes in North Western Europe. It offers first class intermodal connections including rail and access to the national and European highway systems. The distribution facilities were extended for the distribution of paper products, tyres and new cars. New investments are expected for the expansion of the send-out and storage capacities of the LNG terminal.

Legislative and administrative developments

A strategic policy study, ordered by the Flemish government, for the sustainable development of the ports of Zeebrugge and Ostend has been published.

The Flemish Port Commission held several meetings on the evolution of the second port package proposals.

Fact File: Belgium

Number of ports	8						
Ports over 1 million Tonnes	4	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		187.9	53%	61	23.1	39	41.5
% change p.a.		4.0%	-2.3%	12.7%	1.7%	-5.0%	3.2%

Source: Eurostat, unit G5 - Transport statistics database/own adaptation

BULGARIA (Observer)

Representatives in ESPO :

General Assembly : G. Dereliev (Association of the Bulgarian Ports, Port Operators and Concessionaires), G. Petkov

Fact File: Bulgaria

Number of ports	2					
Ports over 1 million Tonnes	2	Total	SSS (%)	Container	RoRo	Liquid Bulk
Throughput 2004 (million Tonnes)		23.0	72.2%	1.3	0.5	8.5
% change p.a.		8%	2.9%	32.1%	-2.9%	14.1%
						Dry Bulk
						9.9
						7.3%

Source: Eurostat, Unit G5 - Transport Statistics database

CROATIA (Observer)

Representatives in ESPO:

General Assembly: B. Hlaca (Croatian Association of Port Authorities)

Presentation of the national port sector

Croatia counts five main commercial ports, the interests of which are gathered in the Croatian Association of Port Authorities. The port of Rijeka handles general cargo, containers, bulk, oil and passengers. The port of Zadar handles mainly passengers, general cargo and grain. It has a new multi-purpose dry cargo pier and a multi-purpose tanker berth. Main traffic of the port of Split is passengers; chemicals, oil and grain are also handled. The port of Ploče handles general cargo, bulk and liquid cargo. The port of Dubrovnik's main traffic is passengers. It also has a marina reserved for yachts.

Over the last year, Croatian ports have benefited from an uprising trend regarding cargo and passenger traffic.

Port management

Croatian port authorities are non-profit legal persons established by decision of the Government. Such decisions define the port area (maritime domain over which the Port Authority has competence) as well as port activities and infra-/super-structure facilities in the port area for which the Port Authority grants concessions.

All profits made by Port Authority in running business will be used exclusively for the construction and maintenance of the port infra- and super-structure.

The management bodies of the Port Authorities are Administrative boards consisting of a Chairman, seven members and an Executive Director.

Port development

The "Rijeka gateway project" is a major transformation and modernization project of the port of Rijeka which aims to increase its competitive position in the whole transport chain. It has received a loan from the World Bank.

Several development projects have been completed over the last 5 years in the port of Zadar (reconstruction of 200 m of quay, construction of a new pier, new Passenger Terminal). In the next year, the Port of Zadar will start to build a new passenger terminal in "Gazenica".

The Port Authority of Split launched the construction of multipurpose "summer berths" in order to satisfy new market demands resulting from increasing passenger traffic (both ferry and cruise). Furthermore, an enlargement of the berth Saint Peter and reconstruction of operation coast in the Northern Port are envisaged.

After a period of working with decreased capacities due to war conditions in Croatia and Bosnia and Herzegovina, which represents the largest part of the hinterland of the Port of Ploče, several reconstruction and construction activities have been carried out in the port (berths, liquid cargo terminal, Ro-Ro/Passenger terminal, water pipes and power systems, rail tracks, surfaces, roads etc.).

The Port of Ploče Authority is in the phase of planning the construction of a new dry bulk cargo terminal and multipurpose/container terminal which will improve the effectiveness and increase the quality of the service of the port of Ploče.

In 2005 the Dubrovnik Port signed a contract for the first phase of reconstructing and redeveloping the port's infrastructure. The works are expected to start at the beginning of 2006.

Legislative and administrative developments

In 2004, the Government of the Republic of Croatia published several regulations, according to the "Law on maritime domain and seaports", in particular, the Regulation on the procedure for granting the maritime domain and the Regulation on the procedure for establishing the maritime domain limits.

Amendments to the "Law on maritime domain and seaports" are under preparation, as a result of difficulties arising from certain identified inconsistencies in its application and new relationships in the maritime domain use. These amendments are also aimed to ensure compliance with EU legislation. The Ministry of Maritime affairs, Tourism, Transport and Development has established a working group, which will prepare these amendments.

CYPRUS

Representatives in ESPO:

General Assembly: A. Klerides, J. Kokkinos, C. Assimenos (Cyprus Port Authority)

Executive Committee: C. Assimenos

Technical Committees: Transport/Environment: C. Assimenos, Environment: C. Assimenos, Statistics: A. Kitromilidou-Koutsou

Presentation of the national port sector

The main ports of Limassol and Larnaka are multipurpose ports and serve the Cypriot economy at large, while specialized oil terminals at Larnaka, Moni and Dhekelia are used for the handling of petroleum products (mainly imports). The industrial port of Vassiliko handles mostly dry bulk cargo for the needs of the local cement factory. There are also a number of small ports (at Limassol - old port, Paphos and Latchi) that are currently used as fishing and pleasure boat shelters.

Compared to 2004, the level of containerisation of local cargo continued to improve. Furthermore, in 2005, traffic in both Limassol and Larnaka ports increased by about 13%. However, overall traffic through all Cypriot ports and terminals decreased by 7%, mainly due to a reduction in the volume of petroleum imports and a reduction in exports from the industrial port of Vassiliko.

During 2005, the number of ships that called at Cypriot ports remained at the same level as it was in 2004, while in an increase of 7.7% in the movement of cargo was noted. Moreover the loading and unloading of containers (TEU's) in Cypriot ports registered an increase of 6.5% compared to previous year and the total arrivals and departures of passengers recorded an increase of 11%.

Port management

Cyprus Ports Authority (CPA) is a semi-governmental autonomous organization established by law in 1973 for the administration and exploitation of the ports in Cyprus. A Board of Management appointed by the Council of Ministers governs the Authority. The Government and the House of Representatives approve the budget, tariffs and port operating regulations of the CPA.

CPA is responsible for the development, maintenance and operation of the ports of Cyprus.

CPA has under its jurisdiction all ports and terminals in Cyprus.

The private sector plays an important role in the local port industry and specifically in the provision of port services. In particular, various port services, are offered by private entities.

Moreover the Authority's strategy is to transform the role of the organisation from that of operator to that of landlord of the port facilities and regulator of the port services.

Additionally, the intention of the government to introduce institutional changes conforming to European norms, by reconsidering the role of the state in an environment of free competition, is a strengthening factor in the Authority's efforts to involve further the private sector in the local port industry.

Port development

Larnaka port will be redeveloped mainly into a passenger port on a DBFOT (Design, Build, Finance, Operate, Transfer) basis. This process, which is in an advanced stage, will be assigned to a private sector company, under the auspices of the Ministry of Communications and Works.

At Limassol port, a new passenger terminal is expected to be in operation by the end of 2009. With respect to container traffic, the enlargement of the western container terminal's stacking area has been completed, while a heavy duty pavement of 23,000 m² is under construction. In addition planning of the project of expanding the west quay wall of the port by 500 meters and of the project of dredging part of the port sea area to -16 meters which included the stabilization of existing quays have started.

At Limassol Old Port, which will be converted into a fishing shelter, marine and land works are under way.

Finally, enlargement and improvement works have almost been completed at Latchi Port. The port will accommodate both fishing boats and yachts.

Legislative and administrative developments

Based on a relevant provision of the Regulations governing reception facilities and the prohibition of discharging ship waste and cargo residue in the sea (771/2003), the Authority has introduced the regulation concerning the reception facilities charges and later in 2005 it has promoted amendments of these charges.

Fact File: Cyprus

Number of ports	6						
Ports over 1 million Tonnes	3	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		7.0	32.1%	2.0	0.2	2.4	1.3
% change p.a.		-6%	na	25.0%	0.0%	-20.2%	-32.0%

Source: Eurostat, Unit G5 - Transport Statistics database/Cyprus Ports Authority

DENMARK

Representatives in ESPO:

General Assembly: J. Peter Peters (Associated Danish Ports), B. Mathiesen (Aarhus), H. Berthelsen (Association of Danish Ports), T. E. Christensen (substitute, Association of Danish Ports)

Executive Committee: T.E. Christensen

Technical Committees: Transport: G. Nørgaard, H. Munch Jensen, Marine: S. Felix Andersen, K. Møller, Environment: T. Hansen, Statistics: H. Munch Jensen

Presentation of the national port sector

The structure of the Danish port industry is characterised by the fact that it consists of many ports, which, in comparison with other ports in Europe, are small or medium-sized. However, since 75% of Danish exports (measured in terms of tonnage) are handled in Danish ports, the Danish port industry is of great significance to the national economy.

Like in the previous years, the general trend goes towards structural concentration on fewer and larger ports.

Port management

Danish ports are owned by local municipalities. Three different ownership categories exist: communal ports, communal self-governed ports, and stock-based communal ports.

Whatever their status, ports enjoy large business opportunities. Opportunities to operate port services are, however, limited for all three ports categories. Larger ports are either communal self-governed ports or stock-based communal ports.

In 2005 numerous Danish municipalities merged so that the total number of municipalities was reduced from 275 to 98. 80 of the new municipalities have one or more ports within their territory. As many ports are now situated within one municipality, centralisation of port administration is expected for 2006.

Port development

The port of Aarhus will shortly carry out a big infrastructure project, involving the construction of a road tunnel, in order to improve hinterland accesses to the port area. Copenhagen-Malmö port is also planning to implement a road tunnel project in the near future.

The ports of Esbjerg and Grenaa are planning to enlarge the port area due to a continuous increase of container and cruise traffic.

Legislative and administrative developments

Political efforts are made to ensure that Danish ports stand in an equal position with each other with respect to supplying ship-related services. Today, this is not the case as not all Danish ports have such a right.

