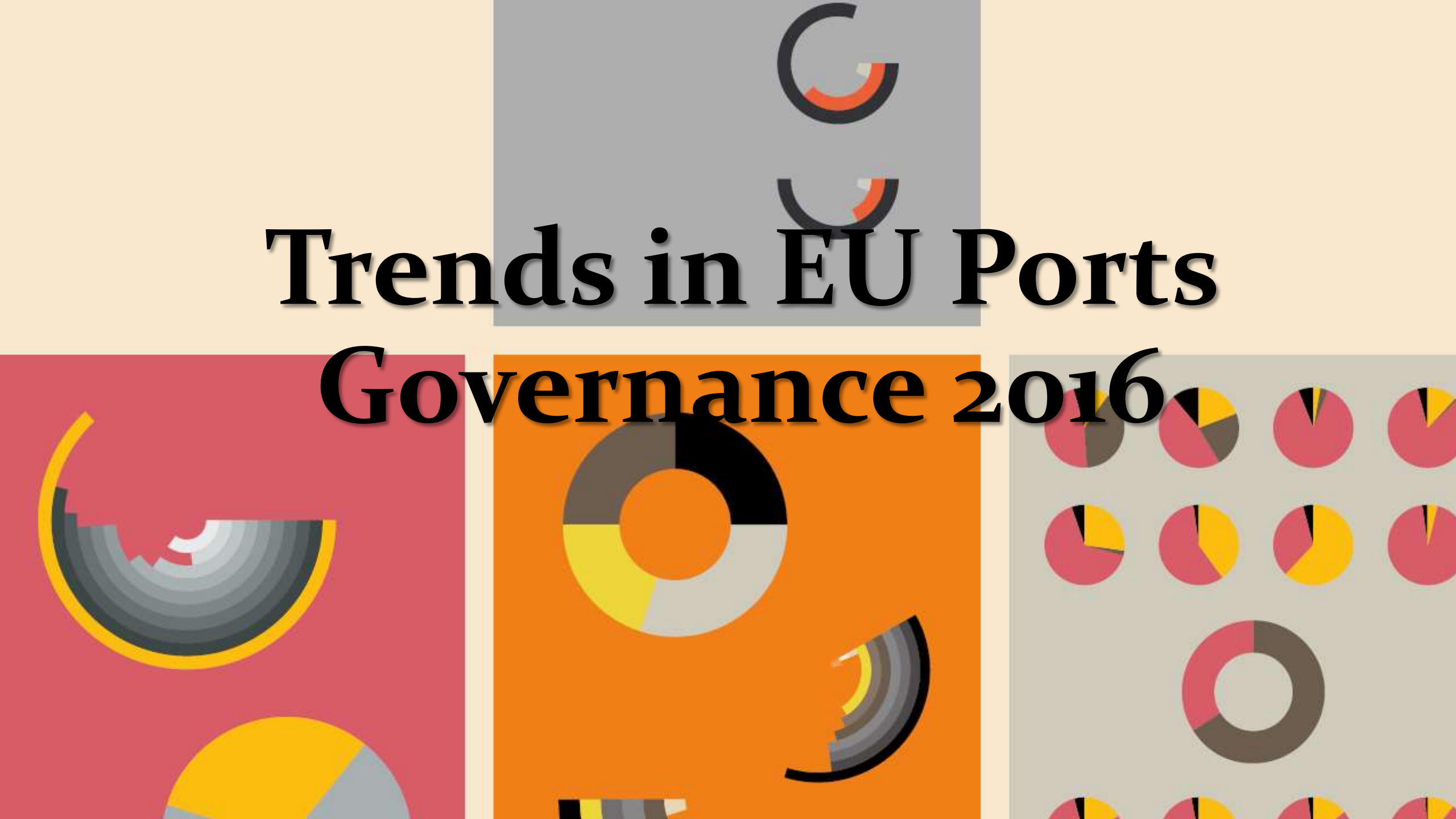


Trends in EU Ports Governance 2016





The **PORTOPIA** consortium consists of a combination of universities and industry partners.

