



**A look
at the
activities
of the
inland ports
in Europe
2001 & 2002**



EFIP

Annual Report
2001 & 2002



200 inland ports
in 19 countries
in Europe

FOR FURTHER INFORMATION, PLEASE CONTACT:

EFIP

Mr. Jürgen Sturm
Place des Armateurs 6 • B - 1000 Bruxelles
Phone: +32 2 420 70 37
Fax: +32 2 420 03 71
E-mail: efip@skynet.be
www.inlandports.org



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European Transport Policy has come to a turning point. The White Paper on Transport Policy to 2010, which the European Commission adopted in September 2001, speaks a vivid language as for the future challenges in the field of transport. This White Paper is a necessary publication that came at the right time. It has to be read in the context of the decision of the Gothenburg Summit of EU Heads of

Governments to put sustainable development at the core of European policy. Sustainable development is a conception that will have a deep impact on all economic activity we have become used to during the post-war period. This period was characterised by the creation of unprecedented wealth in Western Europe. The recognition, however, that such wealth was connected to high environmental and social costs only gained slowly access into politics in Europe. Still, the need to take into account the impact of economic growth to environment and society has become irreversible. We may use the words of Fritjof Capra, that a “change of paradigm” has widely taken place in our societies and that business will be deeply affected by such change.

What does this reality mean for European transport policy and more precise for the role European inland ports play in this policy area? First of all it may be stated that a further concentration to road as number one mode of transport will result in more negative impacts on the environment and society. Nobody will question the important role road transport will continue to play also in sophisticated logistic chains. The time of single transport by road from point A to point B, however, is outdated. The unquestioned negative impacts of road that consist mainly of pollution, congestion, accidents and noise tend to prevent this mode from increasing its market share when sustainable development is at stake.

The solution that has to be found must inevitably be developed around integrative and intermodal concepts. Only the integration of the different modes of transport, a network approach to link road, rail, inland waterway and short-sea-shipping will allow for an environment where every mode can perform best with regard to its economic importance and its impact on environment and society. It is therefore a precondition to create a level playing field for all modes and to internalise the external costs that are caused by the respective mode into the market price for transport services.

Inland ports are natural points to interconnect the different modes and consequently their contribution is crucial for the development of intermodal transport structures.

However, inland ports face challenges. They do not operate in a closed surrounding, but are an integral part of the community and region they are located in. European inland ports are accepting this challenge and focus actively on their socio-economic role aimed at the mutual benefit of ports, cities and regions in Europe.

Against this background I am offering the further co-operation and contribution of the network of more than 200 inland ports in currently 19 European countries in order to implement the conclusions of the Gothenburg Summit and to achieve sustainable development in the transport sector for the benefit of our common continent.

Charles Huygens
EFIP President



T R A N S P O R T P O L I C Y

“Linking up the Modes” was the headline of one chapter in the Commission’s White Paper on Transport Policy until 2010. Linking up the modes is an ambitious concept since it will require the existence of comparable frameworks in which the different modes of transport can operate and can compete. Therefore, the most important aim to achieve will be to put and end to the notion that efforts to create a level playing field for all modes of transport will result in distortion of competition.

The contrary is the case. If common transport policy on European level fails to achieve comparable framework conditions for all modes, competition between the modes will be impossible and competition will only take place within the respective mode. Such framework conditions, however, can only be generated by political initiatives. It must be the aim of such initiatives to enable the different modes to become comparable with regard to their economic potential but also with regard to their environmental impact. This would mean, for instance, that if the use of particular infrastructure is charged for one mode such framework should exist for all modes.

Moreover, it is a political prerogative to influence supply and demand with regard to social and environmental necessities. Therefore, any political initiative should not be judged if it is capable to influence competition but if such influence is justified with regard to higher priorities. It is almost inevitable that political initiatives on European or national scale have a certain impact on existing markets - but the answer to such impact cannot be to reject such initiatives per se, but to accomplish a balance of interests.

MARCO POLO

In February 2002 the European Commission adopted a proposal for a regulation on the granting of financial assistance to improve the environmental performance of the freight transport system - better known as the Marco Polo Program.

Marco Polo is an example for an answer to the need for political action mentioned above. It foresees the granting of aid to modal shift actions, to catalyst actions and to common learning actions. There is no doubt that such aid scheme that is designed to foster modal shift away from road to environmentally and socially more friendly modes of transport has a considerable impact on today’s realities in the transport market. Marco Polo will almost

certainly contribute to a framework where transport solutions based on environmentally friendly modes enjoy certain benefits compared to those solutions based on the use of road transport. This, however, is no distortion of the transport market but a justified intervention in order to achieve a contribution to sustainable mobility.

