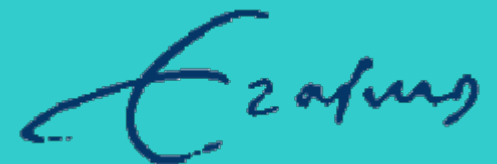




*Ensuring hinterland access;
the role of port authorities*

UNECE Conference Piraeus 2008

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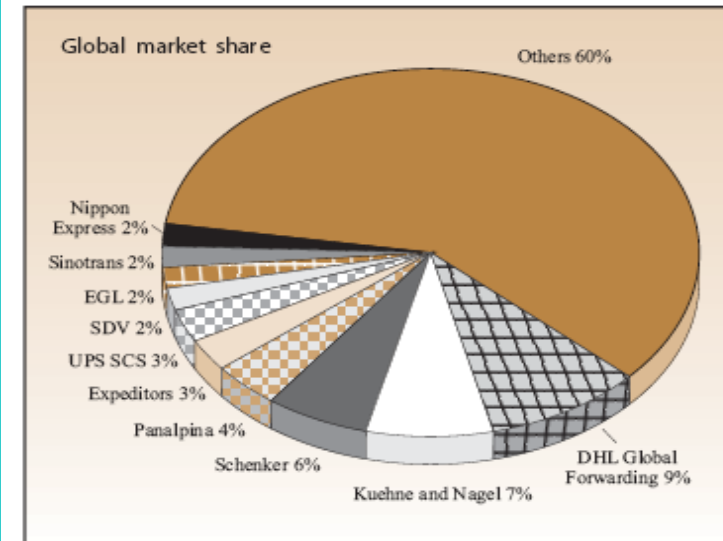




Port authorities operate in an increasingly international market...



Total freight forwarding market: market share



Source: Datamonitor.

Global terminal operators' percentage share of world container throughput (Percentages)

Global terminal operators	2004	2005	2006
HPH	13	13	13
PSA International	9	11	12
APM Terminals	9	10	10
DP World ^a	9	9	10
Cosco Pacific	6	7	7
Eurogate	3	3	3
SSA Marine	3	3	3
Total share of world throughput	53	56	57
World throughput (in millions of TEUs)	356.6	387.7	440.0

Source: Adapted by the UNCTAD secretariat from information obtained by Dynamar B.V.

^a DP World includes CSX World Terminals and P&O Ports for all three years.

Europe-Far East trade: percentage slot capacity share by line/grouping²⁶ (Percentage share)

Operator	Mid-2005	Mid-2006
Maersk Sealand	12.5	21.4
Grand Alliance	22.2	14.5
New World Alliance	10.7	12.9
K Line and Yang Ming	6.8	5.8
CMA CGM/Norasia and others	9.7	5.7
CSAV NORASIA	1.2	2.2
Total	63.1	62.5



competitive factor between ports...

- ⇒ In general hinterland costs are a large part of door-to-door costs
- ⇒ Capacity bottlenecks and congestion
- ⇒ Opportunities to improve chain efficiency through better coordination
- ⇒ And a need for action given expected growth

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economic & environmental returns to scale...

⇒ Economic

- ❖ Critical mass for direct shuttle trains/ larger & more frequent barges
- ❖ Less public expenses on infrastructure (port & hinterland)
- ❖ Lower transport costs for port users