The new Danish Harbour Act makes it possible for a few selected ports to apply for the right to offer some port-related services.

A new law on liberalisation of pilotage was expected to be presented sometime during 2005. However, this law has been put off so pilotage services will continue to be publicly governed. The main political discussion at the moment focuses on the liberalisation of port services and the shutdown of railway tracks in some of the Danish ports.

Fact File: Denmark

Number of ports	120						
Ports over 1 million Tonnes	25	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		100.0	85.9%	4	22.8	30.4	28.1
% change p.a.		-3%	2.6%	5.7%	4.3%	1.7%	-1.1%

Source: Eurostat, Unit G5 - Transport Statistics database

ESTONIA

Representatives in ESPO:

General Assembly: K. Kiviste, S. Ratassepp, T. Liitmäe (Tallin)

Executive Committee: K. Kiviste

Presentation of the national port sector

Estonia is a maritime country - the length of its coastline (3,800 km) is about 6 times longer than the mainland borderline. There are more than 100 harbours and marinas along the coast of Estonia. About a third of these harbours handle commercial shipping and are open to vessels from other countries.

The Port of Tallinn is the biggest port authority in Estonia and consists of four constituent harbours - Muuga Harbour, Old City Harbour, Paljassaare Harbour, Paldiski South Harbour. A new and fifth harbour in Saaremaa will be completed by spring 2006. It will accommodate cruise and passenger traffic and will be the most distant constituent of the Port of Tallinn.

The ever growing traffic handled by Estonian ports reflects the increasing activity in the Baltic Sea Region. In general, transport and logistics play a vital role in the Estonian economy. Due to its favourable economic and geographical position, Estonia has become a transit gateway for east-west as well as for north-south connections.

Port management

The Port of Tallinn is a limited liability company. The Republic of Estonia owns 100% of its shares and the Ministry of Economic Affairs and Communications manages these shares.

In order to fit effectively into the competitive environment, the Port of Tallinn underwent a complete restructuring process in the mid 1990s by developing from a service port into a port of landlord type. In 1999, the last cargo handling operations were finally given out to private companies.

Today, the Port of Tallinn operates as a landlord port without carrying out any cargo handling operation of its own. It maintains and develops the infrastructure of the port. It also leases territories to terminal operators through building titles and giving the operators incentives to invest in superstructure and technology.

Port development

In order to accommodate the expected growth in the coming years and to ensure competitive advantages in the Baltic region, quite some developments are planned for 2006:

- the reconstruction of passenger servicing facilities in the Old City Harbour (ramp, galleries, traffic scheme);
- the construction of a viaduct and the extension of the eastern part in the Muuga Harbour;
- the extension of railway connections;
- the construction of two new quays in the Paldiski South Harbour;
- the completion of the first phase of the development of the Saaremaa Harbour.

Fact File: Estonia

Number of ports	5						
Ports over 1 million Tonnes	5	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		45.0	82.1%	1	3.1	29.4	6.3
% change p.a.		-5%	-8.0%	-0.4%	-41.0%	6.1%	-6.7%

Source: Eurostat, Unit G5 - Transport Statistics database

FINLAND

Representatives in ESPO:

General Assembly: M Aura (Finnish Port Association), H. Lindelöf (Kotka), H. Nissinen (Helsinki)

Executive Committee: M. Aura

Technical Committees: Transport: M. Aura, Marine: E. Kotiranta, Environment/Statistics: K. Tarnanen-Sariola, Statistics: K. Tarnanen-Sariola

Presentation of the national port sector

Finland is heavily dependent on sea transport. 80% of its foreign trade is transported by sea. The cargo volume in Finnish ports is estimated to decrease for the first time in decades by 8% in 2005. Among other reasons, the drop in cargo volume is largely due to a long labour market dispute within the forest industry during summer 2005.

The port sector is vitally important for the Finnish economy. The transit traffic to Russia enables further growth for the Finnish ports and constitutes 6% of their total traffic volume. About 300,000 cars for the Russian market are annually imported via Finnish ports. One Finnish specificity relates to the fact that, every winter, the Baltic Sea is ice-covered and that access to the ports is kept open thanks to icebreakers.

Port management

There are some 50 ports in Finland. Most of the public ports are municipal ports. Two municipal ports have the legal structure of a private company, although they are 100% municipally owned. The Finnish industry also has some private ports and loading places. It is a basic principle in Finnish port policy that all ports are treated equally irrespective of their ownership structure.

Port authorities do not act as port operators. In every port there are one or more private port operators.

Port development

The biggest development project in the Finnish port industry is the Helsinki Vuosaari harbour project. Helsinki aims to move its port activities from their present location in the heart of the city to the east outskirts, Vuosaari. This project has been heavily discussed both at national and city level. Construction works of port infrastructure as well as waterway, railway and road connections are under way. The Vuosaari harbour will be operational in 2008.

Finnish forest industry companies, which are the Finnish ports' major customers, have rerouted their export flows. All forest companies have limited the number of export ports they use. Fortunately, the different forest companies have chosen different ports as their base export port.



Legislative and administrative developments

A study was carried out, by the Finnish Ministry of Transport and Communication, on the possible need to reform the Finnish port legislation. Work on this reform is likely to start as soon as the fate of the “port services directive proposal” is known.

Fact File: Finland

Number of ports	47						
Ports over 1 million Tonnes	22	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		100.6	93.6%	11.7	12.7	25.5	30.9
% change p.a.		-4%	1.5%	12.8%	9.0%	-16.1%	12.7%

Source: Eurostat, Unit G5 - Transport Statistics database/Finnish Maritime Administration

FRANCE

Representatives in ESPO:

General Assembly: M. Quimbert (Nantes-St Nazaire), J-M Lacave (Le Havre), A. Plaud (UPACCIM)

Executive Committee: A. Plaud

Technical Committees: Transport: M. Bonvalet, Marine: F. Brévault, Environment: M-Y. Le Garrec, Statistics: J.-M. Pietri, J. Braems

Presentation of the national port sector

The following French seaports handle, each, between 7 and 96 million tonnes of cargo per year:

- autonomous ports of Marseilles, Le Havre, Dunkirk, Rouen, Nantes-St-Nazaire, Bordeaux;
- ports of national interest of Calais and La Rochelle.

The annual traffic in each of the overseas ports of Guadeloupe, Martinique, Guyane, Réunion, Papeete (Polynesia) and New Caledonia ranges between 0.5 and 4 million tonnes.

Traffic trends in French seaports for the first nine months of 2005 indicate a global growth of 3%, which results, for a large extent, from the increase of traffic in crude and refined oil products (+5%). General cargo remains at its 2004 level where RoRo traffic compensates for a slight global drop of containerized traffic.

Port management

Six metropolitan seaports and the overseas port of Guadeloupe are currently organised as "ports autonomes" in accordance with a 1965 law. They handle 76% of the total national freight traffic. According to a decree dated 20 December 2004, the seaport of La Rochelle will also become a “port autonome” as from 1 January 2006.

The sixteen remaining metropolitan seaports of national interest, as well as four overseas ports, which, all together, handle 20% of the total traffic, are still under direct State supervision. However, before the end of 2007, all metropolitan seaports will, in majority, be transferred to “régions”, or, in some cases, to “départements”. The commercial operation of non-autonomous ports is usually delegated to Chambers of Commerce and Industry.

New patterns are developing in the market of cargo handling services in French seaports. Proof that access to this market is opening up is illustrated by takeovers of French companies by foreign groups (such as Sea Invest) as well as allocation of new container terminals to consortia including newcomers (such as Port Synergy created by P&O and CMA CGM).

Port development

The “Port 2000” container terminal project in Le Havre is a major development project: the port authority plans twelve berths of 350 m, with draught up to 17 meters. First of all, two berths, with 500-metre wide back-up areas, will be run by a private operator, from March 2006 on. The berths will be accessible from open sea, at any tide.

Two new container terminals, which will be operated by two different private operators, are also expected to be opened in less than 5 years at the FOS 2XL extension project of the port of Marseilles. The transfer of crane drivers, currently working for the port of Marseilles, to the private operator, is currently being negotiated.

Dunkirk's 2004 container terminal extension, with a 16.5 meter draught, already attracts regular calls of a large shipping company. This container terminal is privately run and has its own personnel.

Additional lengths of quays are provided in Rouen and planned in Nantes-St-Nazaire.

One common objective of French ports is to trigger the development of adjacent port-owned logistics zones. The main French ports do now lack space for expansion but laborious processes resulting from the need to balance environmental considerations are a limiting factor in their development projects.

Legislative and administrative developments

The Law N° 2004-809 related to local liberties and responsibilities, dated 13 August 2004, provides for a vast decentralization of responsibilities from the State towards the regional and local governments. This decentralization covers the main roads, airports and ports others than autonomous ports. The transfer of most ports of national interest to the local governments is expected to be completed by 31 December 2007. Overseas ports will remain under the supervision of the state.

Audits and discussions have already started in the regions for each of the sixteen metropolitan seaports. These cover, in particular, the renewal of the delegations of port global commercial operations to Chambers of Commerce and Industry, which are currently terminating. A recent law of 14 December 2005 on 'safety and development of transport' authorises the transfer of existing concessions to new non public "Sociétés Portuaires" (port companies).

Major concerns arose resulting from European Commission rulings ordering the designation of navigation channels in three main French estuaries under the Habitats Directive and Natura 2000 Network. This decision will require agreeing on carefully balanced 'codes of practice' on a European, national and local level in the near future. Special attention in these codes of practice needs to go out to maintenance dredging and the disposal of dredged material.

Fact File: France

Number of ports*	69						
Ports over 1 million Tonnes	19	Total					
Throughput 2004 (million Tonnes)		na	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
% change p.a.		na	65.8%	34	23.8	172.3	80.9
			-1.7%	11.3%	6.7%	0.8%	-4.3%

* figure for 2003

Source: Eurostat, Unit G5 - Transport Statistics database

GERMANY

Representatives in ESPO:

General Assembly: M. Ross (Hamburg), B. Linkogel (Bremen), E. Jagl, (alternate, Lower Saxony), Dr. Wolfgang Zeichner, (alternate, Schleswig-Holstein), K. Richter (alternate, Mecklenburg-Vorpommern)

Executive Committee: M. Ross

Technical Committees: Transport: B. Müller, Marine: A. Mai, Environment: C. Lampe

Presentation of the national port sector

The year 2005 was -again- a very successful year for the German Ports. Especially, traffic handled in the ports of Hamburg and Bremerhaven steeply increased: both ports handled in 2005 twice as much container traffic as in 1999 respective 1998.

