



ECG Congress Malta May 19th, 2017

Speaker : Lamia Kerdjoudj-Belkaid

Secretary General of FEPOR



SENATOR

FEPORT membership consists of large, multinational terminal operating companies and national associations from the individual European Union member states.

The organization's aim is to promote the interests of our members and to maintain constant dialogue with all EU institutional and non-institutional stakeholders.



A.B.A.S.



Danske Havnerværksomheder



ZDS

Zentralverband der deutschen Seehafenbetriebe e.V.



Asso-logistica





1200 companies



40 billion€ investment
(in equipment and infrastructure over last 10 years)



220 000 employees



68 billion€
contribution to the GDP



425
terminals



1 050 000^a indirect jobs



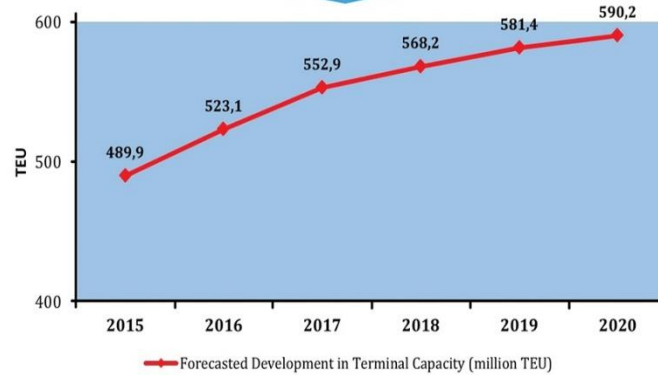
109 million TEU & 3.4 billion tons^b
of average throughput

*Figures are based on data provided by FEPORT members.

a. 1 000 000 tons of throughput creates 300 indirect jobs. - OECD Report 2013

b. non-containerized cargo

FORECASTED DEVELOPMENT IN TERMINAL CAPACITY (MILLION TEU)



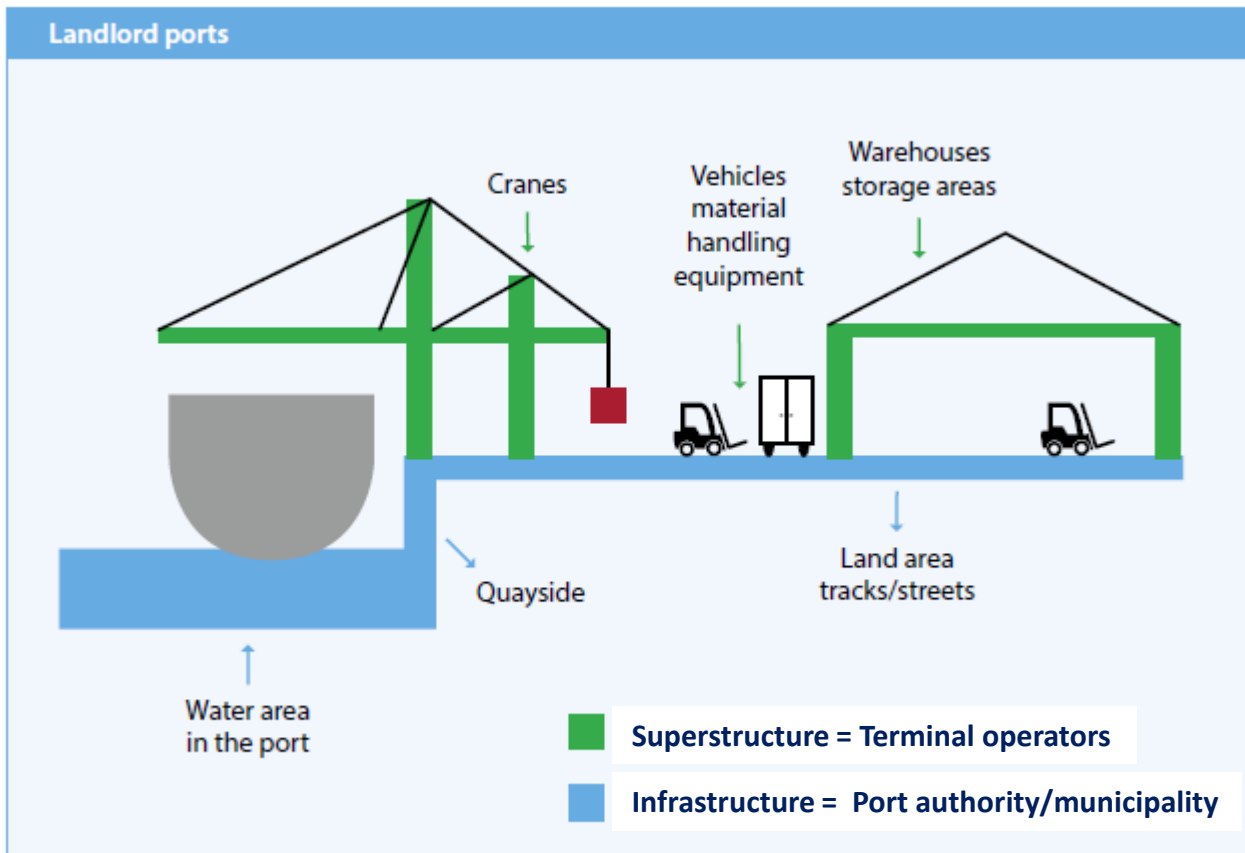
Source: Drewry Global Container Terminal Operators Annual Review and Forecast: Annual Report 2016.
Figures relevant for ten FEPORT Members listed in the chart below.