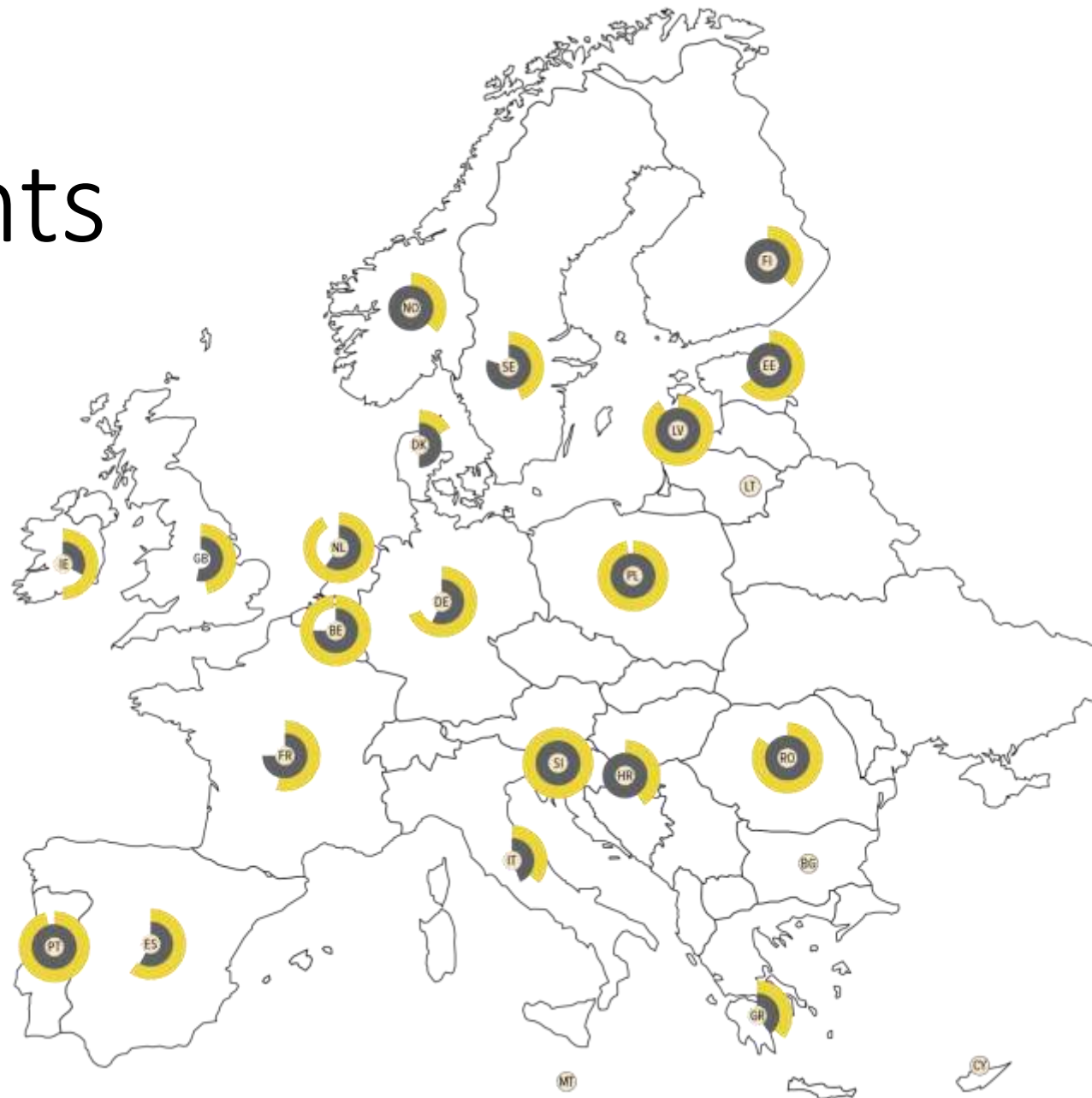


ASSOCIATED PARTNERS

The project also takes advantage of the expertise of more than ten associated partners who represent the port users and interest groups, resulting in an even more comprehensive coverage of the port industry.