EFIP fully supports the concept of Marco Polo the way it has been proposed by the European Commission. It is remarkable that aid for modal shift actions shall be given as an environmental premium and shall depend highly on the external costs saved by a particular modal shift away from road. Such a savings award is an ambitious goal to achieve since it requires reliable calculations as



for the external costs saved. Nevertheless, this concept merits full support because it is designed to take into account the difference in environmental and social costs between the modes.

Moreover, a project related calculation of external costs might also serve as a prerequisite for a more holistic approach to calculate the external effects on environment and society caused by the different transport modes.

One further aspect of the Marco Polo program should not be underestimated. The proposed

common learning actions are of high importance. Marco Polo can become a framework for the exchange of scientifically funded and practically experienced best practices in intermodal and environmentally friendly transport. It is important to recognise Marco Polo's capability to become the basis for an emerging network of exchange of experiences for people active in the sector.

Marco Polo is without doubt a very ambitious program combining "classical" project funding with new ways to define the amount to be allocated to the respective project, as well as offering a framework for the necessity to learn and to deepen the knowledge on intermodal transport.

EFIP has deliberately not put forward any proposals for amendments to Marco Polo in the European Parliament. EFIP considers a one-to-one implementation of Marco Polo as adopted by the Commission as crucial. Therefore EFIP rejected fundamentally any notion to reduce the budget for Marco Polo from the initially foreseen € 115 Million until 2007.



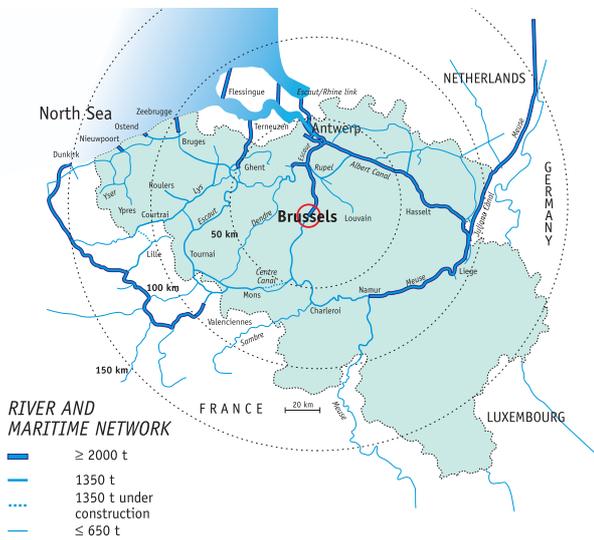
Place Leroux de Fauquemont - BP 1394 R.P.
59015 LILLE CEDEX - FRANCE
Tél. (33) 03 20 22 73 80 Fax. (33) 03 20 22 81 67
e-mail: contact@afpi.org
Internet: www.afpi.org

In 1994, the main French inland ports have created the French Association of Inland Ports (FAIP). The aim of this association is to underline the huge contribution of inland ports in the economic development.

Its members are also acting for multimodality by creating and managing terminals where the transfers can be done between waterways, railways and road transport.

The French inland ports: partners for logistics services, supports for durable development, boosters for intermodality!

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Just 5 hours sailing from Antwerp (with only two locks to be negotiated from the sea), the port of Brussels offers exceptional accessibility for river and sea traffic up to 4,500 tons. Its geographical location is additionally privileged as the port estate is located at the centre of a dense motorway and railway network.

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An important economic centre: more than 250

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Assets that make Brussels an outstanding logistical platform at the centre of the European networks.



Port de Bruxelles Haven van Brussel

Place des Armateurs, 6 B- 1000 Brussels
Tel. : + 32 2 420 67 00 - Fax. : + 32 2 420 69 74
Email : portdebruxelles@port.irisnet.be
Site web : <http://www.portdebruxelles.irisnet.be>



2

TRANS-EUROPEAN TRANSPORT NETWORKS (TEN-T)

With regard to the development of the TEN-T the year 2001 was characterised by a proposal to amend the Community guidelines of TEN-T. The European Commission presented this proposal in September 2001 and it is currently on the agenda of the European Council of Ministers. The proposal was put forward in order to prepare for the larger TEN-T revision, which is scheduled for 2004. The Commission recognised that delays in the completion of many priority projects under TEN-T is putting at risk its full completion by 2010. Such delays mainly result from national responsibility for the implementation of the projects. Many Member States have put preference to national projects, even when these projects are co-funded by TEN-T. Severe delays therefore exist at cross border projects. The Commission therefore added a number of cross border projects to the list of priority issues and also proposed to increase its financial contribution for certain cross-border projects to 20%. Most of the projects proposed deserve high attention, especially the improvements on the Danube between Straubing and Vilshofen and the rail links towards Eastern Europe. The European Parliament has not added any other projects to the list and it is now the responsibility of Member States to start with a rapid implementation especially with regard to enlargement.

