

EFIP Annual Report 1998•1999

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*A look at the activities
of the inland ports in Europe*

The European Federation of Inland Ports (EFIP) was created in Brussels in 1994. Today it counts some 200 inland ports in 18 countries in Europe. EFIP intervenes with respect to the European insititutions

- *to uphold and promote the role of inland ports in multi-modal chains;*
- *to highlight their essential character in the economy as centres of attraction for industrial, commercial and logistical activities;*
- *to understrike their role as actors in national and regional development.*

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Foreword

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EFIP was created in 1994 to highlight that inland ports had to be taken into account when developing a common European transport policy. It is with great pleasure that I note that the cooperation between EFIP and the EU institutions has been considerably enhanced since then. Inland ports play an important role as multi-modal interconnection points in the European hinterland and their essential function in the transport chain is increasingly acknowledged. Several studies have shown their considerable impact on the regional and national economy as centres for industrial and logistical activities.

The trans-European networks (TEN) are a very important field of activity to optimise the conditions for a smooth supply chain management throughout Europe, upgrading infrastructure and removing bottlenecks. The priorities in the framework of TEN and its financing should not only be seen as a political opportunity, but as how limited resources can be exploited in a cost-effective and creative way. As dynamic interfaces for the collection and distribution of goods, inland ports form indeniably part of the network.

Efficient and competitive transport systems are essential for economic prosperity in Europe. They moreover help to reinforce social and regional cohesion. New technologies need in this frame to be promoted in order to rationalise further transport services. From a legal point of view competition rules have to be safeguarded enabling an optimal integration of transport economic activities and boosting efficiency. Last but not least, the quality of life of the European citizens must be guaranteed by a special focus on environmental friendly alternatives.

The EU common transport policy is at the core of inland ports' attention and activities. EFIP looks forward to continuing a constructive dialogue and to build with all parties involved on a competitive Europe based on sustainable mobility.

EFIP
July 1999

Klaus van Lith
EFIP President

Transport policy in 1998-1999

1. Trans-European networks

The Commission issued end 1997 a proposal to complement the TEN-guidelines with seaports, inland ports and multi-modal terminals. All inland ports equipped with combined traffic facilities were incorporated in the proposal. By doing so, the Commission went beyond the actual intention to add seaports and underlined the need for an integrated approach on interconnection points in the network. The European Parliament fully supported this view of the Commission and went even further. Apart from the ports with combined traffic terminals, ports with important bulk and general cargo trades are also involved in multi-modal cross-border flows. The Parliament called upon the Commission and the Council to take account also of these ports in the future TEN-guidelines because of their European dimension. The EU transport ministers endorsed the Parliament's views and will hopefully adopt soon a common position including inland ports. EFIP welcomes this very positive signal given by national governments to support inland ports in their future development.

2. Enlargement

Apart from the screenings in the field of transport EFIP closely followed the TINA-process, the transport infrastructure needs assessment in the applicant countries. Our federation particularly welcomed the initiative of the Economic and Social Committee to actively involve the industry in the activities, since it is crucial that the network corresponds to the needs of the direct users. EFIP is hopeful that the analysis on links such as road and rail corridors will be completed with the multi-modal potential of the overall network by adding systematically the interfaces combining road, rail and waterborne transport. EFIP provided data on inland ports and called upon the policy-makers to create a multi-modal network instead of modal ones in order to meet the goal of efficiency and sustainable mobility. It counts upon the pre-accession instruments Phare and ISPA to translate this objective into

concrete actions.

2. Combined traffic

EFIP continued to draw attention to inland ports' capacity and the added-value they represent as inter-modal nodes for a positive development of combined transport in all its techniques. They respond to the growth of unitised freight by paying continuous efforts to modernise transshipment facilities and ancillary services. An increased number of inland ports is equipped with one or more combined traffic terminals, creating an excellent environment for tri-modal transport operations in the European hinterland.

EFIP therefore welcomes the decision of the transport ministers to prolong the financial assistance until 2001 to the PACT-programme. PACT proved to be a very useful instrument to encourage valuable innovative operations which start off very well thanks to some initial financial support. EFIP hopes that the use of combined traffic will be further enhanced through an agreement on tax rebates and the exemption of certain driving restrictions for heavy goods vehicles.