⇒ Environmental

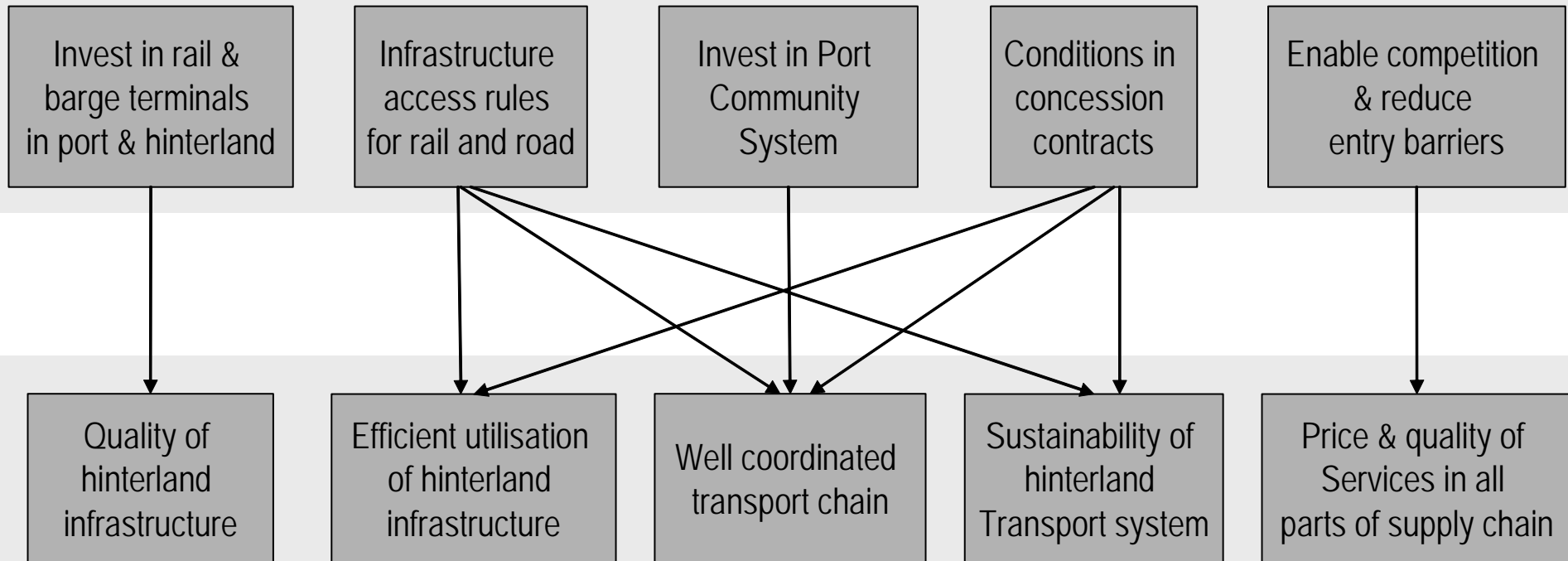
- ❖ Favourable modal split
- ❖ Larger trains/barges
- ❖ Sufficient scale for innovations to improve environmental performance.

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Focus of this presentation: Possible roles for PAs