Top 20 Global Terminal Operators based on throughput represented by FEPORT:

RANKING	OPERATOR	MILLION TEU
1	Hutchison Port Holdings	81.0
2	APM Terminals	69.3
3	PSA International	64.1
5	DP World	60.5
6	Terminal Investment Limited (TIL)	36.2
9	Eurogate	14.0
11	CMA CGM	11.3
14	ICTSI	7.8
15	HHLA	7.5
20	Yildirim/Yilport	4.2

Source: Drewry Global Container Terminal Operators Annual Review and Forecast: Annual Report 2016 and Company annual reports 2015

Terminal Operators are constantly investing



Private or industrial companies rent the infrastructure and invest in own superstructure including buildings (offices, sheds, warehouses, cranes, straddle carriers...etc)

What are the priorities for FEPORT

This year, the International Maritime Organization has decided that 2017 will be

dedicated to raise awareness about the role of ports.

So IMO's moto is : **“Connecting ships, ports and people”**

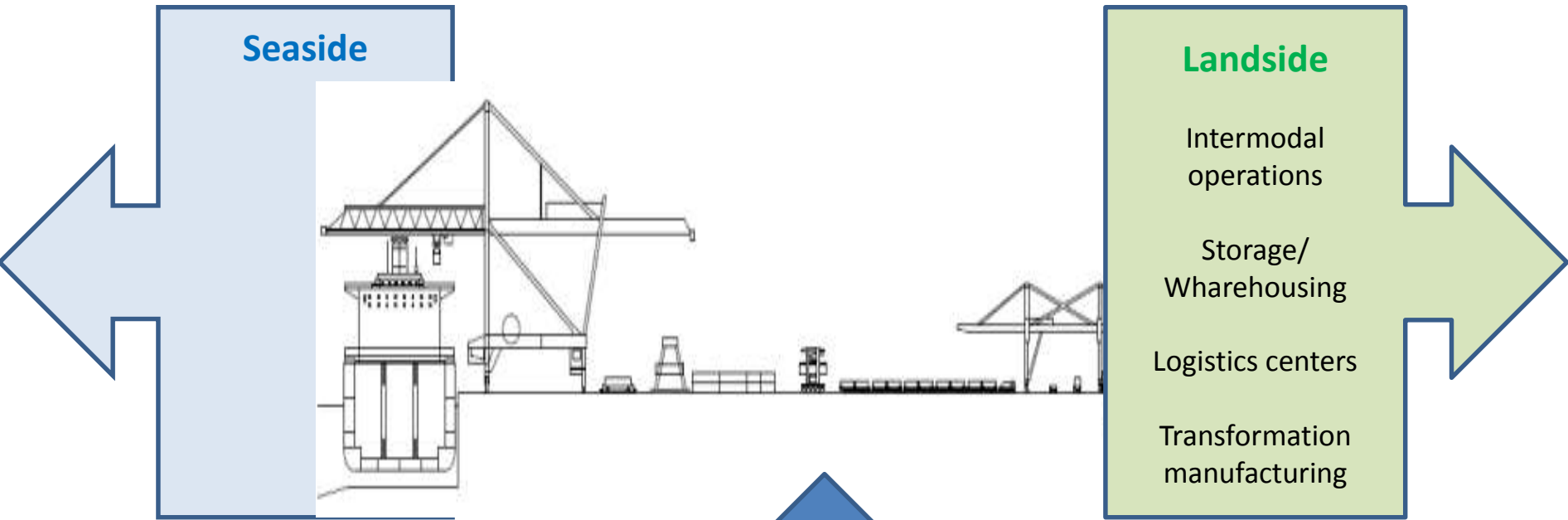
Good news !