There is still a modal approach within TEN-T and intermodal structures are not at the core of the framework. This is regrettable since the TEN-T could function as a very useful tool in



order to combine the different modes of transport. Such combination should be at the centre of the 2004 TEN revision. With regard to the likely fact that the next TEN revision will take place in an enlarged European Union the issue of combined transport should be dealt with carefully if a further increase of road transport in the new Member States shall be avoided. Consequently, inland ports should not only be recognised as part of the network but as trimodal terminals in intermodal transport structures.

As a result of the special attention the Commission attributes to Short-Sea-Shipping (SSS), it proposed the creation of so-called Motorways of the Seas. Such institutionalised SSS connections may very well contribute to enhance the importance of this mode. Therefore EFIP is basically in accordance with that proposal, shares, however, certain concerns with regard to distortion of competition. From the point of view of European inland ports it will be important to integrate inland ports into this concept, where such integration is geographically possible. Motorways of the Seas are not only accessible at the seashore but already in the hinterland. The integration of the hinterland via inland ports is crucial for the connection of regional clusters via SSS.

EFIP regrets the shortcomings of the implementation of TEN-T projects. Especially with regard to enlargement of the Union it is crucial that Member States' infrastructural conceptions do not stop at the respective borders. Moreover, the intermodal dimension of transport must be put to the centre of TEN-T.

3

PRICING AND CHARGING

Today's reality of transport in Europe is characterised by the inexistence of comparable frameworks that govern the different modes. European transport policy is currently far from offering a level playing field for road, rail, inland waterway and short sea shipping. It has to be observed that under current conditions the transport of goods by road is in most cases the cheapest option. Thus, these conditions impede modal shift and more sustainable development in the transport sector.

It appears undisputed that in comparison to other modes road transport causes a considerably higher negative environmental and social impact. Congested roads, accidents, pollution and noise are the consequences of such framework. Such negative consequences do have an economic dimension that cannot be neglected. However, it is currently not the polluter who compensates society for such negative impacts, but it is society itself that bears the costs. Such external costs that arise from pollution, are not part of the market price of road transport. Therefore, it will be indispensable to create a

framework in order to internalise such external costs. This internalisation is certainly not limited to the road sector; every mode has to pay for the external costs that are respectively caused. Inland navigation and rail also have to be integrated in such pricing framework, but their external costs will be considerably lower than those of road.

Consequently, a functioning framework to internalise external costs into the market price of transport services will be the most important precondition that allows the different modes to perform best. The thematic connection of internalisation of external costs and the achievement of the White Paper's aim to link up the modes is obvious. Intermodality can only function within an environment that requires full cost pricing for every mode involved.

However, it will be difficult to achieve the implementation of such framework. Although the European Commission is busy on this matter and intends to put forward a framework directive on this issue, difficulties will remain. Besides methodology one large legal obstacle is the Mannheim Convention that guarantees that navigation on the Rhine is free. As a piece of international public law the Mannheim Convention currently impedes the implementation of a charging and pricing framework on the Rhine.

EFIP supports efforts to ensure a theoretical fundament and a practical implementation of the concept of internalising external costs of transport. It is necessary, however, to favour a holistic approach that covers all modes on a European scale.



4

RAILWAYS

The conditions under which European railways presently operate are one of the Commission's main focuses and play a central role in the White Paper. What the Commission calls "revitalisation of the railways" is an integral part to achieve the re-establishment of a balance between the various modes.

The Commission has mapped the path towards such revitalisation with the adoption of the so-called Second Railway Package, that follows the first such package that was focused on improvements to rail infrastructure. The Second Railway Package, that was adopted in February, now puts emphasis on the overcoming of technical shortcomings that result in obstacles for cross-border rail operations, mainly interoperability of systems and common safety standards.

With reference to infrastructure it has to be stated that the aim of the Commission to create a framework for the separation of service providers and infrastructure managers is unfortunately meeting stiff resistance in

a number of Member States. However, certain encouraging steps can be noted where such obstacles are overcome gradually.

From the point of view of European inland ports more and more ports become proactive in this field and take advantage of the separation of service and infrastructure where national legislation is offering an ade-



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quate framework. The foundation of railway companies by inland ports that allows them for an even better service for their customers is one of the most striking new developments of recent years. Smaller rail entities that are adapted to meet customers' demands better than large state dominated structures. Therefore many inland ports enter the railway markets to ensure customer satisfaction when integrated transport solutions are demanded.