Survey respondents



RESPONDENTS BY COUNTRY

Slovenia

- 100% Tonnage
- 100% Core ports

Belgium

- 99% Tonnage
- 75% Core ports

Poland

- 97% Tonnage
- 100% Core ports

Portugal

- 96% Tonnage
- 100% Core ports

Netherlands

- 92% Tonnage
- 60% Core ports

Latvia

- 91% Tonnage
- 100% Core ports

Romania

- 85% Tonnage
- 100% Core ports

Germany

- 69% Tonnage
- 57% Core ports

Estonia

- 65% Tonnage
- 100% Core ports

Spain

- 60% Tonnage
- 58% Core ports

France

- 54% Tonnage
- 75% Core ports

Ireland

- 50% Tonnage
- 33% Core ports

United Kingdom

- 47% Tonnage
- 53% Core ports

Sweden

- 44% Tonnage
- 80% Core ports

Croatia

- 41% Tonnage
- 100% Core ports

Finland

- 38% Tonnage
- 100% Core ports

Norway

- 37% Tonnage
- 100% Core ports

Italy

- 36% Tonnage
- 44% Core ports

Greece

- 36% Tonnage
- 40% Core ports

Denmark

- 17% Tonnage
- 50% Core ports

Bulgaria

- 0% Tonnage
- 0% Core ports

Cyprus

- 0% Tonnage
- 0% Core ports

Lithuania

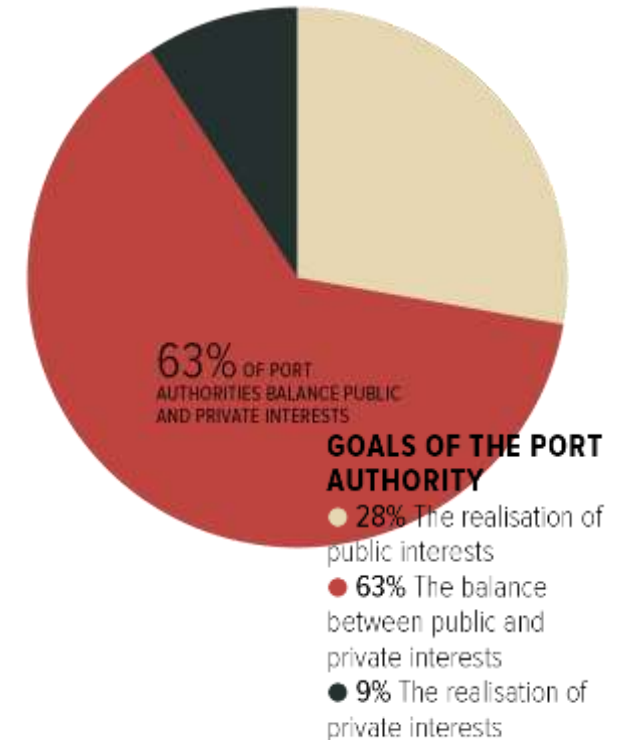
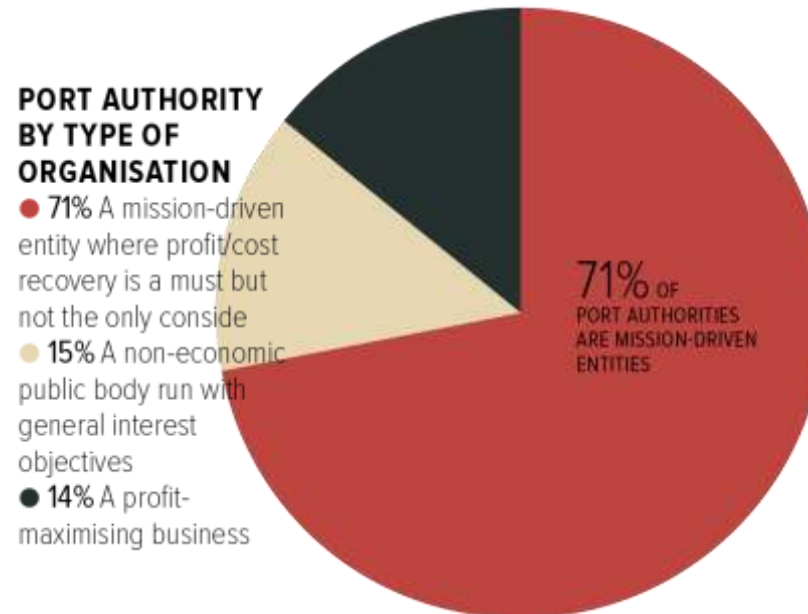
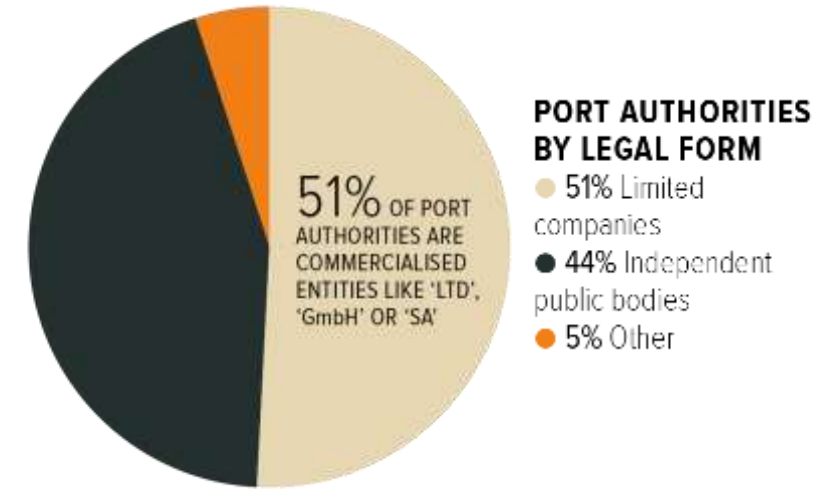
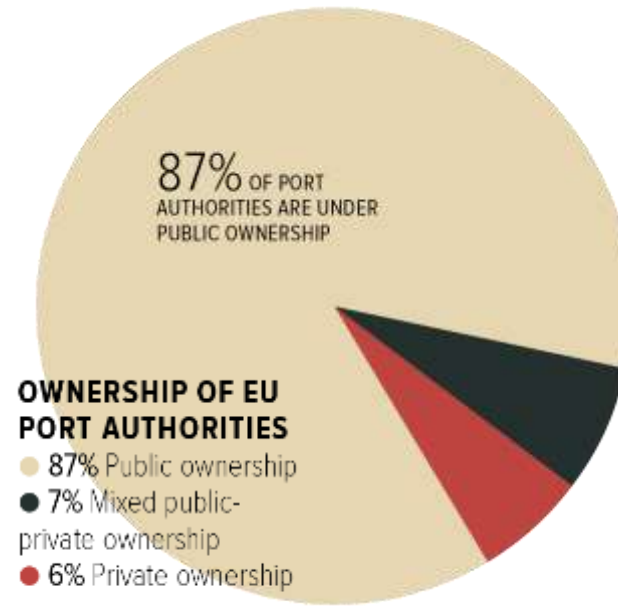
- 0% Tonnage
- 0% Core ports