At last, we are becoming a little bit more visible and...

more people are getting aware that **94% of the cargo carried by sea..**

is handled by port stakeholders (terminals and port equipment manufacturers)

Optimization concerns all terminal operations



Schematic view of a container terminal
(Meersmans & Dekker, 2001)

Terminal operations		
Seaside operations Peak and low activity ? Infrastructure investment needed? procedures ?	Yard operations Congestion vs overcapacity ? Broadening of the scope of activities	Landside operations Congestion on roads ? simplification of administrative

What is a Sectoral Social Dialogue Committee (SSDC)



“The SSDCs act as a forum for consultation on the drafting of European Union (EU) legislation and policies on employment and social affairs. The committees also constitute an independent framework for social dialogue between the European social partners, particularly for carrying out joint actions and negotiations.” – Europa.eu

Four Social Partners



FEPORT



ESPO – European Seaports
Organisaiton



ETF- European Transport
Workers Federation



IDC – International
Dockworkers Council

Representativeness of Associations (Employers)

- FEPORT represents employers in Belgium, Denmark, Finland, France, Germany, Italy, Netherlands, Portugal, Romania, Spain & Slovenia.
- ESPO represents employers in Bulgaria, Cyprus, Greece, Malta, Sweden & United Kingdom
- *“The representativeness requirement will vary depending on the nature of activities. For example, it will be stricter in the case of a negotiated agreement than for simple consultation.” – Europa.eu*



- Social Dialogue will respect national, regional and company agreements and systems
- No mandate for Commission interference in scope of social dialogue, agenda's, etc.
- Training and Qualifications, Health and Safety and Gender Issues priority issue to be handed – innovation being introduced

Training and Qualifications

Possible creation of European guidelines for the establishment of training requirements – Ensure greater flexibility and performance standards

Health and Safety

Establish existing national health and safety requirements – Work to ensure proper enforcement where high standards exist – Where standards don't exist, raise good practice

Gender Issues

Work to ensure there are no discriminatory recruitment practices in place in European ports

Innovation

Assist and set up the basis for a constructive dialogue between employers and employees to meet the challenges resulting from technological innovation