With regard to the Second Railway Package it is a precondition to overcome the conservatism

and protectionism that is rooted in national policy of by-gone centuries. In a European common market for transport services rail can only reach its full potential if it can offer integrated cross-border services. The requirements thereto are interoperable technical applications and common safety standards and the establishment of a European railway area.

In connection with new rail infrastructure it is high time to re-install the "Iron Rhine" as a performing alternative between the Ruhr Area in Germany and the Port of Antwerp.

EFIP puts high expectations into the Railway Packages proposed by the European Commission. They are an adequate tool to achieve liberalisation of the European railway market. It is Member States' responsibility to give up their reluctance to implement these proposals. National Governments should not yield to the pressure from their well-established rail companies but provide for a framework that allows for more competition in this sector.

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2, quai de Grenelle 75732 Paris Cedex 15
Tél : 01.40.58.29.99 Fax : 01.45.78.08.57
e-mail : pap@paris-ports.fr web :
www.paris-ports.fr

5 SHORT SEA SHIPPING

Short Sea Shipping (SSS) appears to be the mode that enjoyed most political attention during last year. Such attention tends to be basically justified, since SSS is a mode that still has considerable potential for growth. With regard thereto, the creation of national promotion offices for SSS was a very useful decision and their success to shift cargo to SSS is remarkable.

Nevertheless, SSS is still facing severe obstacles that prevent it from exploiting its full potential. The most important ones are related to bottlenecks due to customs procedures. Within the current European customary framework it is very difficult to have a fair competition between SSS and especially road transport. A lorry that is delivering freight from one Member State to the other without leaving the territory of the European Union is

exempt from any customary procedure - there are free roads between Lisbon and Helsinki. Transport via SSS, however, generally has to undergo customs in the port of departure and in the port of arrival. Additional costs that arise from such obligations are obviously putting SSS into a defensive position. Also with regard to this aspect it is therefore necessary to focus on the creation of a level playing field between SSS and road transport.



A number of inland ports are offering short sea connections, where this is geographically possible. They face a certain peculiarity concerning customs procedures. Currently any SSS transport from an

inland port has to undergo customs procedure in the respective seaport, even when the inland port and the seaport are located within the same Member State. It is self evident that such practice tends to severely undermine the potential to enhance SSS transport from and to inland ports, thus making the European hinterland more accessible for SSS.

EFIP is calling upon the decision-making bodies on European and national level to create and implement measures that are capable to overcome the currently existing administrative bottlenecks with regard to SSS.



6

INLAND WATERWAYS

Transport of goods on the European inland waterway network is by far not limited to the transport of bulk. The highest figures of growth on inland waterways can be detected in the field of containerised goods. Highly innovative logistic solutions are offered within a fully liberalised market that meets customers' demands.

It is, however, very lamentable that the high potential of inland waterways seems not to be recognised. Inland navigation still has, without deserving it, the image of a slow and conservative transport mode. The necessity to overcome this negative and unfounded notion resulted in a joint effort of European inland waterway promotion bureaus to create a European promotion association on inland navigation. It proved important to promote the advantages of inland waterway transport more offensively.

Transport on inland waterways is not only highly performing but also possibly the most environmentally sustainable mode. Thus, its overall capacity and potential remains, under the current limits of political and public perception, under exploited.

However, full exploitation of such potential will require high investments into the European waterway infrastructure. The removal of infrastructural bottlenecks on already existing waterways is of paramount importance. Namely improvements on the Danube and also on the Elbe are urgently needed to make these waterways a reliable part of the network, especially with regard to the enhancement of the European transport network after enlargement.



Moreover, the need for further interconnections between the different river basins in Europe merit closer consideration. Connecting the Danube with the Odra and the Elbe via a canal is without doubt ambitious but may prove as a necessary improvement to build a central European waterway network. Within this context, a link between the Rhine and the Rhône should once more come under consideration. All those improvements will contribute to the possibility of shifting more freight away from road. Their environmental impact must therefore be counterbalanced against their positive long-term benefits to sustainable transport.

Improvements on the European inland waterway network, however are not only necessary with regard to large infrastructures. Moreover, the concept of so-called "waterway branches" should be pursued further. The revitalisation of abandoned river and canal systems as well as infrastructural improvements on existing smaller waterways on an European scale will help to enhance the network and to bring the possibility of waterway transport closer to consumers' demands. Such demands exist and it would be worthwhile to examine the possibilities to meet them via the creation of respective offers of performing and reliable inland waterway infrastructure also on a smaller level.

EFIP is fully supporting the efforts to make the pan-European system of inland waterways much more reliable than it is today. Improvements are necessary to overcome existing infrastructural bottlenecks. EFIP is actively lobbying in favour of a European aid scheme in order to (re-) integrate smaller waterways into existing networks. Any infrastructural improvement to inland waterways has to be evaluated against the background of its long-term benefits and not against a potential short-term environmental impact.

