













THE EU-25: A maritime region per excellence					
the key to cohesion in Europe!					
	Population		GDP growth	Unemployment	Inflation
Economic indicators	(million)	GDP/head in PPS	(%)	(%)	(%)
<ul> <li>Poland</li> </ul>	38.6	9,410	1.1	20.0	1.9
<ul> <li>Czech Republic</li> </ul>	10.3	13,700	3.3	7.3	1.4
<ul> <li>Hungary</li> </ul>	10.2	12,250	3.7	5.6	5.2
<ul> <li>Slovak Republic</li> </ul>	5.4	11,200	3.3	19.4	3.0
<ul> <li>Slovenia</li> </ul>	2.0	16,210	3.0	6.0	7.5
<ul> <li>Estonia</li> </ul>	1.4	9,240	5.0	9.1	3.6
<ul> <li>Lithuania</li> </ul>	3.5	8,960	6.0	13.1	0.4
<ul> <li>Latvia</li> </ul>	2.4	7,750	7.7	12.9	2.0
<ul> <li>Cyprus</li> </ul>	0.8	17,180	4.1	5.3	2.8
Malta	0.4	n.a.	- 0.8	7.5	2.2
Total of new entries	74.9	10,700	2.4	(15.1)	n.a.
15 EU members	377.9	23,210	1.5	7.5	2.1
1200 Seaports for 100,000 km coasts + 36,000 km inland waterways         → 40% of intra-Community trade in tkm         → 3 blin tons port throughput = 50% bulk +14% roro + 33% ctrs         → 30% = Rotterdam, Antwerp & Hamburg <-> 20% = 9 Med. ports!?         Source: EUROSTAT, 2003 - PPS = Purchasing Power Standards         PR6 20 MV 207       Pert Wilky Winkergame       5/52					

### RELEVANT DISCUSSION THEMES GIVEN THE EU common port policy

1. Are political decisions w.r.t port development guided by economic objectives?

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- 2. How to secure the port capacity (in Europe)?
- 3. How to avoid the aggravating time lag between conceptualisation and implementation of a development project?
- 4. How to secure public support or to avoid further governments' retreat in funding or supporting ports?

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5. Does port development induce a renewed port hierarchy within (European) port system?

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	Strategic concentration mega-alliances	ns into
A. 15 14	ASIA/EUROPE TRADE ASIA/US WEST COAST TRADE	GLOBAL TRADE
	Alliances on 1 trade	Global Alliances
2 Smell	Maersk Maersk Sea-Land	Maersk Maersk Sea-Land
Com Cal	NYK Hapadgoyd Not	NYK Hapidgoyd NYK Hapidgoyd
<ul> <li>From 13 players in</li> </ul>	Moll CGM MISC         MOL K-Line         MOL K-Line         MOL	MOL APL OCOCL (PAONE) MOL APL NOL APL NOL APL NOL APL NOL APL NOL APL NOL APL NOL APL NOL APL
1994 to 7 players in 2004	Sea-Land Yangming Sea-Land Yangmin	g COSCO K-Line Yangming
Global alliances are the norm	Yangming UASC COSCO COSCO COSCO COSC	COSCO HMM Norasia
<ul> <li>Bargaining power of key players is huge</li> </ul>	Banjin DSR-Senator Choyang Evergreen LT Evergreen LT Evergreen LT Evergreen LT Evergreen	DSR Senator Choyang Harm
<ul> <li>Frequent changes (mergers/alliances)</li> </ul>	LT MSC	Evergreen
of partners	1994 1995 1996	1997 1998
Power of lines and alliances is increasing !	1994 13 players GLOBAL ALLIANCES ARE 1	THE NORM 2004 7 players

























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![](_page_5_Figure_5.jpeg)

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nan (n Kanan Karang Kananan Arang	TRANSPOR	RT MO	DE?		
TIME TO RE-	Source: W. Blonk				
POSITION	ASPECTS	Pipelines	Railw ays	Inland Nav.	Road Transp.
TRANSPORT BY	Size and/or volume	1	3	2	4
	Speed/Rotation Time (*)	1-4	3	2	1
FIFELINES	Accessibility (*)	1-4	2	3	1
GIVEN NEW	Variability	3	2	2	1
POSSIBILITIES	Flexibility (*)	1-4	3	2	1
	Frequency/Punctuality	1	4	2	3
OF TUDELAR	Risk of Cargo Damage	1	3	2	4
TRANSPORT	Transportation cost per tkm	1	3	2	4
	Capacity	1	3	2	4
	Reliability	1	4	2	3
	Penetration (*)	1-4	2	3	1
	Externalities	1	3	2	4
(*) Pipelines in use deliver goods immediately to the consumer (score 1). In terms of door-to-door delivery pipelines are perfect qua accessibility and penetration (score 1). As a function of the 'desired' product-mix the flexibility also is quite acceptable.					
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![](_page_8_Figure_1.jpeg)