What are the priorities for FEPOR

European Maritime Year - 2017

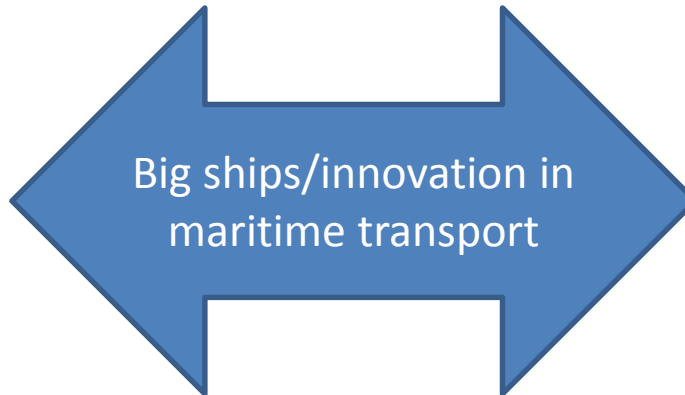
- **Maritime Transport is not exclusively shipping, but must also include all actors in the Maritime Logistics Chain.**
- **Emphasis should be on any measures that improve the efficiency and sustainability of the chain, rather than how we can assist one actor in the chain – i.e. move away from a silo approach to a holistic approach**

Interdependence of the actors of the maritime logistics chain



“Domino effect”

Port terminal
 Innovation, more productivity, Investment, reorganisation (peak and low activity), change management....



Port terminal
 Innovation, more productivity, Investment, reorganisation (peak and low activity), change management....

Industry Alliance for Multimodal IAM

CONNECTIVITY & LOGISTICS for GROWTH

22 organizations join forces to voice their priorities concerning multimodal connectivity and logistics for growth



Industry Alliance for Multimodal IAM

CONNECTIVITY & LOGISTICS for GROWTH

HOW?

- ✓ Work program (taking into account the EU Commission agenda) decided once a year during plenary meeting in Spring and yearly promoted in the framework of TOC Europe in June (2017 in Amsterdam)
- ✓ Topic management through task force (composed of two or three organizations)
- ✓ Interactive work
- ✓ Lobbying in coalition
- ✓ Online collaborative platform : **Dropbox**
- ✓ Deliverables : Joint positions to support industry agenda to politicians and regulators : **next one on digitalization**

Industry Alliance for Multimodal

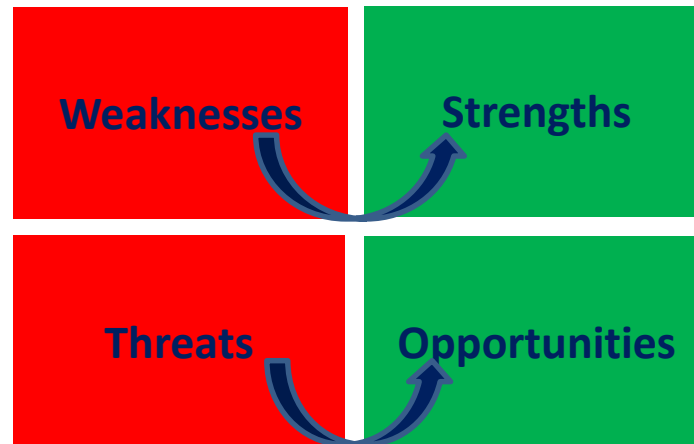
I AM

CONNECTIVITY & LOGISTICS for GROWTH

- **Sustainability:** CO2 emissions/decarbonization, greening
- **Digitalization:** e Manifest Project-Reporting Formalities Directive, Trade facilitation
- **Multimodality and intermodality :** e-CMR, Combined Transport Directive, Connectivity.
- **Technology and innovation :** R&D..



Objective : Seamless, Sustainable and Resilient logistics chains in Europe



Let us convert “**Weaknesses**” and “**Threats**” for the logistics chain into
“**Strengths**” and “**Opportunities**”!

Episode 1: Infrastructure, bottlenecks and IT...