Malta

- 0% Tonnage
- 0% Core ports

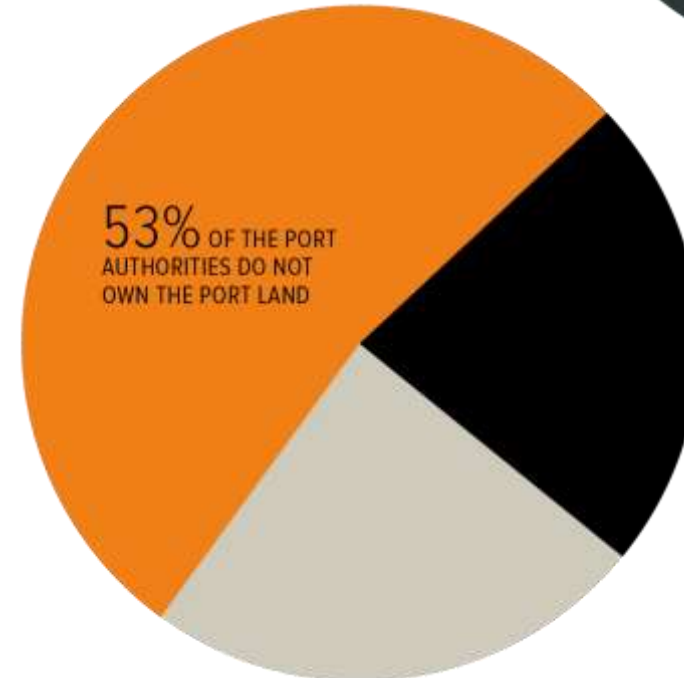
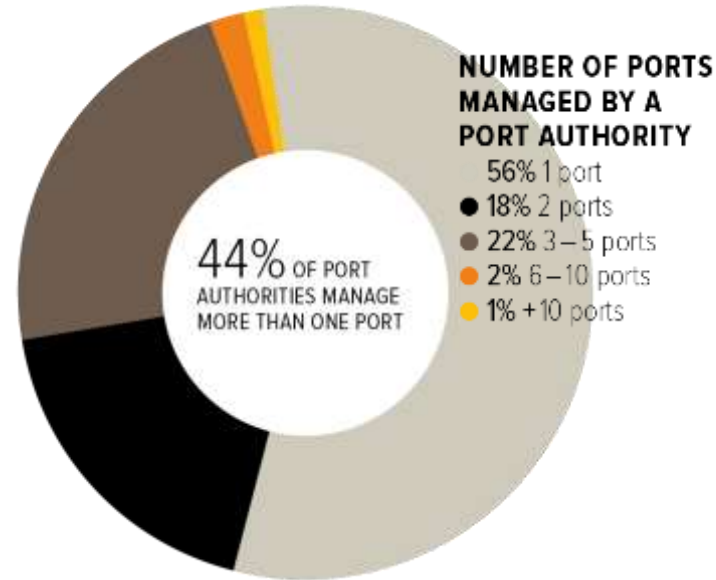
The hybrid nature of port authorities

- Seaports remain under public ownership, but are moving towards more private management
- Port authorities have both economic and non-economic objectives