In Rostock and Sassnitz, ferry traffic increased. In Rostock also cruise traffic increased.

In Kiel ferry and cruise passenger traffic increased significantly. The total passenger volume grew approximately about 20%. The cargo volume exceeded the result of 2004 slightly. In Lübeck the cargo volume developed nearly constantly in comparison to the previous year whilst the passenger volume increased slightly.

Furthermore, smaller ports could keep their transshipment volumes at about the same level as during the previous year.

Port management

The City of Hamburg has decided to bundle its public port activities in one corporate entity named "Hamburg Port Authority".

Bremen has delegated the port management of the ports of Bremen and Bremerhaven to the private corporation Bremenports GmbH & Co. KG since in 2002.

Niedersachsen has decided to privatize its ports. The private company "Niedersachsen Ports GmbH & CoKG" was founded in November 2004 and is based in Oldenburg.

In other German ports there is no change in port management. Most of them are run as landlord ports and the port administration is usually integrated in the administration of a region or a state. But there are also, especially in Schleswig-Holstein, many ports run by local authorities and companies.

Port development

Most ports in Germany are involved in the planning and construction of new capacities. In Hamburg, substantial and manifold activities to increase capacity have been initiated to satisfy the ongoing growth of demand in cargo handling. The extension of the container quay in Bremerhaven from 3.3 km to 5 km started in summer 2004. The detailed planning and examination of the envisaged waterway adaptations of the Weser and Elbe rivers are in good progress.

In Rostock and in Wismar, the terminals for combined transport are being extended. In Rostock-Warnemünde a new Cruise Center starts at the beginning of the new season in 2005.

In the port of Kiel the planning for a new cruise and ferry center was completed so that the civil works will start in 2006 and end in spring 2007.

In Lübeck the modernisation and enlargement of the infrastructure of the Skandinavienkai is in good process. On Seelandkai Lübeck the construction of two new berths for ConRo-ships began in autumn 2005. The completion is planned for spring 2006. The planning for the new deep-water port in Wilhelmshaven is making good progress.

Legislative and administrative developments

The "proposal for a Directive on market access to port services", presented by the Commission in 2004, initiated intensive discussions and exchange of statements with other European ports and lobby-associations as well as the European institutions during the whole year 2005.

Fact File: Germany

Number of ports	83						
Ports over 1 million Tonnes	16	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		272.0	66%	89.7	31.6	69.0	59.2
% change p.a.		7%	1.2%	13.8%	4.8%	9.4%	-5.1%

Source: Eurostat, Unit G5 - Transport Statistics database/Statistics yearbook 2004-Statistisches Bundesamt Wiesbaden, Fachserie 8, Reihe 5 (pages 21,29)

GREECE

Representatives in ESPO:

General Assembly: A. Kamarinakis (Igoumenitsa), S. Hatzakos (substitute, Piraeus), I. Tsaras (Thessaloniki), D. Makris (substitute, Thessaloniki)

Executive Committee: I. Tsaras

Technical Committees: Transport: S. Hatzakos, Environment: C. Kontogiorgi, Statistics: M. Arvanitidis, V. Michalopoulos

Introduction

Given their location on the eastern side of Europe, ports in Greece serve as a connection network between Europe, Asia and Africa, through the Adriatic, Egean, Mediterranean and Black seas.

All types of cargo are handled in Greek ports. Main traffic is for containers, RoRo, bulk, liquid, petroleum products etc.

Port management

The Greek port sector has very recently changed its model through the conversion of 12 ports into S.A.s (Corporate Bodies). Ports which are concerned by such changes are the ports of Alexandroupolis, Volos, Heraklion, Igoumenitsa, Kavala, Corfu, Laurion, Patras, Rafina, Eleusis, Piraeus and Thessaloniki.

The two major Greek ports, Thessaloniki and Piraeus, have already entered the Athens stock exchange.

As a result of the conversion of the other 10 most important ports into S.A.s, the Ministry of Mercantile Marine received specific property and responsibilities for managing their areas.

A lot of different services are provided in Greek ports, such as ship repair, bunkering, garbage disposal, water provision, banking at pier / terminal, car valet parking, etc.

Port development

An extensive developments' programme took place in many ports, in order to respond to the expected increase of the traffic. The secretariat for ports from the Ministry of Mercantile Marine is the responsible governmental body.

The secretariat for ports from the Ministry of Mercantile Marine was the responsible governmental body for these projects.

Fact File: Greece

Number of ports	188						
Ports over 1 million Tonnes	26	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		158.0	86.5%	17.8	28.9	42.3	37.3
% change p.a.		-3%	-3.6%	-4.4%	-15.2%	-0.6%	2.5%

Source: Eurostat, Unit G5 - Transport Statistics database

ICELAND (Observer)

Representatives in ESPO:

General Assembly: G. Gislason (Reykjavik)

Technical Committees: Marine: G. Gislason

Presentation of the national port sector

Faxafloahafnir sf. (Associated Ports of Iceland) is situated in the Faxaflói bay area in south west Iceland. The main harbour is in the capital area of Reykjavik. The harbour consists of four harbours, the harbour of Reykjavik that is the largest in Iceland, the industrial harbour of Grundartangi, the fishing harbour of Akranes and a small vessel harbour in Borgarnes.

The hinterland of Reykjavik is mostly fully used and developed. Within the port area of Reykjavik future developments will be carried out in the Grundartangi area which has the most possibilities.

Import through ports has been increasing vastly (about 10-15%) in 2005. The increase in export is basically due to the increase of export of aluminium products.

As regards national traffic, ports are concerned about the shift of transport from the sea to the road. The roads are better than before and the effective time for

transport by road has significantly decreased. For the harbours outside of Reykjavik this has had a negative effect on their revenue. However, transport by road is less secure and leads to more pollution.

Port management

Faxaflóahafnir sf. (Associated Ports of Iceland) was founded on January 1, 2005, and took over the operations of the Reykjavík, Akranes, Grundartangi and Borgarnes Harbours under the name of Faxaflóahafnir sf. The owners of the merged company are 10 municipalities in the Faxaflói Bay area, West Iceland. The City of Reykjavík is the biggest shareholder in Faxaflóahafnir sf. with a 75% share.

By merging the separate port authorities into one organisation, the port authorities hope to create a more comprehensive and energetic whole in an altered competitive environment. More emphasis should go to improving specialization, good and efficient services, cost consolidation and economic considerations and to create further growth in the total port area.

Port development

The main projects in the year 2005 were the building of a new 250 m quay in the industrial harbour of Grundartangi and a 500 m quay in Reykjavik. In Grundartangi the project is mainly aimed for the aluminium smelter and a ferocilium smelter. Total transport through the harbour is about 1.0 m tonns. In Reykjavik the quay is for traditional import and export and for cruise ships.

In the old harbour in Reykjavik a project is planned where a new music and conference centre will be build in the years 2007 - 2009. The construction of this centre requires major alternations in the harbour for fishingships and other vessels and renewal of the harbour area for fishingvessels is under way.

As a result of the merger of the four harbours, work is under way to make a new master plan for the whole harbour area of the Associated Ports of Iceland.

Legislative and administrative developments

New port legislation was implemented in Iceland in the year 2004. In the new legislation major changes were made especially regarding the possibility for harbours to operate as private companies. Furtermore state funding was limited and coordinated and state harbour tariffs and cargo dues were abolished.

The main topic now under discussion is the implementation of the ISPS code and the recovery of security costs. The relatively new harbour law is also discussed as the state has formed a committee to review a few matters in the legislation. A new proposal is expected to be introduced during spring 2006.

Fact File: Iceland

Number of ports	53						
Ports over 1 million Tonnes	1	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		5.0	na	na	na	na	na
% change p.a.		9%	na	na	na	na	na

Source: Eurostat, Unit G5 - Transport Statistics database

IRELAND

Representatives in ESPO:

General Assembly: P. Keenan (Irish Ports Association) E. Connellan (Dublin), B. Keating (Cork)

Executive Committee: P. Keenan

Technical Committees: Transport: P. Keenan, Marine: P. Farnan, Environment: D. Healy, Statistics: V. Malcomson

Presentation of the national port sector

Being an island nation, Ireland's ports handle more than 95% - by volume - of the national import and export, with the shipping modes including bulks, bulk liquid, Ro-Ro, lo-lo and break bulk. Fourteen commercial ports handle more than 99% of the traffic, the remaining ports are either regional or fishery harbours. Trade continues to be buoyant, in line with Ireland's growing economy; the main growth areas are the lo-lo and Ro-Ro sectors.

Port management

The largest ports in Ireland are corporatized and state-owned, they operate as independent companies. Each port company has a Chairman and Board of directors appointed by the Minister for the Marine; the board must be representative of the commercial sector, labour interests and local government.

Competition between ports is encouraged and is intense. The port company is also the pilotage authority, with pilots being either licensed or employed. Ports may also be involved in the provision of other port services such as towage, cranes, etc.; although this will usually be in addition to the provision of these services by private operators. Dock labour is organised and supplied by private stevedores.

Port development

With the continuing growth in trade, port capacity is coming under increasing pressure and the Minister has initiated a study to quantify the shortfall in capacity in the short and medium term. In the meantime individual ports continue to plan future developments, with many companies planning major infrastructural projects.

These new developments are all subject to national planning legislation and must also comply with all relevant EU legislation.

Funding must generally be provided by the port company. However, the state can provide a source of residual finance, but only if projects are proven to be high quality self-sustaining projects.