Policy Recommendations

FEPORT policy recommendations set out in recently published “*White Paper: 2017, 2018 and Beyond*”

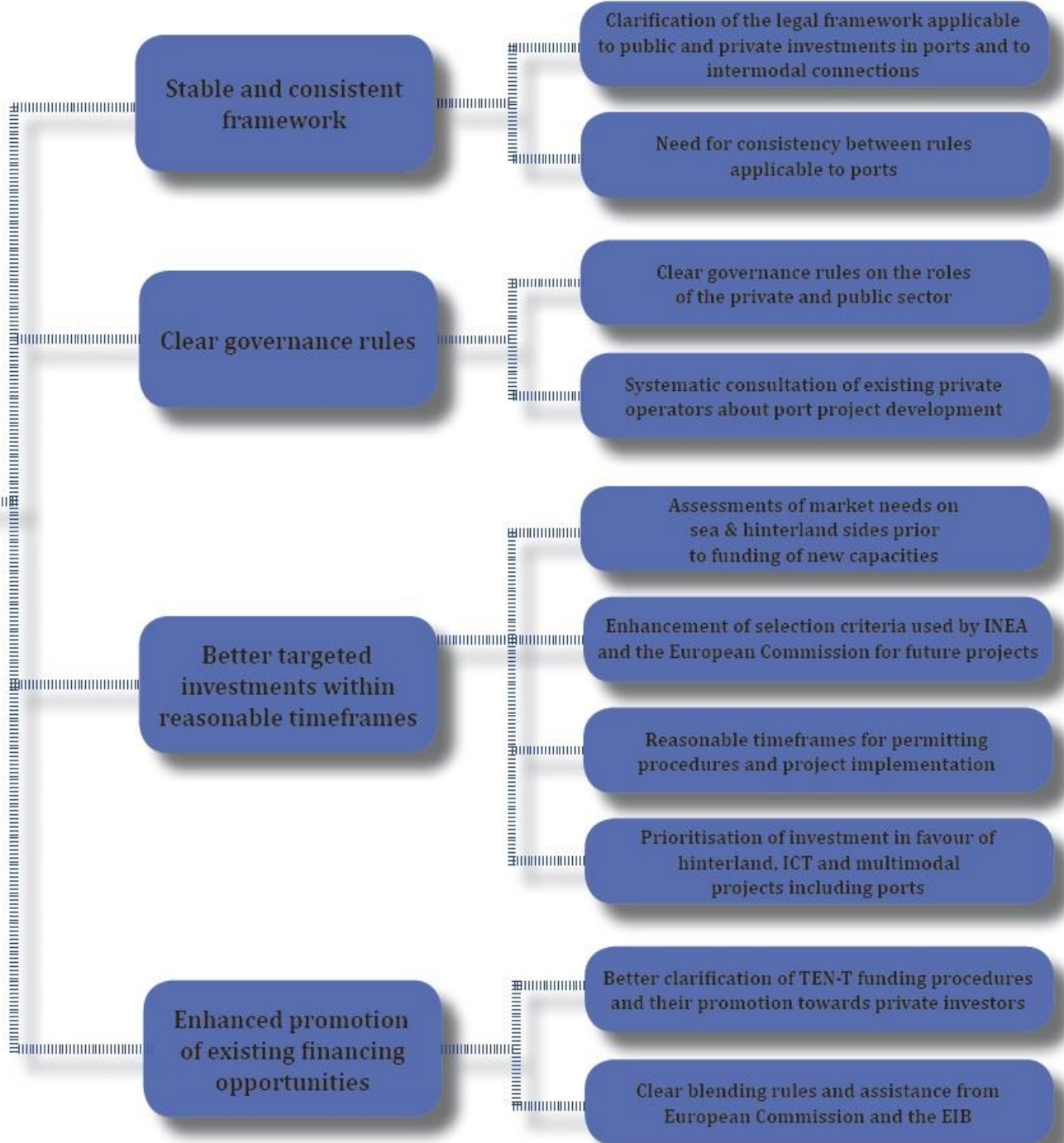
White Paper focuses on three main elements, all of which are relevant to the White Paper on Transport. There are:

- **An enabling framework for private investors**
- **Digitisation and Trade Facilitation**
- **Sustainability and Innovation**