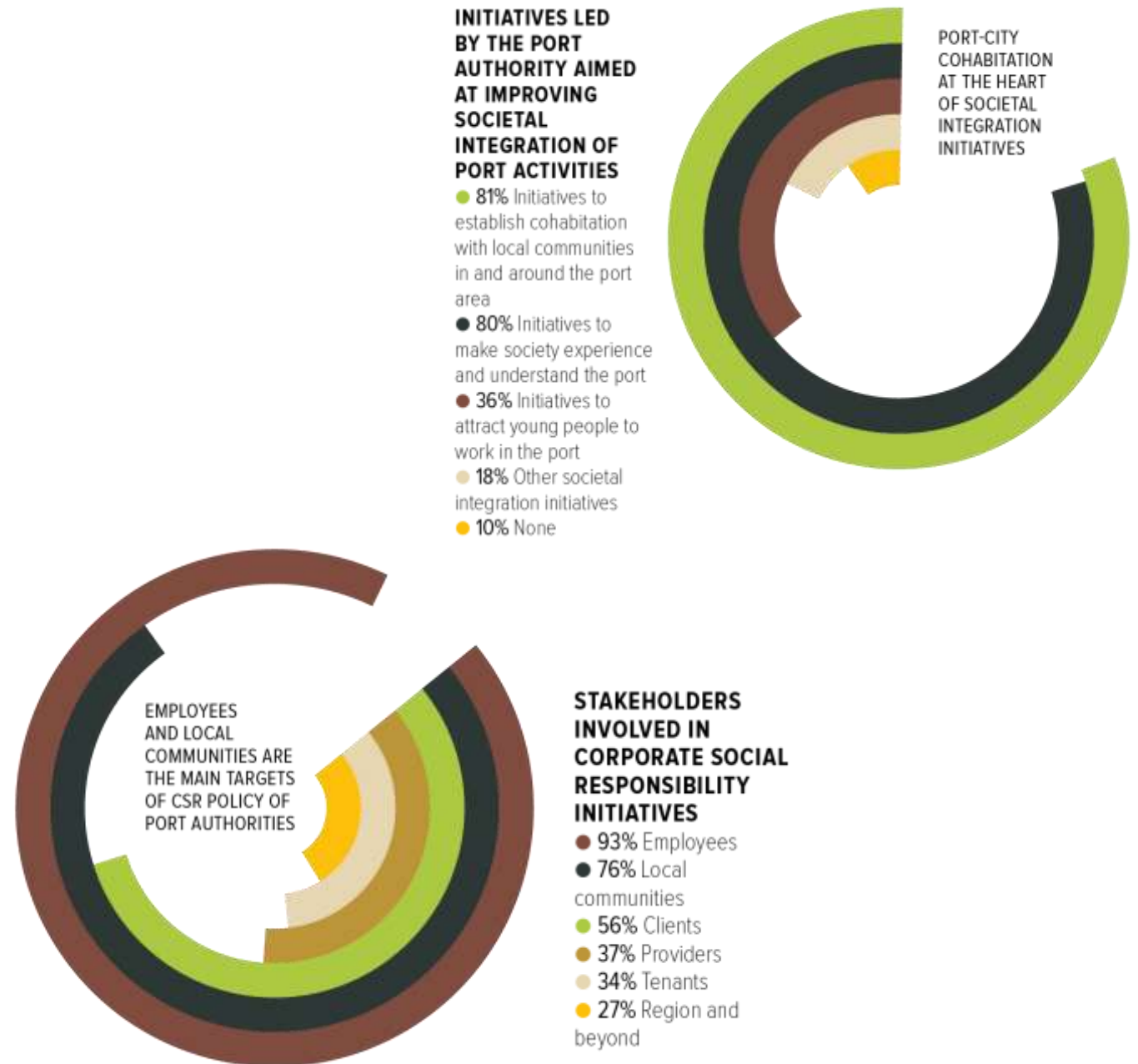
Optimising land use is a key function

- Merging of port authorities is happening either bottom-up or government-driven
- Port authorities develop the port hand in hand with key stakeholders



Societal integration of port activities

- Building beneficial relationship with employees and local community
- Finding the optimal balance between port operations and development and city wellbeing is one of the main challenges of port authorities



Port authorities are proactive TEN-T networkers

- Leading initiatives to enhance the port competitiveness across key areas
- Developing partnerships with other TEN-T nodes
- Port authorities are the main promoters of the port
- Stimulating innovation

IS THE PORT AUTHORITY LEADING THE OVERALL PROMOTION AND MARKETING ACTIONS OF THE PORT ON BEHALF OF THE PORT COMMUNITY?