M.CO.	(RE-)POSITIONING OF PIPELIN	ES?
tati in Bengton mag Managalater Aurong	SUMMARY AND CONCLUSION	
Any to of tub	ransport modal comparison turns out oular transport due to:	t in favour
sm (opp	all space intensity + "double" use of portunity cost of underground infrastructures is nearly a	space
∎ hig fre	h degree of performance regarding d quency, speed, reliability and punctu	lamage, ality:
■ ver rot	y good performance regarding capac ation time, transport costs,	ity,
	no influence of bad weather conditions, con no (route) problems, incl. the repositioning haulages	ngestion, g of empty
∎ ext the	remely low social transport cost com e relative high construction cost	pensating
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![](_page_8_Picture_3.jpeg)

![](_page_9_Picture_0.jpeg)

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## 4. EMERGENCE COMMON PORT POLICY IN THE EU?

## THE PRINCIPALVIEWPOINT IS OK

- "Well functioning ports are essential for Europe: they constitute an essential nodal point in the chain of transport of goods exported/imported in and out of the European Union as well as of goods moving within the Union or inside a Member State"
- "The development of the maritime sector and short sea shipping is key to a balanced EU system of transport; an adequate distribution of quality ports on the shores and rivers of the Union with appropriate hinterland connections is key to an efficient and sustainable EU transport network"
   ETC. etc. ...

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LIC. ClC.

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## WHAT DOES THE MARITIME INDUSTRY (i.e. ports included) NEED IN VIEW OF COST-EFFICIENT PORT COMPETITION?

- 1. No monopolistic entry barriers => no market domination
- 2. Free market principals regarding port operations, land concession and authorisation policies
- 3. Favourable investment climate, based upon
  - long term planning procedures,
     Volumes to be guaranteed,
  - volumes to be guarantee
     Low risk premiums, ...
- 4. Effective level playing fields, both inside and
  - outside the port, i.e. 1. competition always to be based upon price and quality,

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- escaperation anways to be based upon price and quality,
   never on state aid, neither on region specific regulations w.r.t. environment, safety, labour, ...

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THE NEW CPP OF THE EU IN A NUTSHELL (2)
 effectiveness of the level playing field (clarity for investors, operators and users as regards role of port authorities, state aid to ports, port concessions, technical-nautical services, cargo-handling and port dues)
 establishing structural dialogue between ports and cities (improving the port image!)
 enhancing the dialogue between social

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annuncing the dialogue between social partners and port operators (incl. training, health and safety at work)

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## SOME ADDITIONAL COMMENTS by the FPC (1)

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- 1. The great variety in port authority systems deserves to stay, hence **no unique management model** exists.
- 2. A clear **distinction between public and commercial tasks of the port authority** is necessary irrespective of the organisational structure chosen.
- **3. Duration of port concessions** must be reasonably long given the true nature of investments in a free market
- 4. Cost of maritime access to seaports such as for public "roads" - is on behalf of the whole community and therefore not to be recovered by user charges. Subsidisation for one user is totally forbidden.
- 5. Co-operation between ports is a free market issue, not a public top-down issue

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# SOME ADDITIONAL COMMENTS by the FPC (2)

- Technical-nautical services belong to the public responsibility; they are of general economic importance (pilot exemption certificates could be accepted in very specific cases)
- The EC must not interfere directly in the freight distribution patterns throughout Europe, but can indeed promote modal shifts by supporting multimodality and the concept of motorways of the sea.
- 8. The EC should indeed support **actions to achieve a broad social basis** for further port development in Europe

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## 6. Conclusions

- Being prime logistics zones ports rely on spatial and infrastructural quality and reliability of multi-modal hinterland connections
- **2. Port authorities** therefore should be well aware of the need to develop efficient inter-modal transport networks from and toward the hinterland
- Introduction of new innovative concepts such as ULS are becoming necessary to foster further the development of seaport-inland port networking. The Deurganck dock at the port of Antwerp may be considered as and interesting case.
- 4. Developing and bringing into force a sound common port policy within large competitive zones guarantees sustainable port development. In that respect the current effort of the EC to bring forward a European Port Policy is welcome in due time!

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