The mentioned measures are very helpful instruments, but of course more needs to be done. Another priority is for example the harmonisation of loading units and different technical regulations depending upon modes. Furthermore, the current scope of combined traffic is still too much restricted to rail-road. Combined traffic must in fact allow the most efficient transport mix according to a particular situation. The waterborne sector (inland shipping, sea-river and short-sea) as a very reliable and environment friendly mode must be fully included in every initiative related to combined traffic.

4. Inland navigation

EFIP very much looks forward to the initiative of establishing a European promotion agency for the sector joining efforts of national and regional promotion bodies to underpin its

economic and environmental advantages at European level. Other positive news is the planned web site on inland shipping on the EU homepage EUROPA, which will bring extensive information on the Community fleet and its operators, the waterway network and legislation. EFIP especially appreciates that it will highlight the modern role of the sector within the context of the entire transport chain. It is another tool to strengthen the position of inland shipping in Europe.

5. Short-sea shipping

EFIP also attaches great importance to the developments in the field of short-sea shipping. EFIP is represented in the short-sea panel of the Maritime Industries Forum to represent the inland ports with sea-river activities. The Panel decided in 1998 to enhance its activities on the commercial front thereby relying on more co-operation with shippers. The workshop organised in Bilbao in February of this year examined by specific case presentations innovative approaches for the promotion on short-sea. Studies have shown that the actual share of short-sea in transport is much more significant than estimated so far. It is however felt that still political action is necessary to remove certain barriers. The MIF Plenary issued a recommendation underlining the need for a more level playing field between transport modes.

There is good news from the Dutch authorities with regard to transit procedures for sea-river vessels passing seaports. After several complaints from the operators involved in the Germany-UK trades about the transit requirements in the Dutch seaports, the transport ministry in The Hague finally decided to start shortly with an experiment for a simplified procedure for inward and outward clearance obligations. If the outcome is a

success, the new practice will be applied to all trades. EFIP is hopeful that this example will be followed.

6. Railway policy

The railways are together with road transport and inland shipping an important ally of inland ports for offering smooth transport services in an increasing inter-modal environment. As a lot of inland ports are directly served by the public railway network, by private railway undertakings or are even owners themselves, they very much look forward to a real opening of the sector. Extended access to the public network will encourage newcomers to enter the market. Innovative solutions and a growing interconnectivity up to terminal level in ports will enhance seamless flows and increase opportunities for successful partnerships between transport operators. EFIP looks forward to intensifying its cooperation with the railways.

7. Fair and efficient pricing

Much attention was given last year to the internalisation of infrastructure and external costs. The European Commission and the Parliament have high hopes that the principle based on the marginal social cost pricing will encourage a more sustainable transport system and provide incentives for appropriate investment in transport infrastructure. EFIP subscribes to the user pays-principle, but does not think it will be the magic solution to solve all current problems. Various transport experts forecast that effects of charging on a modal split will be rather low. Nevertheless, EFIP can agree that the transport user should bear the non-internalised costs he imposes on society. An important condition is however that the application does not lead to new distortions of competition which favour one mode vis-à-vis another.

Priorities for the future

1. An integrated pan-European transport system

EFIP wishes to stress the importance of an overall vision on the pan-European transport network. This will be crucial to enhance seamless trade flows in an enlarged Europe. New trends in logistics have to be taken duly into account supposing an efficient interlinkage of modal infrastructure. Developments have to be market-driven in the first place. The current focus on corridors and routes in transport policy must be completed with attention for the supporting role of interconnection points such as inland ports where modes come together. By exploiting economies of scales with barge and train shuttles, multi-modal terminals can contribute to a transfer of a significant part of the collection and distribution function inland away from the major seaports. As such, the economic supply and demand of big agglomerations in the hinterland can be valued through multi-modal inland hubs enhancing a better use of available infrastructure.

The financial means to reach the goals of an operative TEN are limited. This increases the importance of interconnecting optimally the national networks and to avoid wasting of valuable resources. As the Commission proposal for a revision of the TEN-guidelines is said to concentrate on the integration of the network and a more efficient use of available infrastructure, EFIP hopes that purposeful attention will be given to interoperability and technical standards for the transition between modes.