● 86% Yes
● 14% No

86% OF THE PORT AUTHORITIES LEAD THE OVERALL PROMOTION AND MARKETING OF THE PORT

87% OF PORT AUTHORITIES LEAD INITIATIVES TO IMPROVE THE MARITIME ACCESS OF THE PORT

AREAS IN WHICH PORT AUTHORITIES ARE LEADING INITIATIVES TO IMPROVE THE COMPETITIVENESS OF THE PORT

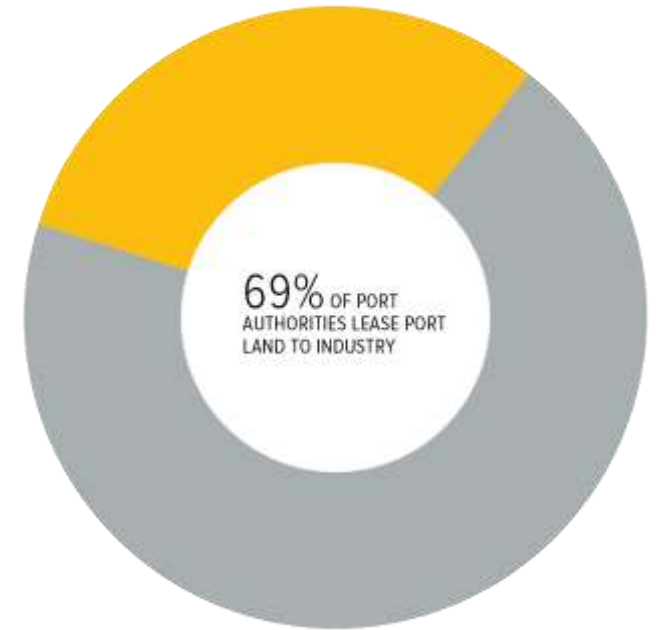
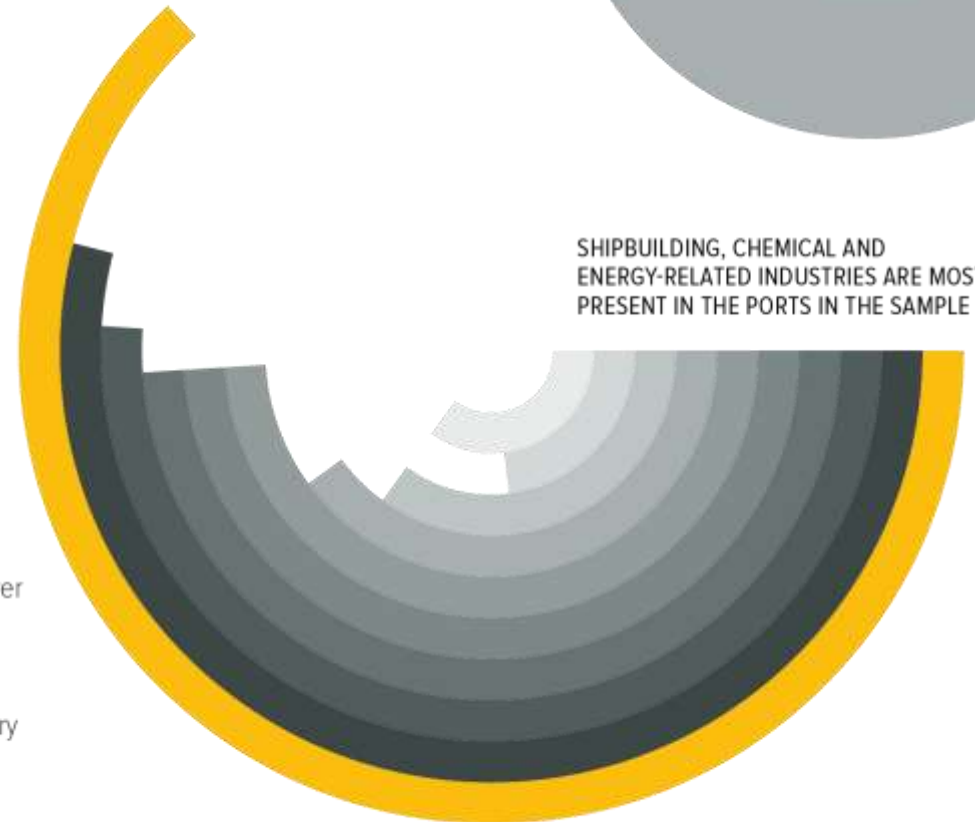
- 87% Improvement of maritime access of the port
- 78% Improvement of land access to the port
- 73% Improvement of the hinterland connections of the port
- 58% Intermodal operations in the port
- 58% Deployment of ICT (Information and Communication Technologies)
- 56% Facilitation of administrative procedures
- 45% Performance of government agencies acting in the port (customs, health, veterinary, etc.)
- 45% Fostering innovation
- 42% Reengineering of processes
- 5% Others

Ports are home and key partners of industrial clusters

- Industry located in the port is key for port authorities revenues
- Will industry continue to be present in ports?