Legislative and administrative developments

On 1 January 2005 the Minister for the Marine published the long awaited Government Ports Policy Statement. The ports policy aims to better equip the ports sector and its stakeholders to meet national and regional capacity and service needs through better transport policy coordination and through clearer and more focussed commercial mandates for the ports and their Boards. It goes on with the reform of the structure of port Boards, encouragement of private sector investment in ports, better consultation and dispute resolution between port companies and users, and encouragement of mergers where a business case exists.

Fact File: Ireland

Number of ports	21						
Ports over 1 million Tonnes	7	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		48.0	81.6%	7	10.6	13.3	14.8
% change p.a.		3%	1.2%	6.8%	7.2%	2.7%	-1.3%

Source: Eurostat, Unit G5 - Transport Statistics database/Ireland Central Statistics Office

ITALY

Representatives in ESPO:

General Assembly: T. Affinita (Assoport), F. Nerli (Assoport), L. Robba (Assoport), G. Gallanti (Genoa)

Executive Committee: F. Nerli

Technical Committees: Transport: L. Robba, Marine: P. Ferrandino, Environment: P. Ferrandino, G. Di Luca, Statistics: O. Giannotti, F. Bugliani

Presentation of the national port sector

There are about 30 main Italian commercial ports (in terms of traffic volumes, number of maritime services which are provided, infrastructure and equipment available). Most of them are directly linked to the main national and European rail/road axis.

Despite the slow down of the Italian economy, according to the 2005 provisional port traffics data, Italian ports have seen an increase in the volumes of goods they handle, as well as in the number of TEUs and of passengers embarked and disembarked. The number of cruise passengers has also increased and this sector has, in certain cases, benefited from a very significant positive trend.

More over, over the last three years, new Short Sea Shipping and national cabotage maritime services have been started up.

Port management

Seaports are public domain assets and are therefore owned by the State and inalienable. In the main Italian seaports "Port Authorities" have been established since 1995, which are non-economic public bodies and are subject, on some issues, to the control of the Ministry of Infrastructures and Transports.

Port Authorities are not responsible for the direct management of the economic activities (i.e. cargo loading/unloading and supply services to ships). These are carried out by private companies. Their main functions relate to policing, programming, coordinating, promoting and controlling the economic and industrial activities that are carried out in the port; maintaining the common parts and programming and port planning. They are responsible for administrating the port areas and quays and grant authorisations to private undertakings.

Port development

During the period 1995 to 1998, little resources were released for the maintenance and renewal of Italian ports (with a few exceptions). Therefore, the State is, today, making funding available in order to finance essential renewal and requalification works in ports run by the Port Authorities, as well as in a few other major ports.

On the basis of their strategic plans, Port Authorities have selected areas where they wish to dedicate this financing. Specific focus is on the development and renewal of quays and dredging activities. In addition, particular attention is given to the development and improvement of the connections between the ports and the rail/road networks as well as to logistical needs.

The planning process concerning major port works requires agreement from local administrations on the port regulatory plans. They are also subject to strict and complex environmental regulations. Both factors lead to delays in the process and in the realization of the works.

Legislative and administrative developments

A debate has been initiated, between the political institutions and interested parties, on possible amendments to the existing legislation, in order to accelerate, as far as possible, the approval of the port regulatory plans and to make the role of Port Authorities more effective.

Any legislative change resulting from this discussion will, in any case, not affect the characteristics and functions of Port Authorities as non-economic public bodies. By now the discussion reached the Chamber of Deputies, one of the two Houses of the Italian Parliament.

Moreover, in light of the developments at EU level, national debates pay specific attention to the "Motorways of the Sea" and Short Sea Shipping issues.

Fact File: Italy

Number of ports	123						
Ports over 1 million Tonnes	43	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		485.0	75.1%	76.2	50.9	226.9	90.5
% change p.a.		2%	-3.4%	15.7%	8.1%	-2.9%	3.2%

Source: Eurostat, Unit G5 - Transport Statistics database

LATVIA

Representatives in ESPO:

General Assembly: L. Loginovs, V. Makarovs, I. Gorbatikova (Riga)

Executive Committee: L. Loginovs

Technical Committees: Environment: I. Cabe, S. Lizuma

Presentation of the national port sector

Latvia enjoys favourable geographical location on the Eastern coastline of the Baltic Sea and has been interface for trade flows between East and West for a long time.

The efficient infrastructure capacities of the three biggest ports (Ventspils, Riga, Liepaja), combined with the powerful rail infrastructure, account for the increasing amounts of transit passing through Latvia. Compared with its neighbouring countries, Latvia has highest rate of transit cargo. 80% of all cargo handled in Latvian ports goes to or comes from Russia and other CIS countries. The Latvian government has placed promoting such transit cargo as one of the top transport policy priorities.

The ports of Latvia and the extensive railway and road network of the country are included in the Pan-European transport network and provide good links to most places in Eastern Europe.

Port management

Under the existing legislation there are several national laws and by-laws that regulate the functioning of the port. The "Law on Ports", adopted 1994 is an umbrella law and formulates general terms. In addition, separate laws on each of the three big ports define business terms more specifically. Finally, there is a law on the application of taxes in the freeports, equally binding for Ventspils, Riga and Liepaja.

Latvian ports operate as landlord ports. According to this management mode the port authority is in charge of public infrastructure (land, breakwaters, moles, water basin, berths). Core functions of the port authorities include general port planning, infrastructure development and maintenance, lease of land, ensuring of navigation safety, management of the environment and control and prevention of pollution, issuing of the free zone licenses, monitoring of compliance of business activities to legislation etc.

Port authorities act as non-profit organizations: their financial resources can be solely directed at port development while business operations (cargo handling, processing) are carried out by private companies.

Port development

Main development projects in the Freeport of Riga are:

- construction of new oil products terminal in Daugavgriva area;
- construction of new oily waste water treatment facility;
- development of Mangalsala area into a general cargo handling area;
- implementation of industrial parks in Spilve meadows;
- reconstruction of the passenger terminal;
- implementation of the strategy of moving port business away from the centre of the city and transformation of Andrejsala area into city services industry facilities.

All development projects are being thoroughly examined to be in compliance with environmental requirements. Public discussions involving citizens are being held for projects possibly affecting residential areas of the city.

Legislative and administrative developments

Major ports of Latvia are united in Latvian Ports Association since 1999 in order to express common needs to the Government, municipal or state authorities.

Active discussions on the EU proposed Directive on Market Access to Port Services are taking place within the Latvian Port Council that coordinates the state policy regarding the development and the operation of all ports in Latvia. The Latvian Port Council is led by the Prime Minister and is comprised of head officials of the ministries, municipalities and professionals operating in the port sector.



Fact File: Latvia

Number of ports	4						
Ports over 1 million Tonnes	4	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		55.0	79.4%	1.0	1.0	22.4	19.7
% change p.a.		0%	na	-25.6%	-43.7%	-8.9%	4.4%

Source: Eurostat, Unit G5 - Transport Statistics database

LITHUANIA

Representatives in ESPO:General Assembly: S. Dobilinskas, V. Lukosevicius (Klaipėda)Executive Committee: S. DobilinskasTechnical Committees: Transport/Environment: A. Drungilas**Presentation of the national port sector**

Klaipėda port is the only seaport in Lithuania. Due to its favorable geographic location, Klaipėda State Seaport is the northerner ice-free port on the eastern coast of the Baltic Sea. It is the biggest and most important Lithuanian transport hub connecting sea, road and rail routes from East to West.

International RoRo, container, general cargo and ferry traffic is handled in Klaipėda port, which is connected to Denmark, Sweden, Germany, Latvia, England and other countries. Shipping lines calling at Klaipėda port operate services between the ports of Western Europe, South-East Asia and the American continent.

Main hinterland for Klaipėda port is Belarus, Russia, Kazakhstan and Ukraine, areas which are major trade sources.

According to 2005 provisional statistics, the turnover for most types of commodities has increased since last year. Noteworthy, however, is an exceptional growth in RoRo and container traffics.

Port management

The Klaipėda State Seaport Authority (KSSA) is a State enterprise which acts as a landlord. It is in charge of the maintenance and development of the port infrastructure and offers land infrastructure to private companies, which own superstructure and provide services.

Other functions of the Port Authority are:

- ensuring safe navigation within the port waters as well as environmental safety;
- continually developing and improving infrastructure;
- promoting the port nationally and internationally;
- elaborating projects for the general development of the port.

Port development

In 2005 the entrance channel dredging project was completed. Presently, the channel is 14,5 m deep at the port entrance, 14m deep to quay 10 and 13 m deep to quay 79. The last stage of the dredging project will be completed in the beginning of 2006, then the whole port channel depth will be 13 meter deep.

Moreover, a new container terminal is under construction, old quays are being reconstructed and new quays are being built in several areas of the port. The construction of a passenger and cargo terminal is foreseen in 2007.

All projects aim to improve the conditions and quality of the services rendered by the port of Klaipėda as well as to increase the port's technical capacity.

Legislative and administrative developments

The new order of the Minister of Transport of Lithuania, Nr. 3-366, of 26 August 2005, lays down the new regulations on applying discounts on the port dues which are applicable to certain types of cargo in the port of Klaipėda.

Fact File: Lithuania

Number of ports	1						
Ports over 1 million Tonnes	1	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		26.0	84.1%	1.5	2.9	14.8	6.2
% change p.a.		-15%	6.0%	38.8%	-6.1%	-16.5%	27.4%

Source: Eurostat, Unit G5 - Transport Statistics database/Statistics Department of the Republic of Lithuania

MALTA

Representatives in ESPO:

General Assembly: C. Schembri, C. Abela, D. Bugeja (Malta Maritime Authority)

Executive Committee: C. Schembri

Technical Committees: Transport: C. Abela, Marine: D. Bugeja, Environment: G. Galea, S. Schembri, Statistics: J. Bongailas

Presentation of the national port sector

There are two ports in Malta dealing with international maritime traffic to the island, Valetta and Marsaxlokk. Overall shipping activity in Maltese ports has remained consistent with the previous years without registering any major increases or decreases. The corresponding gross tonnage of vessels visiting Maltese ports has increased by about 6%. This continues to confirm that there is a trend that Maltese (MMA) shores are being visited by the bigger vessels in the industry.