7 PORT, CITY, REGION

Inland ports do not only play an important role in European transport policy but also have a considerable impact on the socio-economic reality in the city and region they are located in. They create direct and indirect employment, thus generating added value to regional economies.

The integration of ports into the urban and regional framework of development is a crucial issue for the members of EFIP. It is unquestioned that the existence of an inland port in a specific region contributes to the region's capability to foster sustainable transport to and from the region. Inland ports allow for the delivery of goods to the consumer by environmentally friendly modes. Every shipload and every rail load to be transhipped in inland ports replaces

a multitude of trucks that would contribute to an even further congestion of the regional road and motorway network. Against this background the potential of inland ports as a gate for long distance transport from and to cities and regions cannot be questioned.

But also with regard to urban logistics the existence of inland ports results in regional and urban benefits. Many ports within EFIP take up the challenge to become a centre for urban logistics. Moreover they see their responsibility in maintaining the urban and regional importance of the respective waterway for a wider public. The building of leisure facilities and the maintenance of rivers and canals in urban areas for the use of leisure and tourism is another side of the various activities of many ports.

Nevertheless, challenges exist with regard to the central location of many ports. The advantages of such central location often result in a great competition for the port's territory questioning its usage as port area. Almost all EFIP member ports faced this challenge or are currently facing it. Obviously there is no unanimous answer to this solution, but generally these challenges require ports to use their creativity and to develop solutions that are more beneficial for general interests than other suggestions.



EFIP emphasizes the socio-economic role of inland ports in their respective cities and regions. It is, however, the task for every single port to justify its existence in terms of economic and social development. Inland ports' integration in urban and regional planning is crucial with regard to their accessibility for environmentally sound transport. Consequently, the benefits that result from their existence outweigh potential nuisances.



approach of our new Ukrainian member may serve as an example when the role of ports as consumer oriented service providers will be developed further.

2. Bulgaria

EFIP moreover welcomes the newly founded Association of Bulgarian Ports, Port Operators and Concessioners. This association comprises Bulgarian river and sea-river ports along the Danube and on the shore of the Black Sea. The new Bulgarian member also brings in the expertise of port operators and concessioners.

3. Romania

Last but not least, EFIP welcomes cordially the membership of the Romanian Administration of River Ports on the Danube in Giurgiu. The new member is the administrative body for port infrastructure and, in addition, it serves as a promoter for the interests of Romanian inland ports with the main task to facilitate their integration into the pan-European inland waterway network.

EFIP is looking forward to a very fruitful co-operation with its new members. The geographical location of our new members in Ukraine, Bulgaria and Romania underlines once more the importance of countries from Eastern Europe in the creation of a pan-European transport policy. Their input in our federation's work will be crucial and EFIP is convinced that the new membership of the above mentioned ports and port association will serve for mutual benefits.



Place Leroux de Fauquemont - BP 1394 R.P.
59015 LILLE CEDEX - FRANCE
Tél. (33) 03 20 22 73 80 Fax. (33) 03 20 22 81 67
e-mail: contact@portdelille.com
Internet: www.portdelille.com

THE PORT OF LILLE

Part of the Lille Metropolis Chamber of Commerce and Industry, the Port of Lille is, with a 7 million tons traffic, one of the most important inland Port in France.

Strongly involved in multimodality, it manages a Containers terminal (75.600 Teu's in 2001), waterways lines from/to Dunkirk, Antwerp and Rotterdam and rail lines from/to Le Havre.

Storage, orders preparation, handing, industrial land renting in the Lille expending area, offices renting, services for truckers: more than a port!



1. NEW PRESIDENCY

Probably the most important internal change of EFIP took place during the General Assembly on 24 May 2002. Mr Heinz Hagen, who presided the Federation from 2000 until 2002, ended his term as EFIP President. Mr Hagen, who also retired from his position as Director of the Port of Enns / Austria and chairman of the Austrian

Federation of Inland Ports, was succeeded by Charles Huygens, Director General of the Port of Brussels. The two Vice-Presidents, Mr Gilles Leblanc (Port Autonome de Paris) and Mr Erich Staake (Duisport AG) were confirmed in their positions.

EFIP would like to express its gratitude to Mr Hagen. Especially his dedication for the specific problems of the members from Central and Eastern Europe was remarkable.