An enabling framework for private investors



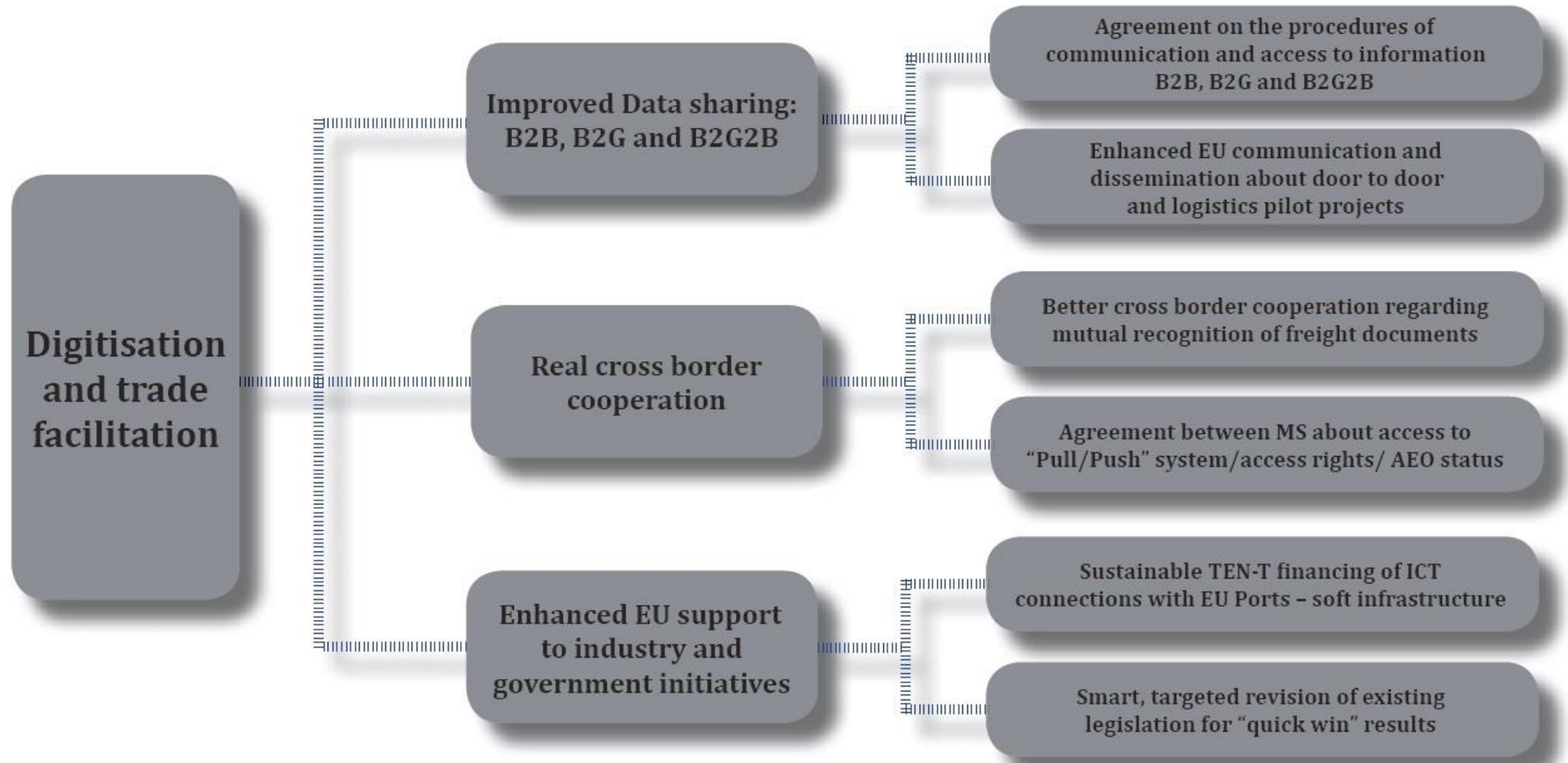
What does that mean ?