An analysis of the passenger market in Malta shows that there has been a 20% and a 25% drop in the number of cruise liners and passengers, respectively, over the last year. On the other hand, the number of ferry passengers has registered an increase of 24%. In respect of cargo throughput there has been an increase of 10%, with the major increases being in the container and petroleum product throughputs.

Port management

The ports industry is regulated by two government agencies. The Malta Maritime Authority (MMA) is considered as the port authority for all ports in Malta and is responsible for navigational aspects and general port development. On the other hand the Malta Freeport Corporation is responsible for the licensing of companies operating within the free zones in Marsaxlokk.

Through the last year there have been several initiatives that continued to involve the private industry in port operations. A port reform process is underway to carry out the necessary changes and adjustments on the way things are carried out by all those employed in the industry – not only the workers but also the government agencies, and the private and public service providers and port users. As part of this process, the Authority and the Government are reviewing the encouraging interest received from bidders for the terminal operations in the port of Valletta.

Once this process is completed the provision of port services would be wholly provided by the private industry and the MMA shall further consolidate its position as a regulator and facilitator for the provision of services in ports, that would include the monitoring of service contracts, and together with the shipping and port communities, embark on initiatives that focus on the promotion of the ports through research, development and innovation.

Port development

The MMA has embarked on an ambitious project to identify new areas for port development. As a first step the Authority is in the process of commissioning a number of contracts to carry out feasibility studies, environmental impact assessments and geotechnical studies of such expansion and development projects. These studies are partly financed by the EU and their conclusions shall help the Authority to participate fully in the development of Motorways of the Sea projects. The Authority is presently involved in the dredging of the port of Marsaxlokk to deepen the approaches to the terminals and the construction of new passenger terminals within the ports dealing with local inter-island traffic. To further enhance maritime safety in the ports and territorial waters the MMA is also in the final stages of concluding a contract for the procurement of a Vessel Traffic System.

The private industry is also investing heavily in port superstructures. In fact the new container terminal operator has already procured new gantry cranes and terminal equipment and is in the process of expanding its storage areas. On the other hand the passenger terminal operator is in the final stages of completing the construction of the new passenger terminal and the refurbishment of the Valletta waterfront.

Legislative and administrative developments

The primary legislation that had to be implemented related mainly to the transposition of the EU Acquis, including that in respect of vessel traffic monitoring, security measures in ports and ports reception facilities for the disposal of ship generated waste.

The successful implementation of this legislation required upgrading and training of port personnel and the commitment of port users and service providers. This required the Ports Directorate to restructure most of its modus operandi and the redrafting of its business plans that encompass the timely and practical enforcement of legislation and initiatives that are conducive towards gradually facilitating and increasing trade and maritime activities in ports.

In order to be in a better position to promote the ports industry, attract new business and further maximize on the ports potential, the MMA has during 2005 been involved in the establishment of a Shortsea Promotion Centre and the conclusion of a Memorandum of Understanding and submission of proposals for the development of Short Sea Shipping and Motorways of the Sea with neighbouring EU countries.

Fact File: Malta

Number of ports	2						
Ports over 1 million Tonnes	2	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		3.0	79.4%	0.8	0.2	1.1	0.8
% change p.a.		2%	na	11.8%	-18.7%	-12.1%	-16.1%

Source: Eurostat, Unit G5 - Transport Statistics database

THE NETHERLANDS

Representatives in ESPO:

General Assembly: H. Gerson (Amsterdam), P. Struijs (Rotterdam), J. Van Asch (Zeeland Ports)

Executive Committee: P. Mollema

Technical Committees: Transport: B. Janssen, Marine: S. Doves, Environment: H. Journée, R. Dekker, Statistics: L. Monninkhof, H. Fonteijn

Presentation of the national port sector

The image of the Dutch ports community is dominated by the mainport of Rotterdam and its neighbours in the Rhine and Meuse delta area: Maassluis, Vlaardingen, Schiedam, Dordrecht and Moerdijk.

The docks of Amsterdam, Zaanstad, Beverwijk, Velsen/IJmuiden, Corus Ltd and Zeehaven IJmuiden Ltd along the North Sea Canal constitute the second largest port area in the Netherlands.

The ports of Vlissingen and Terneuzen along the Scheldt estuary and along the Gent-Terneuzen Canal come third.

The fourth Dutch port area is situated in the north of the country around the western part of the Wadden Sea where the ports of Delfzijl, Eemshaven, Harlingen and Den Helder are situated.

The total throughput of the Dutch ports increased from 380 million tonnes in 1995 to 470 million tonnes in 2004: a 24% growth. Containers and RoRo contributed, they respectively increased by 55% and 58%. Over this period dry bulk, liquid bulk and general cargo grew by 12%, 24% and 2%.

In 2005 the Port of Rotterdam had a through put of 369 million tonnes, almost 5% more than in 2004. More precisely container throughput increased by 12% up to 9.3 million TEU. A record was established with regard to mineral oil products, containers and other liquid bulk.

Port management

Originally the Dutch ports are municipal ports. Most of them still are in one way or another.

Since 1 January 2004 the port of Rotterdam is managed by the Port of Rotterdam Authority, a government corporation. The municipality of Rotterdam is still the major shareholder. In the future, the state will also be a shareholder.

The port of Amsterdam is managed by a separate municipal undertaking; whereas the nautical authority for the North Sea Canal Area is executed by the regional public body CNB.

A number of other ports is managed by a harbour board, a separate public body in which several municipalities co-operate together with the province concerned. Groningen Seaports, Moerdijk and Zeeland Seaports are harbour boards. Zeehaven IJmuiden Ltd manages three tidal docks just south of IJmuiden locks. Private companies hold a majority of the shares.

The management of all other ports is integrated in the public service of the municipality concerned.

In the Dutch ports services like pilotage, towing, mooring and stevedoring all are offered by private organisations/companies.

Port development

Rotterdam is awaiting the final go ahead for the construction of the second Maasvlakte. The start of this 2,000 ha port extension project has been postponed among others to fulfill all EU Birds- and Habitats Directives requirements. Until the first land is available (2012/2013), an extra capacity of some 6 million TEU, is created on the present Maasvlakte. ECT and APM extend their present terminals and the construction of the new EuroMax terminal started this year.

The Ceres Paragon Container terminal at Amsterdam recently welcomed its first customers. A rapid growth of the containerised cargo flow is expected, increasing the need for a second large lock at IJmuiden.

Both in Rotterdam and Eemshaven the construction of LNG terminals is planned or studied.

The province of Zeeland prepares a change of its regional plan to accommodate a Western Scheldt Container Terminal at Vlissingen. A previous plan was rejected because not all the requirements of the EU Birds- and Habitats Directives were fulfilled.

Legislative and administrative developments

On 1 October 2005 the revised "Natuurbeschermingswet" (Nature protection law) came into force, fully implementing the EU Birds- and Habitats Directives in the Dutch legislation and administration.

Over the last decades air quality in the Netherlands has improved significantly. Nonetheless the standards of the EU Air Quality Directives for fine particles and NO₂ are not met in most of the country and/or so called 'hotspots'. Additional measures and revised legislation are being considered.

Following the adoption of the EU Directive on the security of port areas, the "Havenbeveiligingswet" (Law on Port Security) will be revised.

Based on the temporary "Experimentenwet Stad en Milieu" (Experimentlaw on Cities and their Environment) port-city development schemes were carried out in Scheveningen and Vlaardingen. Recently this law has been replaced by a more permanent "Interimwet Stad en Milieu".

Fact File: Netherlands

Number of ports	45						
Ports over 1 million Tonnes	10	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		441.0	57.7%	66.3	16.2	189.8	145.5
% change p.a.		7%	3.5%	17.5%	3.8%	8.0%	5.2%

Source: Eurostat, Unit G5 - Transport Statistics database

NORWAY (Observer)

Representatives in ESPO:General Assembly: T. M. Pedersen (Norwegian Ports Federation), A. S. Hamran (Oslo)Executive Committee: R. MjøsTechnical Committees: Transport: R. Mjøs, Marine: H. Grytbakk, Environment: T. Jørgensen, Statistics: C. T. Svendsen**Presentation of the national port sector**

Norway has a coastline of 2700 km and about 300 communities bordering coastal waters. In several regions public ports join together under a common inter-municipal port administration, thus about 80 communities are organized in approximately 60 port authorities and port administrations. 51 of these port administrations are members of the Norwegian Port Federation.

The Norwegian ports mainly serve national needs, but the port of Narvik serves as an important export port for the iron ore mining industry of Kiruna, Sweden.

The use of sea transport has a long tradition in Norway and is of great significance. About 95% of foreign trade is transported by sea and for domestic transport the figure is 48%. The amount of cargo handled in Norwegian ports increased by 10% in 2004, mainly due to an increase in export of iron ore and of alloy.

Port management

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. Each municipality is in charge of their port district ruled by the Port Act. A municipal port authority shall be organised either as an autonomous municipal enterprise or as an inter-municipal legal liable enterprise.

Financing of port activities is based on the principle of self-financing. The public port areas are landlord owned by the respective port authority. Private operators and stevedore companies carry out cargo handling operations.

The last years there has been a tendency to merge port authorities by establishing inter-municipal port authorities.

Port development

The main Norwegian port development project is in Hammerfest, in the north of Norway. The oil company Statoil is developing a huge gas field (called Snøhvit – Snow-white) in the open sea outside North Cape. The port of Hammerfest, in cooperation with Statoil, is building a new and modern port with the aim to provide services and to satisfy the general needs for the local community as well as the needs of the gas plant and offshore activities of Statoil.

In Risavika, which is situated south of Stavanger, the port authority, in cooperation with private operators is engaged in development of a new port called Risavika Havn As. The port of Ålesund is developing a new port area for bulk and containers outside the central town area. The port of Oslo is developing a new container terminal located outside the Oslo city center. The former port areas in the city center will be redeveloped for urban purposes. Both the port of Arendal and of Grenland have started development works for new port areas.