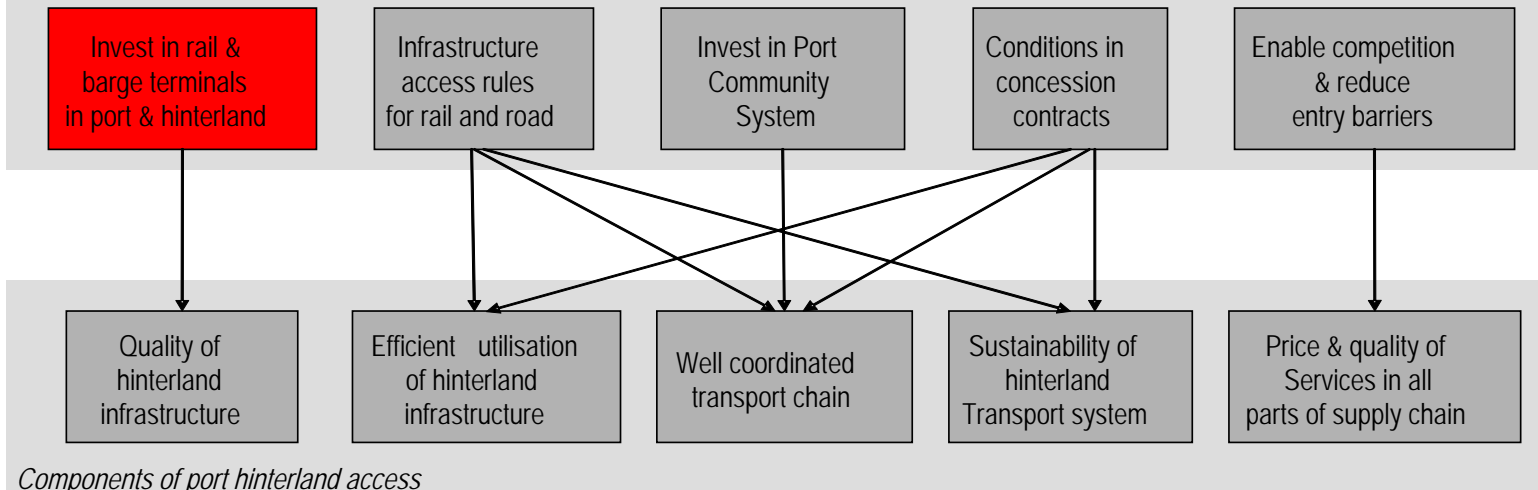
Possible role of PA



Components of port hinterland access



Possible role of PA

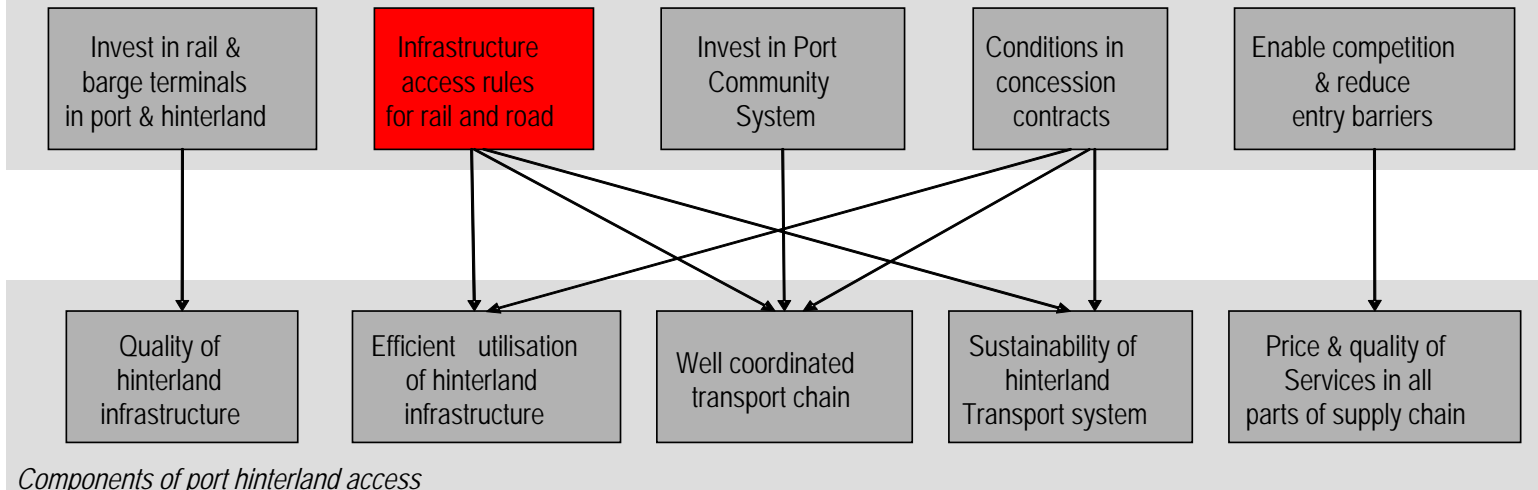


- PA has planning initiative in port
- Forward looking planning & investments required
- Beyond traditional port area, ports may invest in terminal capacity as well.
- Planning initiative for inland terminals? For terminals with captive cargo, either large shippers or regional agencies. For ‘transferium’ type inland terminals: unclear.
PAs may need to play a role here.