2. EFIP - EIA INTERMODAL SEMINAR

In co-operation with the European Intermodal Association EFIP organised a seminar on Intermodality on 30 April 2002 in Liège. It was the aim of this workshop, that took place for the first time, to serve as a forum for open discussion. The seminar proved very useful to bring together stakeholders from the European railway sector and representatives from inland ports. The meeting underlined the mutual dependence. The rail sector recognised the importance of inland ports as multimodal terminals close to consumers. Inland ports as well regard railways as a strategic partner in the creation of intermodal structures.

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3. ERICH STAAKE SPEAKER AT INTERMODAL EU-US

EFIP Vice President Erich Staake, CEO of the Port of Duisburg, was one of the speakers during the annual summit of stakeholders in intermodal transport from Europe and the US, held in Jacksonville, Fl. in



May 2002. The speech that Mr Staake delivered concentrated on existing best practices in intermodal transport to and from the Port of Duisburg. Moreover, he focused on the conception that inland ports cannot be reduced to their role of landlords and waterway stations. Their intermodal potential can only be exploited best when they enter the stage more proactively as providers of services, offering their customers an all-inclusive service package. The Logport Project, that has been initiated by the Port of Duisburg and that will serve as a logistic hub for the Ruhr Area and neighbouring regions is a vivid example for such new definition of the role of inland ports. Mr Staake convinced the audience that own-initiative and the exchange of best practices could be more beneficial for the creation of intermodal structures than to entirely rely on the expectation of public funding.

4. STATUS OF AGREED ASSOCIATION WITH CCNR

The Central Commission for the Navigation on the Rhine (CCNR) accepted EFIP, together with certain other organisations, as an agreed association. The status was granted during the spring session 2002 of the CCNR. This statute enables EFIP to accompany the work of the CCNR via its consultative committee. Moreover

the agreed associations have the right to be heard in the respective committees of CCNR.

5. BLACK SEA TRANSPORT NETWORK, CORRIDOR VII

The self-definition of EFIP as the representative of inland ports in countries not limited to the Member States of the EU traditionally results in a high interest for issues of pan-European transport policy. Against this background the participation in this year's conference on the building-up of a Black Sea Transport Network should be mentioned. Not only the fact that a considerable amount of EFIP member ports have direct access to the Black Sea via the Dnepr and the Danube, but also the strategic importance of this region for future transport gateways to Asia makes the Black Sea a point of interest for our federation.

Moreover, EFIP was invited to attend the meetings of the steering committee of Corridor VII (The Danube) in a gesture to open the work of the Corridor to associations.

6. COMMON INITIATIVE IN FAVOUR OF THE MARCO POLO PROGRAM

A large number of associations from the European transport sector joined an initiative proposed by EFIP to send a clear sign to the European Council of Ministers to refrain from any intention to reduce the budget of the Marco Polo program. A respective letter was sent to the Ministers of Transport of all 15 Member States that emphasized the crucial importance Marco Polo has for the enhancing of intermodal and environmentally friendly transport in Europe. The initiative has been signed by EFIP, INE, EIM, EIA, UIRR, ERFA, EBU, CER, UIP and Short Sea Promotion Flanders.

PRESIDENCY

President: Ch. Huygens (B)
Vice-President: G. Leblanc (FR)
Vice-President: E. Staake (D)

EXECUTIVE COMMITTEE

One representative per national federation or member port

Meets twice a year

Austria	Walter Edinger	Gregor Wöss
Belgium	Charles Huygens Willy Robijns Marie-Dominique Simonet Dirk De Smet Jan Tielens Alain Lefèbvre	Claude Martin
Bulgaria	George Petkov	
Croatia	Zrinko Zvocak	
Czech Republic	Jindrich Vodicka	
Denmark	John Morgen	-
Finland	Seppo Kesti	Matti Reijonen
France	Gilles Leblanc	Bernard Pacory
Germany	Erich Staake	Sigurd Kunkel
Hungary	Miklos Agh	Laszlo Mester
Italy	Rafaele Bazzoni	
Luxembourg	Robert Holzem	-
Netherlands	Winfried Lemmens	Bert Luijendijk
Portugal	Francisco Lopes	A. Granata Costa
Romania	Silviu Munteanu	
Slovakia	Ivan Kotvan	Ladislav Gnacek
Sweden	Patrick Åman	-
Switzerland	René Hardmeier	Jean-Pierre Cappelletti
Ukraine	Viatcheslav Vdovitchenko Yurij I. Tutushkin	- Nina Brovynska