SECTORS OF INDUSTRY IN THE PORTS

- 63% Shipbuilding
- 54% Chemical
- 51% Food industry
- 49% Electrical power
- 49% Petroleum
- 49% Construction
- 40% Steel industry
- 35% Fishing industry
- 23% Automotive
- 35% Other

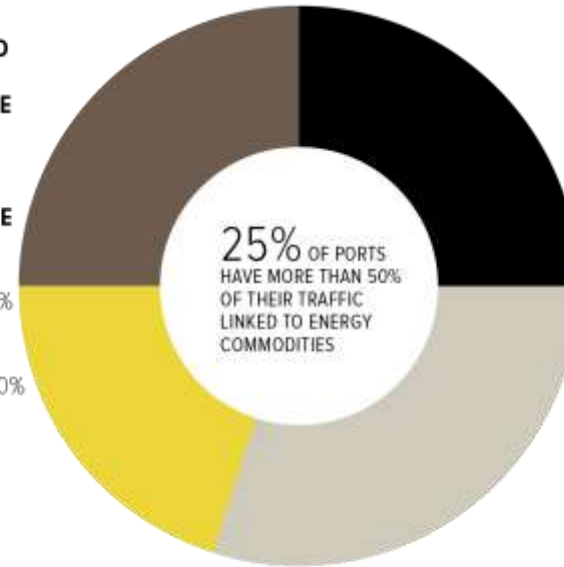


Ports are key players in the energy sector

- Main entry points of energy commodities and locations for energy production
- Port authorities are facilitators and supporters of the energy transition
- Energy management is a key concern of port authorities

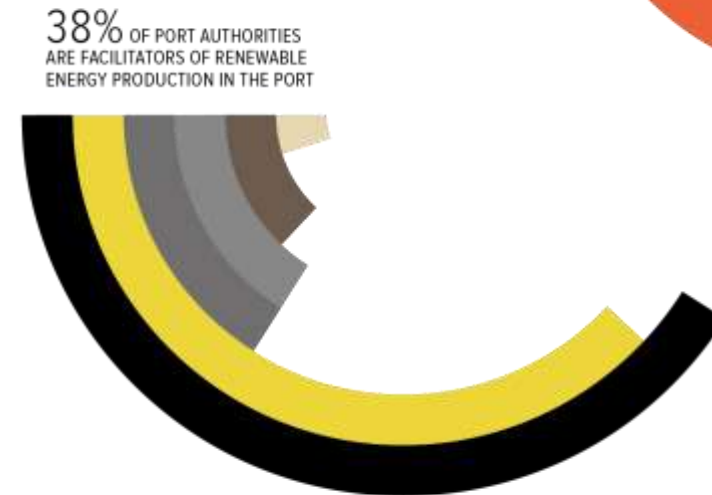
APPROXIMATE PERCENTAGE OF ENERGY-RELATED TRAFFIC IN THE PORT BY VOLUME (E.G. CRUDE OIL, REFINED PETROLEUM PRODUCTS, COKE AND COAL, LNG, ETC.)