There are also various ongoing projects in new port areas in several ports. The main objective for these projects is to increase capacity and to gain space so as to allow modern and more efficient cargo handling.

Legislative and administrative developments

It was expected that a proposal for the revision of the Port and Seaway Act would be put forward to the Parliament in 2004. The work has been delayed and it is presumed that a proposal will be presented in 2006. Important questions will relate to the organisation and financing of the Norwegian ports.

The implementation of the ISPS Code has caused a lot of discussion among the port users and the societies surrounding the ports. The main topic of the discussions has been whether or not there is a good accordance between the costs related to the security measures and the effects of such security measures.

For Norwegian ports, the issue of including port activities in the added value tax system, has a high priority as this would make it possible to reduce the costs of port services to the port users.

Fact File: Norway

Number of ports	66						
Ports over 1 million Tonnes	21	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		198.0	79.0%	4.3	5.9	105.1	50.2
% change p.a.		6%	-1.5%	12.1%	15.2%	3.2%	23.6%

Source: Eurostat, Unit G5 - Transport Statistics database



POLAND

Representatives in ESPO:

General Assembly: A. Kasprzak (Gdansk), D. Rutkowski (Szczecin-Swinoujscie), J. Wielński (Gdynia)

Executive Committee: R. Wocial

Technical Committees: Transport: K. Gromadowski, Environment: P. Sikorski

Presentation of the national port sector

The importance of the Ports of Gdansk, Gdynia and Szczecin Swinoujscie goes beyond the regional level and they play an essential role for the Polish national economy. The central geographical location of Polish ports in the southern coast of the Baltic Sea, as well as their convenient connection to the trans European Transport Network (TEN), give a good chance to those ports to become important land-sea logistic platforms for both national and transit (North-South and East-West) traffic.

The ports of Gdansk, Gdynia and Szczecin-Swinoujscie handle about 90% of all Polish maritime transport. The general trends of traffic observed during the year 2005 show dynamic developments concerning the handling of various groups of cargo.

All three port authorities expect to achieve by the end of 2005 an increase of total cargo throughput ranging from 9 to 10%, compared to the results of 2004.

Port management

The major Polish seaports of Gdansk, Gdynia and both Szczecin-Swinoujscie are each managed by a landlord type port authority. These port authorities are joint stock companies in which the State Treasury is a majority shareholder.

All three port authorities continue their efforts to complete the privatisation of their operational services. In 2005 the port of Gdynia sold 100% of its shares of the Baltic Grain Terminal to the consortium ADM/CEFETRA.

Port development

The major ongoing projects in Polish ports are the following:

Port of Gdynia: development of the Kwiatkowski flyover and reconstruction of J. Wisniewski road which will link the port of Gdynia to the Gdansk-Gdynia ring and the national road network. Construction of the new Gdynia Container Terminal (400 thousand TEU p.a.), owned by Hutchinson Port Holdings.

Port of Gdansk: construction of DCT Gdansk S.A. of the Container Terminal (500 thousand TEU p.a.). The expected date for starting operations is June 2007. Extension of the berthing capacity and reconstruction of the road access within the Inner Port (containers, general and bulk terminals).

Port of Szczecin-Swinoujscie: construction of port infrastructure for the container terminal (70 thousand TEU p.a.). The planned date for investment finalization is 2007. Construction of the Westpomeranian Logistic Centre (ZCL).

Fact File: Poland

Number of ports	13						
Ports over 1 million Tonnes	5	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		52.0	na	3.0	3.3	14.1	23.9
% change p.a.		2%	na	13.7%	11.2%	14.9%	-1.4%

Source: Eurostat, Unit G5 - Transport Statistics database

PORTUGAL

Representatives in ESPO:

General Assembly: M. Frasilho (Lisbon), NN

Executive Committee: M. Frasilho

Technical Committees: Transport: A. Santos Gomes, Environment: J. Brazuna Fontes

Presentation of the national port sector

From a geographical point of view, Portuguese ports are grouped into Continental and Autonomous Regions (Madeira and Açores Islands) ports. The main ports on the Continent are: Leixões, Aveiro, Lisboa, Setúbal and Sines. The secondary ports on the Continent are: Viana do Castelo, Pêso da Régua (on the Douro river), Figueira da Foz and Faro. The ports of Madeira are: Funchal, Caniçal and Porto Santo. The ports of Açores are divided in 3 groups: S. Miguel and Sta Maria, Terceira and Graciosa, and Triângulo Ocidental.

Port management

The main ports on the Continent and the ports of Madeira and Açores Islands are managed by limited companies, the only shareholder being the State. All have an S.A. status.

The secondary ports on the Continent are managed by the Port and Maritime Transports Institute, which is a Public Institute. The port authorities are responsible for the economic, financial and patrimonial management of the ports under their jurisdiction, the management of their employees and the running of the ports as well as their complementary, subsidiary or ancillary activities.

Even if pilotage falls under the ruling of the port authorities, pilots however have independence in technical matters, under the supervision of the Port and Maritime Transports Institute. Pilotage is mandatory in all ports, but Pilotage Exemption Certificates are possible under certain conditions.

Vessel towage operations are carried out by the port authorities or by private firms. Mooring services are the responsibility of the port authorities or private firms.

Port development

The development of the electronic handling of manifests and other declarations is led by Leixões, Lisbon and Sines, in cooperation with the Customs Authorities. Aim is to extend the project to other ports.

Main development projects have been carried out in the following ports:

Leixões: dredging to minus 12 m and increasing the bridge span so as to allow vessels with panamax beam into the inner docks; construction of the Multipurpose Terminal for Short Sea Shipping.

Aveiro: railway access and multimodal platform at Cacia. This project comprises: the construction of a multimodal platform for commodities, located at Cacia (Aveiro), the construction of the railway connection of Aveiro Port to the Northern Line, through a stretch of 8,8 lkm; the construction of railway connections to the various terminals of the port area (finished).

Lisbon: construction of the Alcântara Rail Interchange and of the new passengers terminal.

Setúbal: expansion of the RoRo terminal.

Sines: improvements of rail and road accessibilities. Establishment of a ZAL-Logistic Activities Zone.

Legislative and administrative developments

The following main topics were under political discussion in Portugal in 2005:

- the security of the supply chain;
- environment and the interface between the port and its surrounding city;
- the SafeSeaNet project (which is aimed at developing a European Platform for Maritime Data Exchange between the maritime administrations of members States).

Fact File: Portugal

Number of ports	10						
Ports over 1 million Tonnes	6	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		59.0	65.2%	8.1	0.4	27.5	17.1
% change p.a.		3%	-1.5%	3.0%	5.5%	3.1%	2.8%

Source: Eurostat, Unit G5 - Transport Statistics database

SPAIN

Representatives in ESPO:

General Assembly: M. Navas (Puertos del Estado), M. Moron (Algeciras), R. Gomez-Ferrer (Valencia)

Executive Committee: M. Navas

Technical Committees: Transport: A. Rodríguez Dapena, S. Garcia-Mila, Marine: P. Roman, M. Chao, Environment: A. Guerra, F. Torres, Statistics: T. Goiri, J. Sanchez Segovia, J. Maganto Lopez

Presentation of the national port sector

The stated-owned port system in Spain consists of 46 ports of general interest, which are managed by 27 port authorities.

The 27 Spanish port authorities are the following: La Coruña, Alicante, Almeria-Motril, Aviles, Bahía de Algeciras, Bahía de Cádiz, Baleares, Barcelona, Bilbao, Cartagena, Castellón, Ceuta, Ferrol-San Cibrao, Gijón, Huelva, Las Palmas, Málaga, Marin y Ría de Pontevedra, Melilla, Pasajes, Santa Cruz de Tenerife, Santander, Sevilla, Tarragona, Valencia, Vigo, Vilagarcía de Arousa.

Port management

Puertos del Estado is the Spanish state ports agency responsible for the coordination and efficiency control of the 27 port authorities. It depends from the Ministry of Transport and Public Works and is entrusted with the execution of the government's port policy.

The legislation provides the Spanish port system with the necessary instruments so they can have a competitive position in an open and global market. The law gives extensive self-management faculties to the port authorities, which must be run on commercial business criteria.

Within this framework, the port authorities are organised according to the landlord model, meaning that they do not only provide land and infrastructure, but that they also coordinate the interests of the service providers, which may, in some cases, be conflicting. Moreover, the port authorities stimulate and promote the provision of services of a high quality/price ratio, with the ultimate aim of improving their ports' competitiveness.

Port development

In 2005, the Spanish state-owned port system maintained the level of investments of the last few years, with financing reaching 782.8 million euros.

Ports investments are divided as follows:

- infrastructure and port capacity: 74%
- logistics activities, equipment and facilities: 9%
- port-city and environment: 3%
- fishery facilities: 2%
- passengers: 1%
- others: 11%

Legislative and administrative developments

Taking into account the Spanish port model described above, the objectives of the government's port policy for the near future include the following aspects:

- revising the port system's financing (including simplification of port taxes);
- considering port services of a public nature, without affecting the provision of port services by private undertakings;
- incorporating the above-mentioned guidelines for port policy into the planning and execution of the national transport policy.

Fact File: Spain

Number of ports	27					
Ports over 1 million Tonnes	26	Total	SSS (%)	Container	RoRo	Liquid Bulk
Throughput 2004 (million Tonnes)		373.0	55.1%	86.2	18.9	134.5
% change p.a.		8%	-8.8%	13.1%	8.0%	3.5%
						Dry Bulk
						102.5
						4.6%

Source: Eurostat, Unit G5 - Transport Statistics database

SWEDEN

Representatives in ESPO:

General Assembly: L. Karlsson (Copenhagen Malmö Port), E. Nilsson (Göteborg), M. Nygren (Ports of Sweden), C. Hök (substitute, Ports of Sweden)

Executive Committee: M. Nygren

Technical Committees: Transport: C. Hök, Marine: A. Klingström, Environment: A. Wilske, Statistics: P. Hansson, C. Hök

Presentation of the national port sector

From a transportation point of view, Sweden is in effect an island nation. Due to its peripheral situation in a northern corner of Europe, with the longest coastline in Europe and with trading partners far across the sea, Sweden relies heavily on efficient maritime links. Thus, nearly 95% of the Swedish foreign trade is transported by sea.