GENERAL ASSEMBLY

Representation of Members
Supreme decision making body

Meets once a year

SECRETARY GENERAL

Jürgen Sturm

WORKING GROUPS

- CEEC
- Technical Affairs
- Exchange of Experts

EFIP MEMBERS

Country	Address	Phone and fax	Internet
AUSTRIA	INTERESSENGEMEINSCHAFT ÖFFENTLICHER DONAUHÄFEN ÖSTERREICH (IGÖD) Wiener Hafen Seitenhafenstrasse 15 A- 1023 Wien Contact: Mr. W. Edinger	T. + 43 1 727 16 100 F. + 43 1 727 16 200	e-mail: walter.edinger@hafen-wien.co.at http://www.hafen.co.at
BELGIUM	NV ZEEKANAAL EN WATERGEBONDEN GRONDBEHEER VLAANDEREN Oostdijk 110, B - 2830 Willebroek Contact: Mr. W. Robijns	T. + 32 3 860 62 72 / 62 11 F. + 32 3 860 62 78	e-mail: willy.robijns@zeekanaal.be http://www.zeekanaal.be
	PORT DE BRUXELLES Place des Armateurs 6, 1000 Bruxelles Contact: Mr. Ch. Huygens	T. + 32 2 420 67 00 F. + 32 2 420 73 90	e-mail: chuygens@port.irisnet.be http://www.portdebruxelles.irisnet.be
	PORT AUTONOME DE LIÈGE Quai de Maestricht 14, 4000 Liège Contact: Mrs. M.-D. Simonet	T. + 32 4 232 97 97 F. + 32 4 223 11 09	e-mail: info@liege.port-autonome.be http://www.liege.port-autonome.be
	PORT AUTONOME DE CHARLEROI Rue de Marcinelle 88, 6000 Charleroi Contact: Mr. D. De Smet	T. + 32 71 31 96 33 F. + 32 71 32 44 57	e-mail: info@charleroi.portautonome.be http://www.charleroi.portautonome.be
	PORT AUTONOME DE NAMUR Place Léopold 7, 5000 Namur Contact: Mr. C. Martin	T. + 32 81 24 09 56 F. + 32 81 24 09 55	e-mail: cmartin@met.wallonie.be
	PORT AUTONOME DU CENTRE ET DE L'OUEST Rue Boucquéau 13, 7100 La Louvière Contact: Mr. A. Lefèbvre	T. + 32 64 23 67 00 F. + 32 64 22 84 98	
	DIENST VOOR DE SCHEEPVAART Havenstraat 44 3500 Hasselt Contact: Mr. J. Tielens	T. + 32 11 22 59 12 F. + 32 11 22 12 77	e-mail: directie@dienst-scheepvaart.be
BULGARIA	ASSOCIATION OF BULGARIAN PORTS (Port Operators and Concessioners) P.O. Box 2 9000 Varna Contact: Mr. G. Petkov	T. +359 52 600 468 F. +359 52 601 011	e-mail: trade_centre_v@yahoo.com
CROATIA	PORTS of OSIJEK and VUKOVAR (Luka Vukovar) Croatian Chamber of Economy County Chamber Osijek 31000 Osijek Contact: Mr. D. Majic	T. + 385 31 223 800 F. + 385 31 223 824	e-mail: dmajic@hgk.hr e-mail : luka-vukovar@vk.tel.hr http://www.webart.hr/tranzit/index.html http://www.tel.hr/luka-vukovar
CZECH REPUBLIC	CESKE PRISTAVY a.s. Jankovcova 6, 170 04 Praha 7 Contact: Mr. J. Vodicka	T. + 420 2 800 119 F. + 420 2 802 857	e-mail: vodicka@czechports.cz http://www.ceskepristavy.cz
DENMARK	PORT OF RANDERS (Randers Havn) Havnekontoret, Kulhomsvej 1 8900 Randers Contact: Mr. J. Morgen	T. + 45 86 42 10 57 F. + 45 86 40 71 81	e-mail: john.morgen@randers.dk
FINLAND	LAKE SAIMAA PORTS ASSOCIATION (City of Kuopio) Suokatu 24 70100 Kuopio Contact: Mr. S. Kesti/M. Reijonen	T. + 358 17 183 301 F. + 358 17 185 309	e-mail: seppo.kesti@kuopio.fi http://www.lappeenranta.fi
FRANCE	ASSOCIATION FRANCAISE DES PORTS INTERIEURS (AFPI) Place Leroux Fauquemont, BP 1394 RP 59015 Lille Contact: B. Pacory	T. + 33 3 20 22 73 80 F. + 33 3 20 22 81 67	e-mail: contact@portdelille.fr http://www.afpi.org
	Quai de Grenelle 2 75015 PARIS Contact: Mr. G. Leblanc	T. + 33 1 40 58 28 06 F. + 33 1 45 78 08 57	e-mail: dg@paris-ports.fr http://www.afpi.org