- 25% Less than 10%
- 30% 10% – 30%
- 20% 30% – 50%
- 25% More than 50%

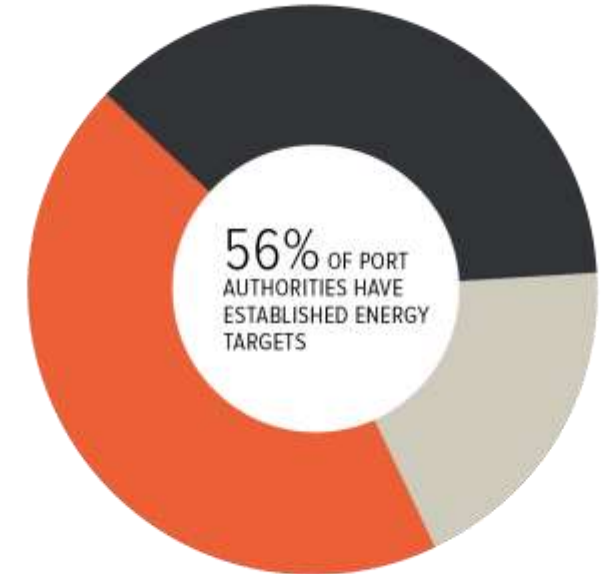


ROLE OF PORT AUTHORITY IN THE PRODUCTION OF RENEWABLE ENERGY

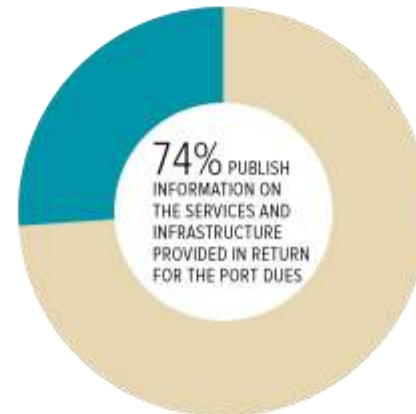
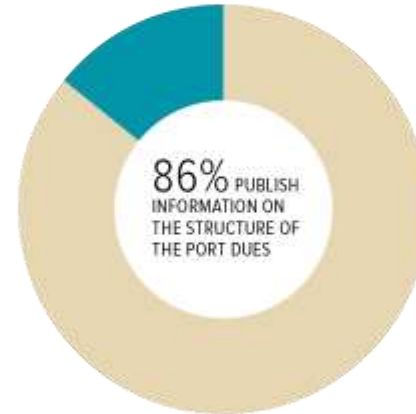
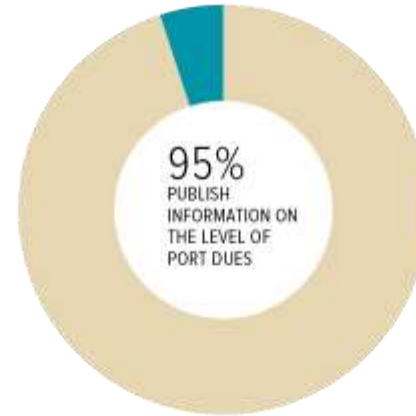
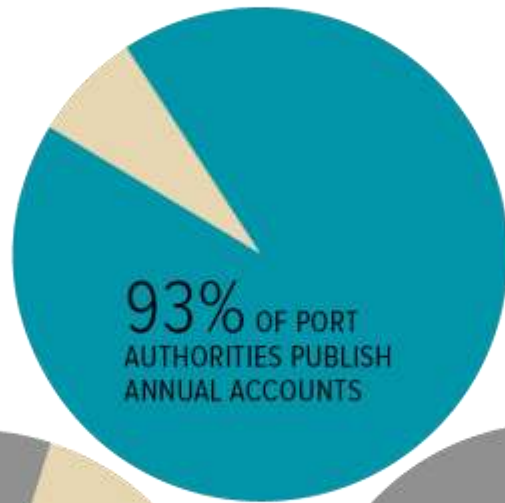
- 41% Provider of land
- 38% Initiator/facilitator
- 16% Logistics support
- 16% Investor/co-investor
- 13% Operator of the facilities
- 5% Other roles



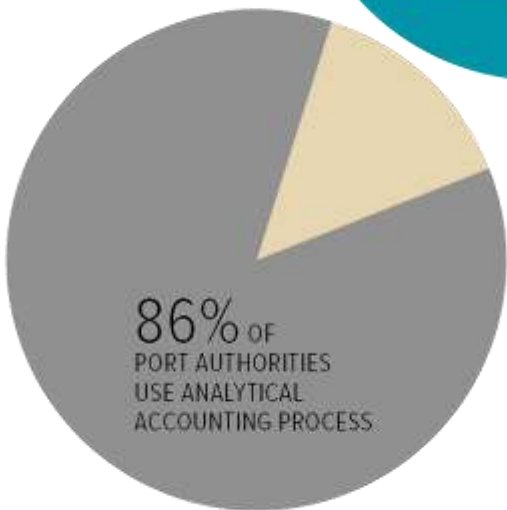
56% OF PORT AUTHORITIES HAVE ESTABLISHED ENERGY TARGETS



Good governance principles and increased transparency



- More and more adoption of international standards
- Port users adequately informed about port charges
- Half of PA formally monitor port customer satisfaction
- One out of four respondents monitors and reports on the quality of the port 's service providers



To be developed
until 2017:

<http://demo.portopia.eu/portopia-interface-web/login.jsf>

PORT'S PLATFORM:

- Port traffic statistics compiled and published on a quarterly basis
- Environment- Ecoports indicators
- Governance module showing characteristics of EU port managers and main governance trends





Thank you



Martina Fontanet – martina.fontanet@espo.be

ESPO – European Sea Ports Organisation

The European Port House

Treurenberg 6

BE-1000 Brussels

Belgium