2. Intelligent transport services

There is absolutely no doubt that modern information and communication technology will increasingly rationalise existing transport operations. Inland ports are very hopeful that concrete actions will follow by the EU institutions to support this evolution. A lot is already happening in the area of modal oriented traffic management and navigation systems. As the most pertinent conclusion from the latest TEN-implementation report by the European Commission is the need to

integrate the modal networks into a seamless system, also the information systems need to be integrated at the nodal points to avoid ruptures of flows. Inland ports are very concerned about this matter, because there are already several isolated solutions as a result of local initiatives that are unfortunately not compatible. Interoperability and a standardisation of systems covering the overall transport chain are required for the sake of efficiency. EFIP believes that the TEN-budget must allocate a fair part of funding in this area.

3. European Data System

EFIP considers the establishment of a comprehensive European wide data system of utmost importance. Reliable data and scientific prognoses in all transport fields are crucial to underpin and to guide the common transport policy. Several initiatives related to statistics and information gathering have been taken in some fields. EFIP however feels that more should be done to come to a systematic and coordinated approach enabling a global understanding of the transport system and its future trends in a pan-European context. An example could be to integrate the geographic information systems of TEN and TINA and to enlarge the scope. EFIP is committed to provide on a regular basis data related to inland ports covering traffic, infrastructure, services, employment etc.

4. State aids

EFIP looks forward to the revision of regulation 1107/70 covering all land modes and hopes that the new state aid regime will be clear in terms, leading to more transparency. Following the example of the guidelines in the field of air and sea transport, it should be stated that infrastructure investments are not to be considered as State aids if there is free and equal access to the infrastructure for all interested operators. As interfaces between road, rail and shipping, inland ports also advocate a more level playing field between the modes to avoid distortion of competition. A balanced development of multi-modal and combined traffic requires a neutral and discrimination-free access to state aids in

order to allow all efficient combinations without favouring a particular mode.

5. Safety and environment

Inland ports occupy a strategic geographic location near the centre of European cities. They possess a valuable resource for the economic life of the urban regions in terms of accessibility, industrial activities and employment. They are also very conscious of what is at stake with regard to mobility, regional planning and environment. Therefore, inland ports work closely together with national authorities for ensuring safety rules optimising further development rules their role in regional and local planning. The European Commission scheduled an extensive package of initiatives with regard to safety and environment. EFIP will be happy to cooperate also with the EU to continue raising standards and to guarantee quality of life for the European citizens.

6. Seaport policy

EFIP counts among its members inland ports which are also de facto and/or de iure seaports. There are sea-river ports in Belgium, Denmark, Finland, France, Germany, Portugal and Sweden which are accessible to sea-going vessels. They are situated deeper into the hinterland along navigable rivers, canals or lakes. Although they respect all rules with regard to seaports and contribute to the shift «from road to sea», they tend to be often

forgotten in EU policy. EFIP insists on their recognition as seaports.

In follow-up to the green paper on seaports, the European Commission prepares proposals on the liberalisation of port services. The inland ports subscribe to the principle of open markets laid down in the treaty. With respect of safety standards, free access must be ensured and abuse of dominant positions should be outlawed in the port sector. The treaty offers a clear set of rules defining the freedoms and the competition provisions for examining each case in detail. Therefore, EFIP sees no immediate need for a specific regulatory framework to enforce an open port market.

7. External relations

EFIP hopes that the technical talks between the EU and Russia will progress on the opening of the Russian inland waterway network and that formal negotiations can start soon. Although negotiations might reveal very difficult, inland ports ask the EU institutions to exercise pressure on Russia to open its market and to accept reciprocity in relations. The potential for European sea-river shipping and trade opportunities on the extensive Russian waterway network is enormous.

New actions

1. EFIP Masterplan

A new updated version of the Masterplan will come out. In 1997, the «Masterplan - Multimodal freight centres in Inland Ports» was launched to take stock of the latest developments in the inland ports' sector. Whereas inland ports were always involved in the transshipment and storage of bulk cargo, they now also increasingly handle general cargo and unitised goods. All ports with at least one terminal for combined transport were outlined on a map covering the European Union and central and eastern Europe.