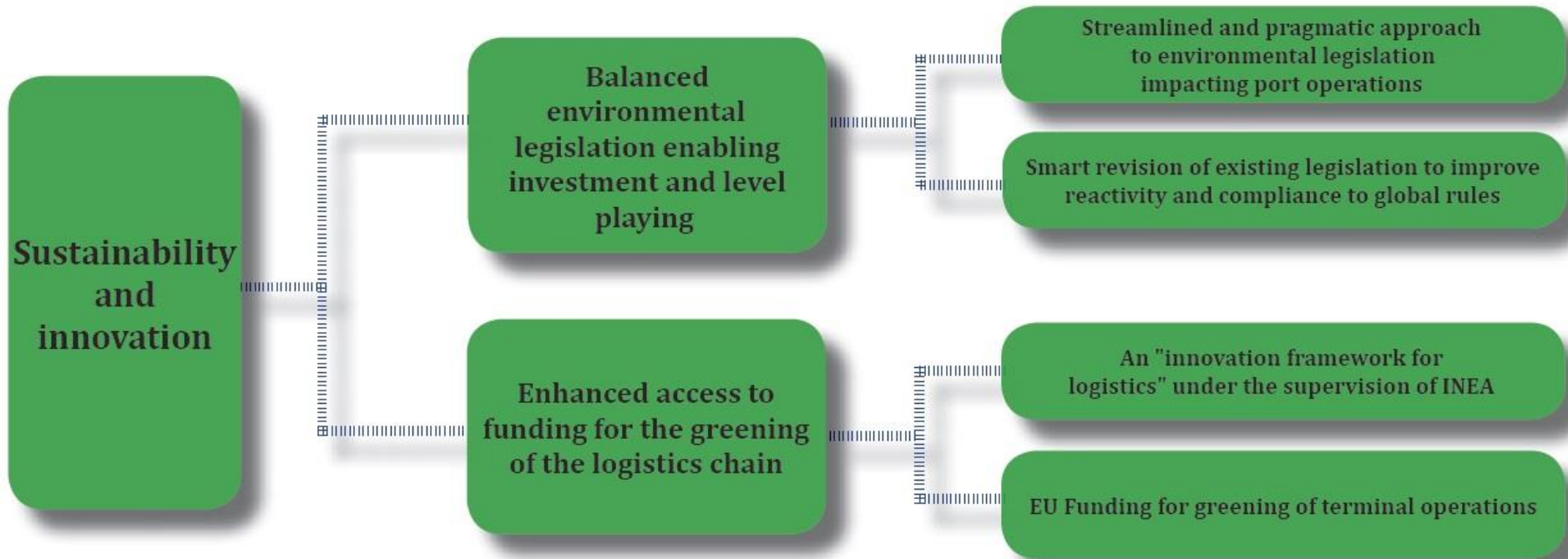
We need national and EU regulators to provide us with :

