

Session 4: EU POLICY the shippers' view

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Short Sea Conference 2011
13 April Bilbao

European Shippers' Council

- users of freight transport services
- more than 100,000 companies throughout Europe
- majority of the volume of goods shipped by sea from/to Europe
- national transport user organisations/ shippers' councils & corporate membership/commodity organisations (paper/steel/chemical industry)

Optimising all the modes

- Improving the **quality** of transport
- **Liberalisation** and deregulation of transport markets
- Focus on **effective use** of taxes and charges
- Focus on **efficient supply chains**

How Flexibility in Port Operations can trigger a modal shift? Role of shipper

White Paper Maritime Strategy I
Window e-Maritime Short Sea >
inefficiencies and v

Reduce waste (fu
at minimum

Commission Europ
CLIMA customs G
Potočnik sanction
passenger shippin
pilotage Drive out inefficiencies

dredging ecsa Belgium UK siim kallas France Reduc

European Council **transpo**
liability **Ma**

shipping **T**
dredging **ecsa** **Belgium** **UK** **siim kallas**

France **Reduce waste (fuel)**
TEN-T network Performance indicators DG COMP state-aid guidelines
White Paper Maritime Strategy I LOW CARBON SOCIETY good for the



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Marco Polo sulurophur container shipping TRAN
siim kallas France

efficiencies

provider European
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MOVE service provider European Commission

S and ICT
container

and waste
siim kallas

Modal Shift e-maritime
TEN-T network Performance indicators DG COMP state-aid guidelines
White Paper Maritime Strategy I LOW CARBON SOCIETY good for the

Agenda

- The challenges in freight transport
- ESC position on EU policy on modal shift
- What triggers modal shift
- What are the threats/weaknesses and the strengths/opportunities for shippers?

2050

Future of freight
 80% economic, 20%
 20% social, 80%
 20% environmental, 80%

TRANSPORT LINK

- MANUFACTURES
- NOT MOVING SO MUCH
- MORE QUIT TO HOME
- MORE TRANSPORT SERVICES
- MORE TRANSPORT SERVICES
- MORE TRANSPORT SERVICES

RAIL CHANGES
 (FOR 2 RAILWAYS)
 NO DISTANCE?

- TRANSFORM LINE
- RAIL NETWORK
- RAILWAY OPERATIONS
- RAILWAY OPERATIONS
- RAILWAY OPERATIONS
- RAILWAY OPERATIONS

Future View

- LONGER HOURS

CO₂ EMISSIONS
 TRANSPORT

LESS CO₂
 TRANSPORT

INDUSTRIES

- MANUFACTURE
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MEGA CITIES

- MEGA CITIES

URBANIZATION

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SOCIETY

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TECHNOLOGY

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EU Policy: Shift to other modes

EC PRESS RELEASE 28/3/2011

- **By 2030, 30% of road freight over 300 km should shift to other modes such as rail or waterborne transport, and more than 50% by 2050.**
- Deliver a fully functional and **EU-wide core network of transport corridors**, ensuring facilities for efficient transfer between transport modes (TEN-T core network) by 2030,
- By 2050, connect all core network airports to the rail network, preferably high-speed; ensure that all core seaports are sufficiently connected to the rail freight and, where possible, inland waterway system.

EU Policy – challenges for short sea shipping

- European maritime transport space without barriers
- Fair competition in port services
- Hinterland connection
- Green corridors
- e-maritime:
- TEN-T – Marco Polo

ESC position: Shift to other modes

ESC recognises these to be aspirations, achievable **only if other alternatives become viable economically and practical**, then we can support the aspiration. But there is a long way to go on this.

We will never support any attempt to **force** a modal shift.

ESC position on shift to other modes

Sustainable transport and competitiveness equate to the same thing: more efficient transport and lower emissions.

Ways to increase efficiency in freight transport whilst reducing costs to the industry and the environment.

- 1st Rail way package becoming effective
- cabotage
- integration of IT systems for short sea shipping through introduction of the so-called “Blue Belt” initiative
- investments in new technology



Call on Rail Freight to Improve

- rail freight is an important part – but just one part – of a logistics solution
- INTERMODAL services and block trains work well but SINGLE WAGON IS PROBLEM AREA
- rail freight will improve efficiency, reliability and service performance with greater competition from new entrants and from other modes

What triggers Modal shift

- Location of producton
- Reliability
- Price
- Environmental performance



- Broad range of decarbonisation measures and incentives used by shippers
- Carbon intensity will become a major criterion in the selection of logistics service providers (**‘green tender’**) I
- Minimum demands for environmental performance of carrier
- Different tools to evaluate and compare performance

Matching the trends

- Greater collaboration/bringing volumes together
- Increasing the visibility of purchases and stock
- Measuring the performance
- Measuring the footprint

Flexibility...in port operations

- logistics-integrated e-freight solutions
- Connecting hinterland infrastructure

BUT EQUALLY IMPORTANT

- **Greater visibility/transparency** of operational costs (as a percentage of total) and what drives them
- Measuring the **performance**
-

The realities

- frequency – what is sufficient?
- Capacity of containers
- Lead-times?
- Good environmental solution
- Price dis-advantage in some flows

Thank you!