The new version will incorporate all inland ports, which fulfil the criteria. This Masterplan has been addressed Visualising a network of multi-modal interconnection points across the European hinterland, it will be a tool for the industry active in the transport sector and to political decision-makers.

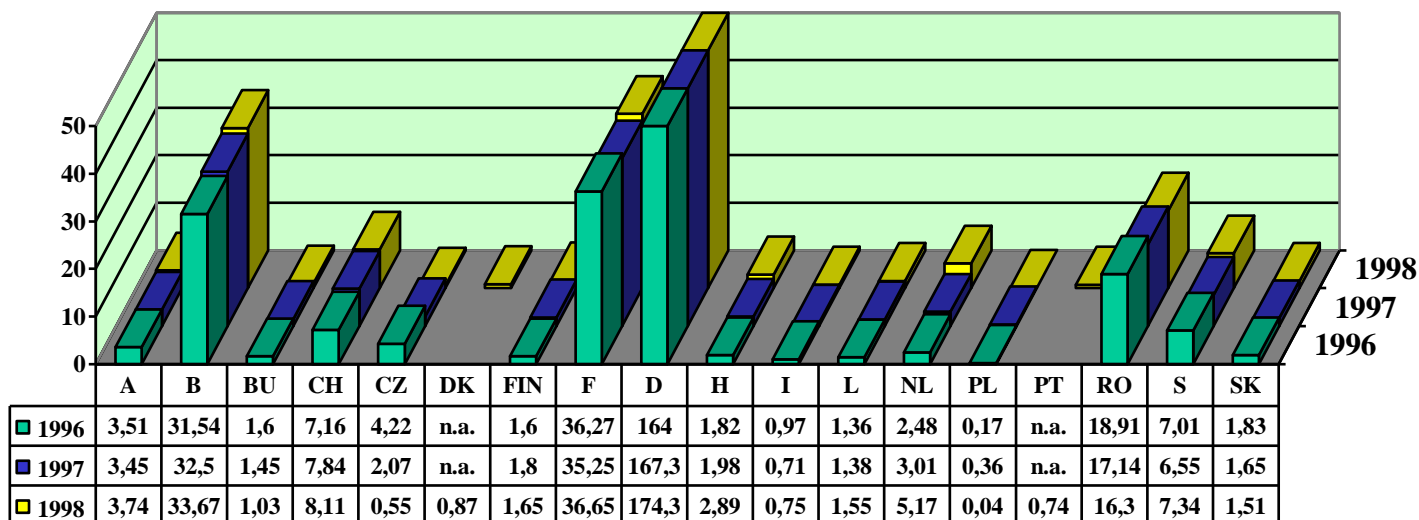
2. Fact-finding

While inland ports follow the new trends and develop with their partners service packages for high value goods such as cars, containers, swap-bodies or palletised dangerous goods, they did not wait to implement also innovative concepts for bulk cargo, their traditional core market. Transshipment and storage facilities are modernised to ensure cost reduction and high quality. With the possibility of an optimal mix between road, rail or inland shipping, inland ports create an alternative to the traditional unimodal solutions for a wide range of products.

A new action was initiated this year to gather all user relevant information on the inland ports' sector. Together with user-friendly maps, EFIP will present these data including a description of each port. A next step will be a presentation of the all information related to European inland ports on on a web site.

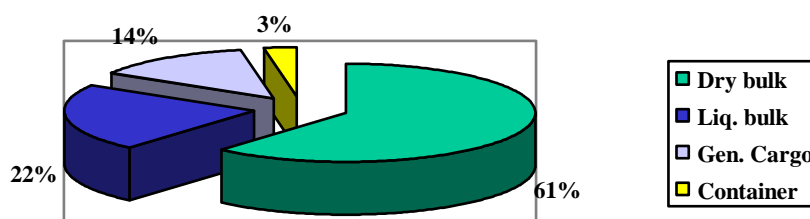
Facts & figures

Total waterborne transshipment in EFIP ports per country in the period 1996-98 in million tonnes