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Possible role of PA



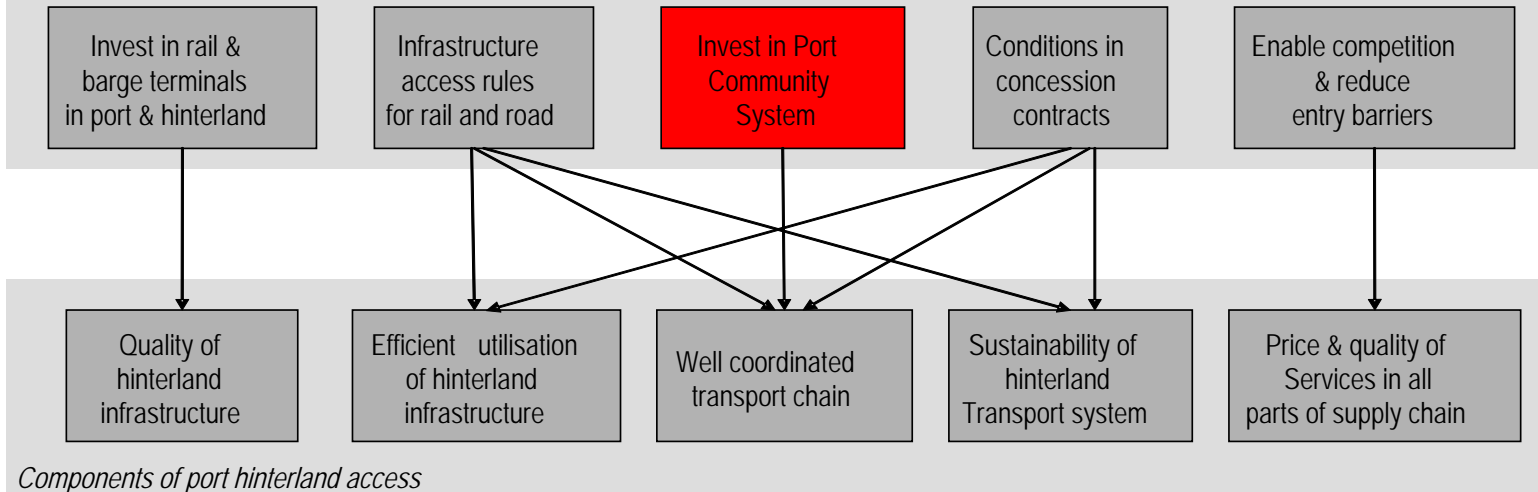
Components of port hinterland access

- Infrastructure access rules can improve utilisation, coordination in transport chains and sustainability
 - Only allow clean trucks
 - Allocate slots (e.g. rail)
 - Link infrastructure access to terminal handling slots
- PA not by definition in well positioned to develop infra access rules, but may play a role.