LEGAL CERTAINTY, VISIBILITY and CONSISTENCY

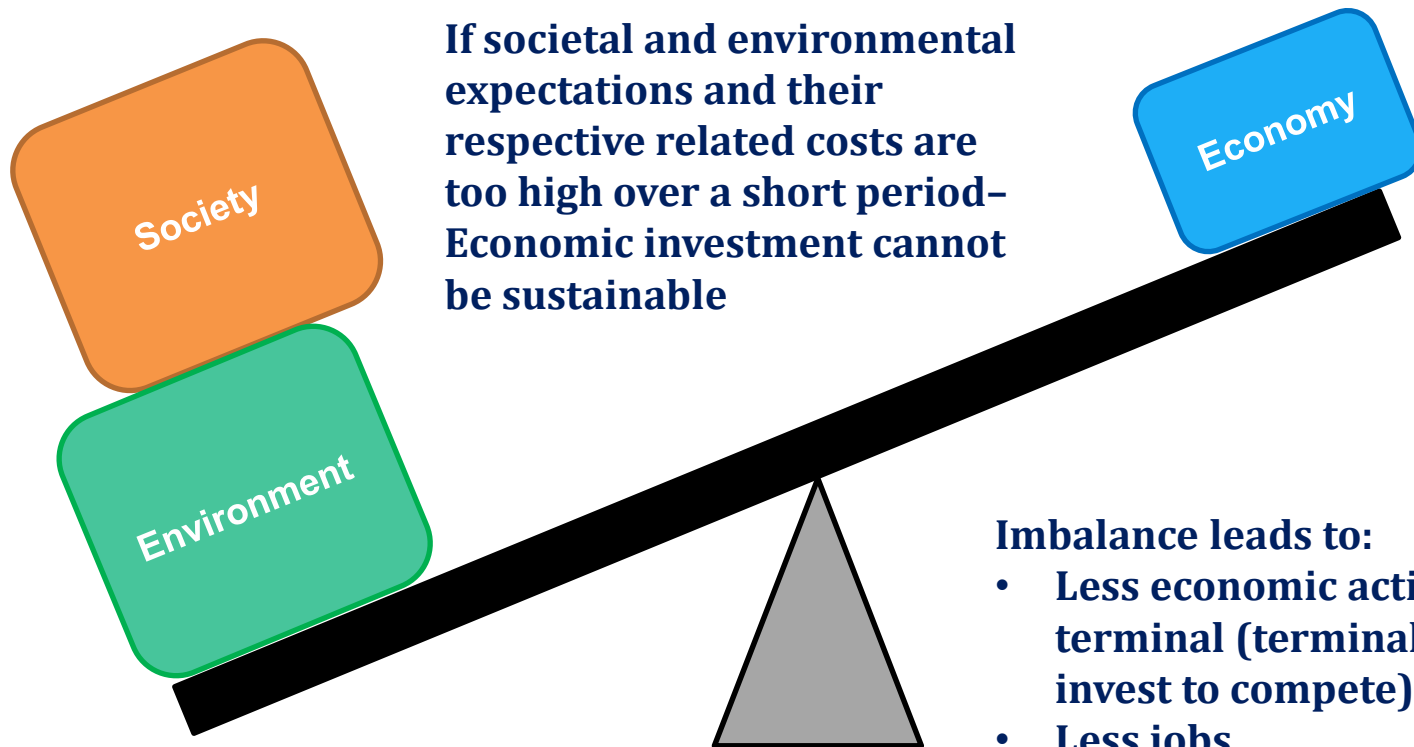
- **Stable and consistent framework regarding concessions**
- **Global harmonized competition rules for the maritime sector**
- **Clear governance rules preventing risks of distortion of competition by publicly subsidized entities**
- **Effective consultation of existing operators prior to new development plans in ports**
- **Efficient ex ante mechanisms preventing the funding of new projects which are not market driven**
- **Enhanced connectivity of ports to the hinterland**

Otherwise we can not invest and handle 94% of the cargo carried by sea





Need for a Balanced Approach



If societal and environmental expectations and their respective related costs are too high over a short period—Economic investment cannot be sustainable

Imbalance leads to:

- Less economic activity in terminal (terminal cannot invest to compete)
- Less jobs
- Less indirect job creation

How to Green Logistics?

Holistic Approach required between all actors. Focus needs to be on greening logistics rather than greening modes



Sustainable Terminals

FEPORT publication on “*Sustainable Terminals: How Private Port Operators and Terminals Invest in Sustainability*” was released during FEPORT General Assembly on June 10th, 2016.

Why a brochure ?

To show that behind sustainable greening efforts, there is an important amount of investment that materializes into concrete results : green equipment, alternative energy production, new driving attitudes etc..

Four main issues addressed:

- **Renewable Energies and Greening of Operations**
- **Energy Efficiency**
- **Terminal Corporate Social Responsibility**
- **Decarbonisation of Port Operations**



Sustainable Terminals

Existing industry methodology (EEEG Guidelines) for calculating carbon emissions

FEPORT has a MoU with GLEC (Global Logistics Emissions Council) to integrate EEGG Guidelines with GLEC Framework for calculating emissions across entire logistics chain

Why is calculation of emissions important?

Give operators real information on their own emissions and allow them to take concrete steps to reduce their emissions

Work is still ongoing. Good progress is being seen





Thank you for you attention