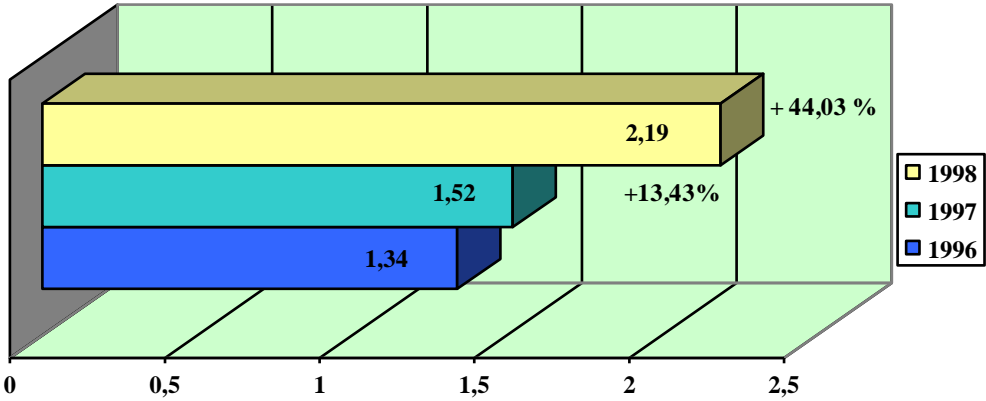
	Total	Growth
1996	280,9	
1997	284,5	+ 1,28 %
1998	296,9	+ 4,36 %

Overview of transhipped waterborne freight in 1998

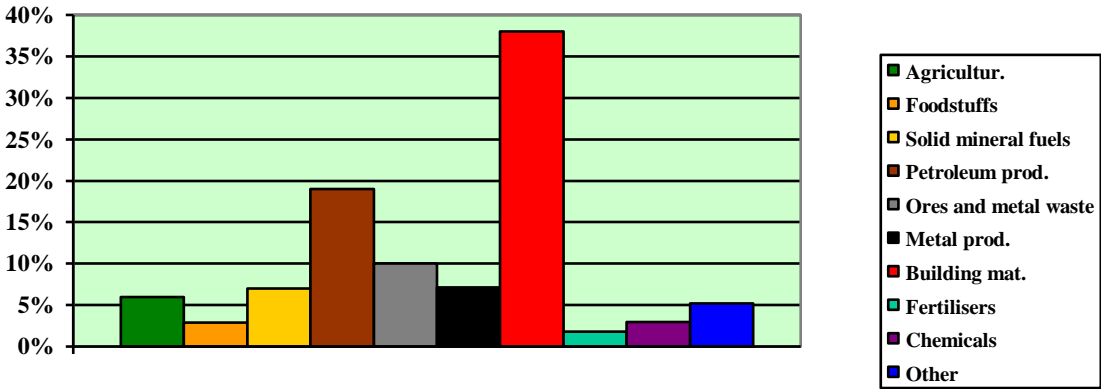


Growth of waterborne container transhipment in EFIP ports in million TEU

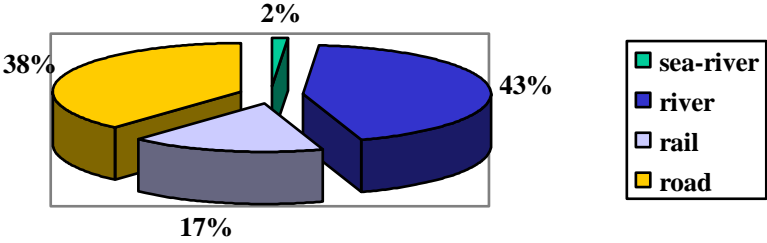
The box takes each year a leap. The figures in the graphics are only based upon data from container terminals in France, Germany, Holland, Sweden and Switzerland. The total figure on transhipment of containers in inland ports in 1998 amounts to at least 4 million TEU.



Overview of transhipped NST-R categories in waterborne transport in 1998



Average modal split in inland ports in 1998



EFIP members

EFIP membership covers some 200 inland ports along the waterways in the European Union and central and eastern Europe. EFIP started in 1994 with 10 member countries. Meanwhile, the federation keeps growing. Its objective is to represent all inland ports in Europe to defend the interests of the sector at best. In 1998, NV Zeekanaal in Belgium and the ports of Varna and Rousse in Bulgaria joined. This year, EFIP welcomes the inland ports along the Douro river in Portugal and the sea-river port of Randers in Denmark. At present, 18 countries are represented within the federation.

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