Country	Address	Phone and fax	Internet
GERMANY	BUNDESVERBAND ÖFFENTLICHER BINNENHÄFEN (BÖB) Hammerlandstraße 3 41460 Neuss Contact: Mr. L. von Hartz/ Mr. T. Düttchen	T. + 49 2131 90 82 31 / 39 F. + 49 2131 90 82 82	e-mail: boeb@binnenhafen.de http://www.binnenhafen.de
	Alte Ruhrorter Strasse, 42-52 47119 Duisburg Contact: E. Staake	T. +49 203 803 315 F. +49 203 803 436	email: erich.staake@duisport.de
HUNGARY	HUNGARIAN INLAND PORTS Ferroport Budapest Szabadkikötő ut 5-7 1211 Budapest Contact: Mr. M. Agh/ Mr. L. Mester	T. + 36 1 278 40 11 F. + 36 1 278 40 00	email: mester@ferroport.hu http://www.ferroport.hu
ITALY	UNIONE DI NAVIGAZIONE INTERNA ITALIANA (UNII) San Marco, 39 12 30124 Venezia Contact: Mr. R. Bazzoni	T. + 39 041 522 07 62 / 523 61 F. + 39 041 523 63 57	email: unii@libero.it http://www.utenti.tripod.it/unii
LUXEMBOURG	PORT DE MERTERT Société du Port Fluvial de Mertert 6688 Mertert Contact: Mr. R. Holzem	T. + 35 2 74 04 64 F. + 35 2 74 88 13	email: info@portmertert.lu
NETHERLANDS	NEDERLANDSE VERENIGING VAN BINNENHAVENS (NVB) Vasteland 12 E 3001 BL Rotterdam Contact: Mr. W. Lemmens	T. + 31 10 411 59 00 F. + 31 10 412 90 91	email: nvb@binnenvaart.nl http://www.port.rotterdam.nl
	Postbus 6622 3002 AP Rotterdam Contact: Mr. B. Luijendijk	T. + 31 10 252 15 78 F. + 31 10 252 19 86	e-mail: bert.luijendijk@port.rotterdam.nl http://www.port.rotterdam.nl
PORTUGAL	INSTITUTO DE NAVIGABILIDADE DO DOURO (Ports of Douro, Sardoura and Lamego) Qta. Do Paço - Godim 5050-071 Peso da Régua Contact: Mr. F. Lopes	T. + 351 254 32 00 20 F. + 351 254 32 40 43	e-mail: ind@mail.telepac.pt http://www.ind.pt
ROMANIA	ADMINISTRATION OF RIVER PORTS ON THE DANUBE Str.Portului nr. 1 O.P.I, C.P. 2 8375 Giurgiu Contact: Mr. S. Munteanu	T. +40 46 21 30 03 - 21 15 28 F. +40 21 31 10 5 21	e-mail: apdf@pcnet.ro http://www.apdf.ro
SLOVAKIA	PORTS OF BRATISLAVA AND KOMARNO (Slovenska Plavba a Pristavy a.s.) Divisa Pristav Bratislava Pristavna 10 821 09 Bratislava Contact: Mr. I. Kotvan	T. + 421 2 534 145 32 F. + 421 2 534	e-mail: business.spap@spap.sk http://www.spap.sk
SWEDEN	MÄLARHAMNAR AB (Ports of Köping & Västerås) Sleglartgatan 3 721 32 Västerås Contact: Mr. P. Aman	T. + 46 21 15 01 00 F. + 46 21 15 01 40	e-mail: patrick.aman@malarhamnar.se http://www.malarhamnar.se
SWITZERLAND	PORTS OF BASEL (Rheinhäfen Beider Basel) Hochbergerstrasse 160 4019 Basel Contact: Mr. R. Hardmeier	T. + 41 61 631 45 45 F. + 41 61 631 45 94	e-mail: r.hardmeier@portofbasel.ch http://www.portofbasel.ch
UKRAINE	DANUBE SHIPPING MANAGEMENT SERVICE GMBH Handelskai 388/832 1020 Vienna Contact: Mr. V. Vdovitchenko	T. + 43 1 728 69 34 F. + 43 1 728 20 76	e-mail: dsmsvienna@magnet.at
	KHERSON SEA COMMERCIAL PORT Ushakov avn., 4 73000 Kherson Contact: Mr. Y. Tutushkin/Ms. N. Brovynska	T. +380 552 22 32 48 F. +380 552 32 52 52	e-mail seaport@ukrincom.net e-mail logistic@celogin.com.ua



EFIP
Place des Armateurs 6 • B - 1000 Bruxelles
Phone: +32 2 420 70 37 • Fax: +32 2 420 03 71
E-mail: efip@skynet.be • www.inlandports.org



Fédération Européenne des Ports Intérieurs
Europäischer Verband der Binnenhäfen
European Federation of Inland Ports