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Possible role of PA

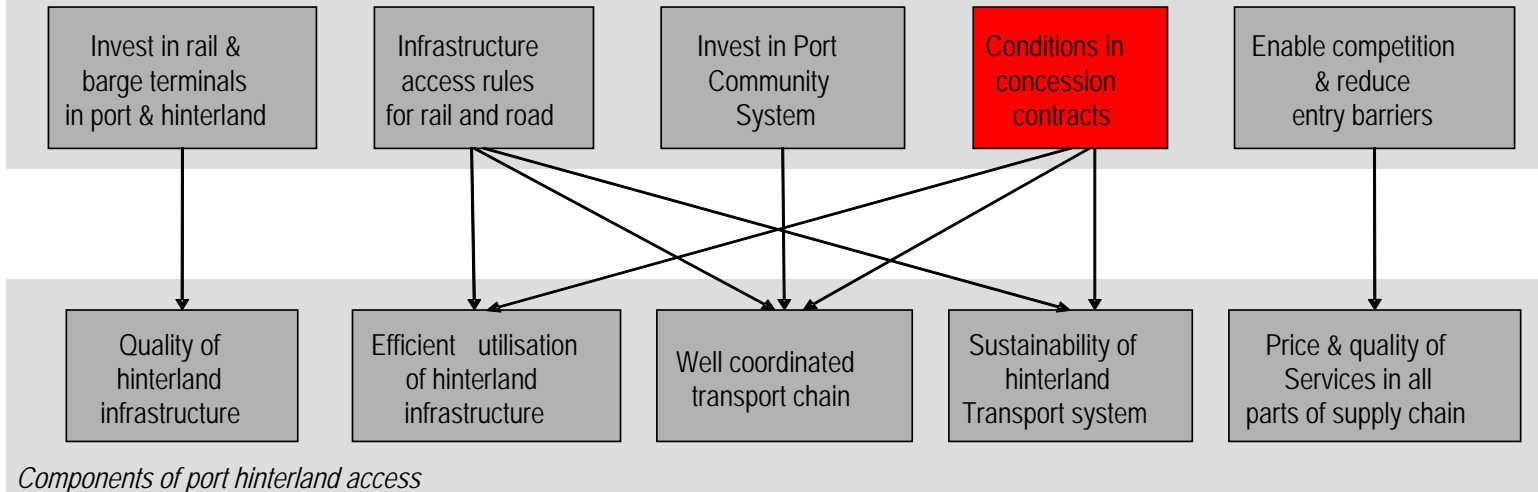


- Port community system is crucial to ensure data exchange in port
- Connections with customs & inspections
- Investments in PCS are a collective action problem
- Role for PA to jointly invest in PCS

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Possible role of PA

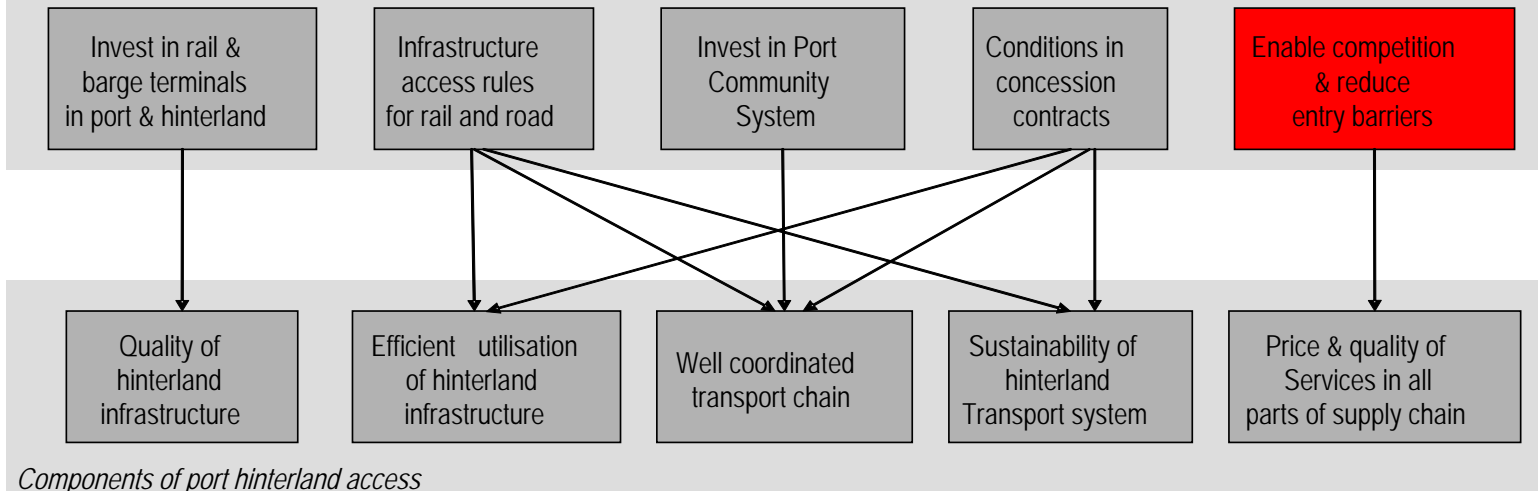


- Setting conditions in concession contracts can contribute to sustainability, coordination in transport chains, and efficient use of infrastructure:
 - Modal split guarantees
 - Use of Port Community System
 - Service level agreements
 - Opening hours/peak shaving

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Possible role of PA



- Securing competition will contribute to price & quality of services
- Competition may for the PA not always be attractive from profit maximisation perspective
- PAs may be able to reduce entry barriers
 - Regulatory entry barriers (e.g. rail market)
 - Lack of suitable locations
 - Investments in fixed assets

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Thank you for your attention

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