

WORKGROUP ON TRANSPORTS

FINAL DOCUMENT



Corfu, 11th June 2014

The Workgroup on Transports this year was in strict correlation with the EU Strategy for the Adriatic and Ionian Region and especially regarding the parameters and pillars, which were discussed during the stakeholder Conference held the last February in Athens.

The main subjects were:

4. Maritime transport
5. Intermodal links with the hinterland
6. Energy networks

During the Workgroup the first 2 topics were discussed more analytically.

2. Maritime transport

A significant deduction of transportation of passengers with RO-PAX between 2009 and 2013 was observed: it reached 26% and over 1.1 million passengers. Moreover, a reduction of the movement of TIR and TRAILERS was noticed.

During the Workgroup on Transports the participants analysed the example of Trieste as the only port where the movement of TIR, Trailers in RO-RO and RO-PAX registered an increase. The results of the study showed that:

- a) Trieste is linked with Turkey, a new market and a developing economy and
- b) Trieste has the absolute control of the whole system of transport and distribution of products thanks to the development of a strong multi modal system (railways-sea). There is a connection with the rail-network and the Public Private Partnership (PPPs), which invests in terminals.

Another noteworthy example discussed concerned the Port of Taranto. Only a couple of years ago, in the same context of the Workgroup on Transports during the 12th Edition of the Forum AIC, Taranto was presented as an example of remarkable increase in movement due to the fact that Evergreen had chosen it as its main Mediterranean transshipment port (in 2009 it reached 900.000 TEUS). At a later stage, the general slowdown of maritime exchanges and the simultaneous increase in competitiveness of the Southern Mediterranean ports led Evergreen to change its strategies and to leave the port of Taranto aside.

It was underlined, in addition, that the low cost airlines to Greece influenced the significant reduction in the maritime transports. This is a huge threat for ferry companies and for the recovery of this market.

3. Intermodal links with the hinterlands

A developing tendency was observed in the field of containers and in relevant investment with new container-platforms and other infrastructure. During the last 10 years we have perceived an increase of 1.5



million containers. In 2013 we had the movement of 2.5 million teus in the Adriatic and Ionian Region. This number surely sounds big but the reality is that it is relatively small compared to the ports of Northern Europe. Just to get an idea, 8 million teus was transported through the port of Hamburg, and to feel even worse we should clarify that the 2.5 million teus was transported from 7 different ports among which no one has any critical mass. Limits to the development of container traffic in the Adriatic and Ionian area consist exactly in the lack of a central logistic port, in the remarkable fragmentation of the current freight traffic and in the scarcity of multimodal solutions (except the cases of Koper and Trieste) that could enhance the connection among ports and farer catchment areas.

The Macroregion governance should support a policy for the development of multi-modality both in terms of infrastructure and services (as done in various European countries) in order to promote more sustainable maritime traffic.

Another sub-sector of transport is cruisers. We have observed an increase of aprox 5% during the last 5 years with 5 million passengers in the Adriatic and Ionian Region. Venice is holding the lead with 1.8 million passengers who embark and disembark in its port, second is Dubrovnik and third Corfu with 750.000 passenger transits.

At this point we will agree that the news are good as far as cruisers are concerned, BUT it is not that simple!

Increase in cruisers means more passengers. More passengers means bigger ships. Bigger ships means bigger ports and who has them?

In our region there is also an absolute dependence between cruisers and Venice, which immediately creates instability and does not leave room for investments due to the state of uncertainty referred to insecurity of navigation in the Venice lagoon.

We need to pay particular attention to cruisers. Cruiser ports do not need to be the biggest ports; also the development of tourism from cruisers along side with its contribution to the regional economy could be considerable!

Before concluding, two more aspects should be highlighted:

- 1) One is relevant to the necessity of forming a uniform legal framework related to the cleaning of shallows so that we avoid large lack of homogeneity, which costs.
- 2) The second point is that within the framework of the Macroregion, the isolation of the islands, not only from the other countries but from their own hinterland metropolitan area's is crucial and should be dealt with.

We all now speak about the Macroregion without many of us knowing what we refer to. We were fortunate to have the opportunity during the Workgroup on Transports to get acquainted with the example of another existing Macroregion, that of the Baltic Sea, and it was truly beneficial to see the connection among countries with no homogeneity in most sectors. This helped us to imagine our Macroregion.

Annex:

Observatory on Sea traffic in the Adriatic and Ionian basin
Report on traffic as of 2013
(Source – ISTAO Ancona)