Some 50 public ports are spread over the extended coastline. They vary as regards their size and the services they offer, ranging from small specialised ports to ferry ports and large full service ports.

Port management

In an international context Swedish ports are rather unique, since in most of them the infrastructure is managed by a port company which also provides stevedoring services. This development started already in the 1980s and has since continued. The majority of port companies are owned by the city. They are limited companies, which sometimes own the infrastructure but normally rent the land on commercial terms from the owner. The limited companies were created as a result of a merger between the former port authority and the stevedoring company.

The aim, through the mergers, was to increase efficiency and reduce costs: this has been achieved to a great extent. Administration and planning have become more flexible and the port company is now considered a reliable partner when smart transport solutions have to be found. Another strong advantage is that the ports' customers only have to negotiate with one party.

A more recent organizational trend in the Swedish port industry is regional co-operation between port companies.

Port development

Ports and terminals continue to be an important part of the ongoing transport policy debate in Sweden. 2005 has been a year of waiting for the government to present a transport policy bill to Parliament.

Swedish ports hope the transport policy bill will be there in 2006. The bill should take into account the proposals from the "Cargo Transport Delegation", appointed by the government and consisting of representatives from the whole transport sector. It advocates that the state takes a greater responsibility for the infrastructure in some strategic nodes and that clear and transparent criteria are found to prioritize the public financing. The national administrations for rail and road have started this work. An important proposal of the Cargo Transport Delegation is also that the planning and financing of maritime infrastructure should be more integrated in the overall state infrastructure process. Up to now the port infrastructure has mainly been the responsibility of local governments in the cities.

Legislative and administrative developments

Another proposal of the Cargo Transport Delegation is to halve the fareway dues as maritime transport pays more for its infrastructure than the other modes.

Sweden has taken an active part in the creation of Motorways of the Baltic Sea, which during 2005 has been granted EU financing from the Transport European Network budget. The aim is to facilitate the internal cohesion of the Baltic Sea region, to improve its maritime access to the central regions of the Community and to reduce the high transport cost for serving the Baltic area.

The first step is to create a Master Plan which will provide a basis for further and more detailed planning. The project consists of four sub projects: a study on goods flows and maritime infrastructure; a Baltic Sea winter Motorways; safe major routes on the Motorways of the Baltic Sea and the development of a North Sea Baltic hub. The Motorways of the Baltic Sea is a long-term joint task for the Baltic Sea countries. It is coordinated by the Swedish National Maritime Administration and supported by the whole Swedish transport sector.

Fact File: Sweden

Number of ports	103						
Ports over 1 million Tonnes	28	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		167.0	89.6%	8.6	38.1	56.8	27.5
% change p.a.		4%	0.5%	12.0%	6.5%	2.1%	2.3%

Source: Eurostat, Unit G5 - Transport Statistics database

UNITED KINGDOM

Representatives in ESPO:

General Assembly: P. Davey (Felixstowe), J. Dempster (UKMPG), M. Putman (BPA), D. Whitehead (BPA)

Executive Committee: J. Dempster, D. Whitehead

Technical Committees: Transport: A. Duffy, Marine: J. Dempster, Environment: R. Appleton, Statistics: A. Jeffrey

Presentation of the national port sector

The UK ports sector is the largest in the EU in terms of both tonnage and number of ports. Ports vary considerably in their type and function; some serve specialist local markets, others serve national markets while others exist to provide links to remoter parts of the UK. Traffic is therefore spread across a large number of locations, reflecting, by continental standards, relatively small hinterlands. Increases in port traffic since the mid 1990s have resulted from increased imports; exports have remained static during this period.

Port management

There are 3 port ownership types: private, trust and municipal. Although most ports are either trust or municipal, the privatised sector handles most tonnage, amounting to approximately 66%. Although there is a framework of national legislation laying down basic functions and duties, ports also rely for their powers on local legislation; these powers can be amended and expanded through Harbour Revision Orders.

Whatever their ownership, ports are strategically and financially independent and there is no systematic national funding support. While privatised ports will have shareholders and be profit driven, other ports will rely on successful commercial operation to fund future investment and development. The privatisation process largely took place in the early 1990s: the last privatisation was in 1995. Since then, the government has undertaken (in cooperation with the sector) a review of the trust port sector and issued corporate governance guidelines applicable to all ports, a review of the municipal sector is on the verge of completion and will introduce new corporate governance guidelines.

Port development

Container and RoRo traffic in particular showed strong growth in 2004. The top 30 ports in the UK continue to account for 91% of all UK traffic. There have been three major applications for new container capacity. A decision to allow the development of the London Gateway was taken, although this was dependent on funding of improved road connection developments by the developer. Similarly, a conditional consent dependent on new road and rail links was given for Bathside Bay (Felixstowe).

There were congestion problems at UK ports in later 2004 and during 2005 there have been discussions on better communication between various parts of the transport chain on improvements. However, the concentration of both Ro-Ro and container traffic in the south east of the UK is a continuing issue and the Port of Dover is planning to invest in a new out of port parking area to ensure better traffic flows.

The issues arising out of major port developments have led to a debate about whether the government should take a greater role in port planning and, possibly, devise a national strategy. This has been partly influenced by a strong lobby from some ports to encourage development of new container capacity outside



the south east through more active government involvement in port planning. The majority of the industry is very uneasy about any increased government involvement.

Legislative and administrative developments

The UK government announced that in 2006 there will be a review of national ports policy. Although largely driven by container capacity issues, the review will also cover current ownership structures and progress since the last review (Modern Ports) on marine safety, environmental and regional issues. Towards the end of 2005 the government published the results of a survey on port employment. This estimated that there were 74,000 people working in ports or on direct port related activities. The figures will also be used to carry out an estimate of port accident rates.

The government has announced that it intends to introduce a Marine Bill which will, among other things, introduce a scheme of marine spatial planning for UK waters and set up a new Marine Management Organisation.

Fact File: United Kingdom

Number of ports	121						
Ports over 1 million Tonnes	46	Total	SSS (%)	Container	RoRo	Liquid Bulk	Dry Bulk
Throughput 2004 (million Tonnes)		573.0	68.4%	56.5	93.0	267.7	113.6
% change p.a.		3%	-5.4%	9.8%	6.7%	2.7%	-0.1%

Source: Eurostat, Unit G5 - Transport Statistics database





Annex 3: Statistics

Table 1: Seaborne transport - gross weight of goods handled in all ports

unit: million Tons	Total			% inwards	
	2004	2001	% change	2004	2001
FR FRANCE*	na	318	na	na	73%
GB UNITED KINGDOM	573	566	1%	60%	58%
IT ITALY	485	445	9%	70%	72%
NL NETHERLANDS	441	406	9%	77%	78%
ES SPAIN	373	315	18%	72%	73%
DE GERMANY	272	246	10%	62%	64%
NO NORWAY	198	na	na	33%	na
BE BELGIUM	188	174	8%	58%	61%
SE SWEDEN	167	153	10%	54%	54%
GR GREECE	158	122	29%	59%	60%
FI FINLAND	101	96	5%	55%	53%
DK DENMARK	100	94	7%	54%	55%
PT PORTUGAL	59	56	5%	73%	78%
LV LATVIA	55	57	-4%	6%	4%
PL POLAND	52	46	13%	32%	32%
IE IRELAND	48	46	4%	73%	71%
EE ESTONIA	45	40	11%	9%	9%
RO ROMANIA	41	28	47%	55%	53%
LT LITHUANIA	26	21	23%	17%	17%
BG BULGARIA	23	20	15%	59%	59%
SI SLOVENIA	12	9	32%	73%	73%
CY CYPRUS	7	6	19%	82%	75%
IS ICELAND	5	5	9%	66%	63%
MT MALTA	3	na	na	87%	na
Total	3,438	2,946	17%	61%	63%

Data ranked by 2004 total

* no data available at the time of publication

Source: Eurostat, Unit G5 - Transport Statistics database

Table 2: Top 15 Ports in 2004 -in tonnes- on the Basis of Gross Weight of Goods Handled

		Ranking 2003		% change
1	Rotterdam NL	330,865	--	7.6%
2	Antwerpen BE	152,327	--	6.6%
3	Hamburg DE	99,529	--	6.4%
4	Marseille FR	90,810	--	-1.7%
5	Bergen NO	75,635	--	-1.0%
6	Le Havre FR	71,878	--	6.7%
7	Grimsby & Immingham GB	57,616	--	3.0%
8	Genova IT	55,837	11	18.9%
9	Tees & Hartlepool GB	53,819	--	0.0%
10	London GB	53,289	--	4.4%
11	Algeciras ES	52,637	--	9.1%
12	Amsterdam NL	49,909	15	22.5%
13	Trieste IT	46,906	14	12.8%
14	Dunkerque FR	46,445	--	1.5%
15	Bremen/Bremerhaven DE	45,370	--	6.8%

-- same ranking as previous year

Source: Eurostat, Unit G5 - Transport Statistics database/BE: own adaptation/DE: Statistics yearbook 2004-Statistisches Bundesamt Wiesbaden, Fachserie 8, Reihe 5, P.5/IT: Assoportj



Table 3: Container Cargo in European Ports (per Country) in 2004
(000s TEU full and empty, double counting excluded)

Country	Total TEU	Port EU Ranking	TEU
GERMANY	10,708	Hamburg (2)	7,004
		Bremen/Bremerhaven (4)	3,469
NETHERLANDS	8,354	Rotterdam (1)	8,242
UNITED KINGDOM	7,894	Felixstowe (6)	2,717
		Southampton (12)	1,435
		London (15)	966
		Medway (19)	672
		Liverpool (20)	601
ITALY	7,261	Gioia Tauro (5)	3,261
		Genova (11)	1,629
		La Spezia (17)	1,040
SPAIN	7,178	Valencia (8)	2,129
		Barcelona (9)	2,084
		Las Palmas, Gran Canaria (13)	1,111
		Algeciras (14)	970
BELGIUM	6,528	Antwerp (3)	6,064
FRANCE	3,584	Le Havre (7)	2,158
		Marseille (16)	920
GREECE	1,866	Piraeus (10)	1,551
FINLAND	1,280		
SWEDEN	1,031	Goteborg (18)	736
IRELAND	925		
PORTUGAL	907		
DENMARK	524		
NORWAY	502		
CYPRUS	305		
POLAND	195		
LITHUANIA	174		
ESTONIA	160		
BULGARIA	158		
SLOVENIA	152		
MALTA	103		
LATVIA	91		
total	59,881		48,759

* TEUs = Twenty-foot Equivalent Unit (unit of volume equivalent to a 20 foot ISO container)

Source: Eurostat, Unit G5 - Transport Statistics database/Belgium, Cyprus, Ireland, Italy and Goteborg own adaptation

Table 4: RORO traffic in European ports 2004 (per country)

Country	Passengers Journeys (millions)	Freight (million tonnes)
BE BELGIUM	0.7	23.1
BG BULGARIA	0.0	0.5
CY CYPRUS	0.4	0.2
DK DENMARK	48.6	22.8
EE ESTONIA	6.7	3.1
FI FINLAND	16.8	12.7
FR FRANCE	27.1	23.8
DE GERMANY	29.8	31.6
GR GREECE	96.4	28.9
IE IRELAND	3.6	10.6
IT ITALY	83.3	50.9
LV LATVIA	0.1	1.0
LT LITHUANIA	0.1	1.6
MT MALTA	0.2	0.2
NL NETHERLANDS	2.0	16.2
NO NORWAY	5.8	5.9
PL POLAND	2.0	3.3
PT PORTUGAL	0.6	0.4
SI SLOVENIA	0.0	0.0
ES SPAIN*	20.9	18.9
SE SWEDEN	33.3	38.1
GB UNITED KINGDOM	32.8	93.0
TOTAL	411.3	386.8

* Spain data only for the major ports

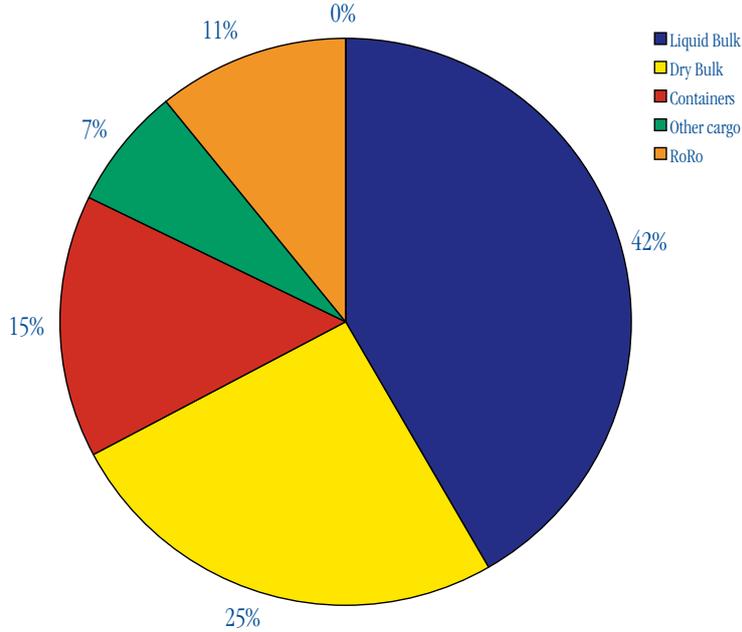
Source: Eurostat, Unit G5 - Transport Statistics database/Cyprus Ports Authority/Statistics yearbook 2004-Statistisches Bundesamt Wiesbaden, Fachserie 8, Reihe 5, p21/Ireland Central Statistics Office

Table 5 : Liquid and Dry Bulk Cargo per Country, 2004

	Liquid		Dry	
	million tonnes	% PA.	million tonnes	% PA.
BG BULGARIA	8.5	14.1%	9.9	7.3%
CY CYPRUS	2.4	-20.2%	1.3	-32.0%
DK DENMARK	30.4	1.7%	28.1	-1.1%
EE ESTONIA	29.4	6.1%	6.3	-6.7%
FI FINLAND	25.5	-16.1%	30.9	12.7%
FR FRANCE	172.3	0.8%	80.9	-4.3%
DE GERMANY	69.0	9.4%	59.2	-5.1%
GR GREECE	42.3	-0.6%	37.3	2.5%
IE IRELAND	13.3	2.7%	14.8	-1.3%
IT ITALY	226.9	-2.9%	90.5	3.2%
LV LATVIA	22.4	-8.9%	19.7	4.4%
LT LITHUANIA	14.8	-16.5%	6.2	27.4%
MT MALTA	1.1	12.1%	0.8	-16.1%
NL NETHERLANDS	189.8	8.0%	145.5	5.2%
NO NORWAY	105.1	3.2%	50.2	23.6%
PL POLAND	14.1	14.9%	23.9	-1.4%
PT PORTUGAL	27.5	3.1%	17.1	2.8%
SI SLOVENIA	2.2	13.4%	7.3	16.3%
ES SPAIN	134.5	3.5%	102.5	4.6%
SE SWEDEN	56.8	2.1%	27.5	2.3%
GB UNITED KINGDOM	267.7	2.7%	113.6	-0.1%
TOTAL	1,456.0	2.5%	873.5	7.0%

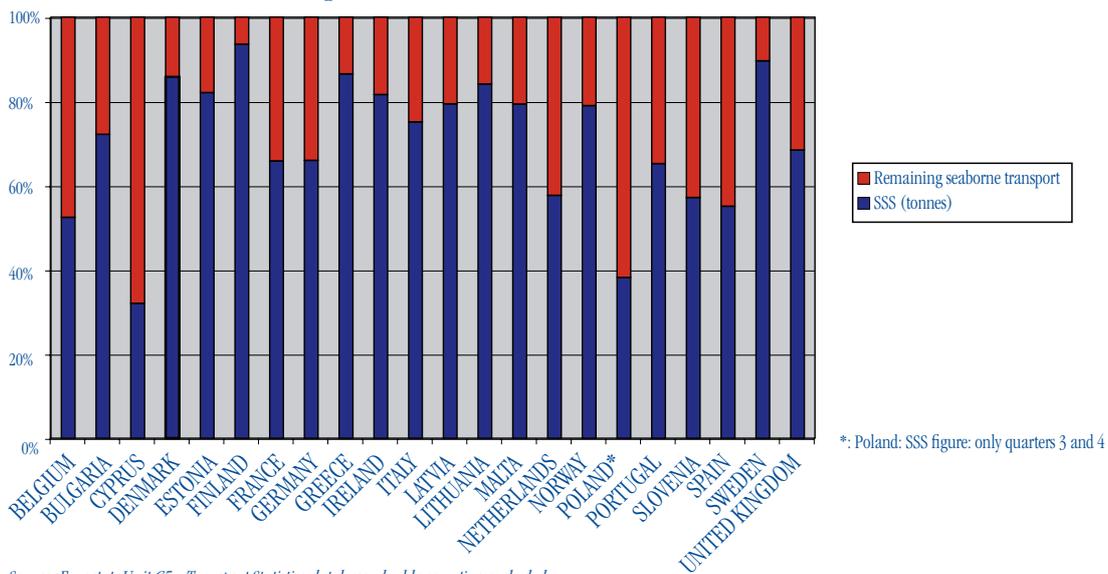
Source: Eurostat, Unit G5 - Transport Statistics database/Cyprus Ports Authority/Statistics yearbook 2004-Statistisches Bundesamt Wiesbaden, Fachserie 8, Reihe 5, p. 21/Finnish Maritime Administration

Figure 1:
EU Port Throughput by Cargo Type in 2004



Source: Eurostat, Unit G5 - Transport Statistics database

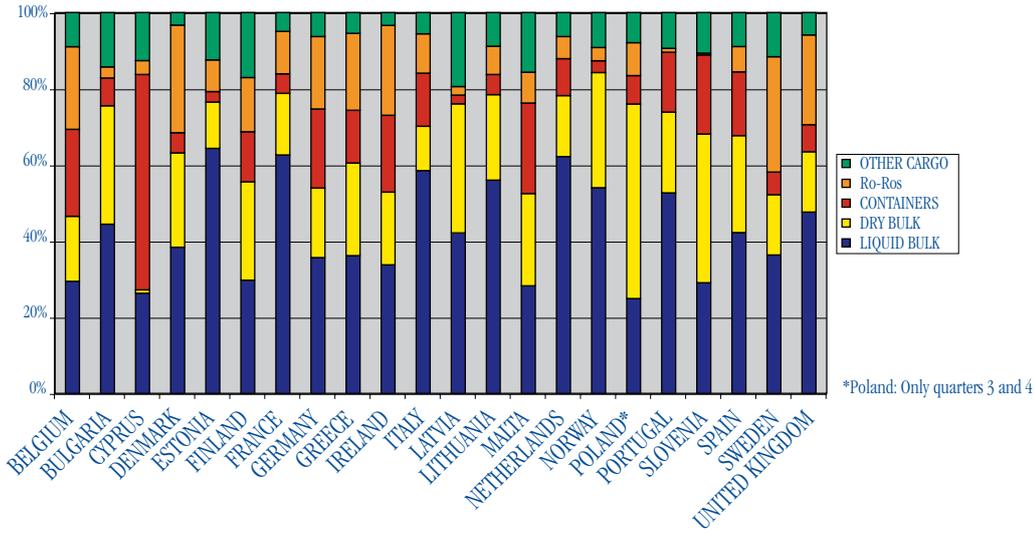
Figure 2:
Share of Short Sea Shipping (SSS) in the total Seaborne Transport of Goods in 2004 (Main ports)



Source: Eurostat, Unit G5 - Transport Statistics database, double counting excluded

*: Poland: SSS figure: only quarters 3 and 4

Figure 3:
Seaborne Transport of Goods by Type of Cargo in Short Sea Shipping
in 2004 in the Main Ports



Source: Eurostat, Unit G5 - Transport Statistics database, double counting excluded







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