

THE FORUM OF THE CHAMBERS OF COMMERCE
OF THE ADRIATIC AND IONIAN AREA
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1. MARITIME TRAFIC AND ADRIATIC AND IONIAN PORTS

During the year 2004 the Observatory of the port of Ancona set up an initial survey of traffic data relative to the principal ports that appear on the Adriatic and Ionian basin.¹

In the Adriatic area, in a strict sense of the word, the overall transportation of goods amounted to roughly 160 million tons in 2003, of which almost half this figure regarded the transportation of liquid cargo bulk.

Almost two thirds of the goods (total and containerised) regard transportation relative to the Northern Adriatic (Trieste, Venice, Koper, Rijeka). This data is furthermore reinforced if the Chioggia and Monfalcone are included in the survey.

Within this narrow area container transportation amounted to 990,000 teus in 2003, with a growth rate of 6% in the last year. If the area of observation is enlarged to include the Ionian, the data from Taranto², recently part of the competitive transshipment port scene and growing rapidly, is added. In 2002 - the last official data available - Taranto had a transit of 420,000 teus.

On the whole, movement in the other ports is rather of the *feeder* type towards the *hub* ports of Taranto, Gioia Tauro and Malta.

The extended Adriatic-Ionian basin is furthermore characterised by the elevated volumes in passenger traffic, in which the central and southern ports have a stronger competitive position.

- more than 9 million international passengers registered in these ports in 2003. The absolute leader being Ancona with almost one and a half million. National movement is also considerable, particularly in Croatia (almost 5 million) and in Greece, given the busy connections between the various internal ports and the islands.
- Over 50% of the International passenger movement regards the Greece – Italy route. Ancona is the undisputable leader with 40% of the market share.

¹ The ports subject to the survey are: Trieste, Venice, Ravenna, Ancona, Bari, Brindisi and Taranto in Italy; Koper in Slovenia; Rijeka, Split, Zadar, Ploce and Dubrovnik in Croatia; Durazzo in Albania; Bar in Serbia-Montenegro; Igoumenitsa and Patras in Greece. The survey is still in course, but nonetheless it is already possible to delineate an outline of the traffic characteristics in the area, in spite of the dishomogeneity of some of the information collected and the lack of response on the part of some of the harbour authorities (Igoumenitsa and Durazzo). Some of the unavailable data was substituted by estimates on the basis of existing data.

² Taranto, has been kept separate from the total handling for the moment due to the lack of updated information regarding 2003. Being a very recently developed port, the growth rate has oscillated drastically in recent years and it would be preferable to not effect an estimate for 2003.

- Ancona is also leader in the traffic to Croatia, while Bari and Brindisi are for links to Albania and Serbia-Montenegro.
- In terms of growth, the Croatian ports have registered the most significant performance in recent years (+ 14% in 2003, +13% in 2002) versus the most contained performance in the Italian ports (+4% in 2003, + 2% in 2002)
- There has also been strong development in cruise traffic, which sees Dubrovnik as a significant stage for cruises in the Eastern Mediterranean.

Short sea shipping traffic in the Adriatic and Ionian ports, in particular regarding the connections to Greece, has already been a reality for some time. The ferries transport not only passengers, but also trucks charged with goods predominantly destined for Central Northern Europe.

In 2002, an estimated 50% of the import/export of Greece towards other European Union countries passed through the Adriatic. The main beneficiaries of this traffic are the citizens of Central North and South Eastern Europe. The relevant economic advantages, on a local scale, are very low in comparison to the management and pollution costs, which this type of traffic often entails.

The characteristics of the traffic of these ports and the elevated ferrying vocation (steadily increasing over recent years) on the other hand demands for targeted services and infrastructure requirements (dedicated docks, parking areas, dedicated access etc...), and the development of links to the main arterial motorways.

In what follows we will illustrate how the new European orientation in respect of transport could offer the occasion to confront these necessities in an adequate manner.

2. THE EUROPEAN TRANSPORT POLICY AND THE ADRIATIC AND IONIAN AREA

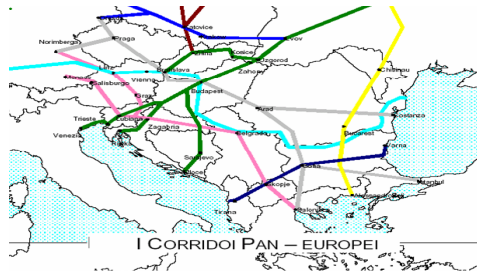
In terms of the transportation policy, the European Union has been moving in a twofold direction, since the eighties: on the one hand, support for the infrastructure policy aimed at completing or improving the connection network between the Member Countries, and on the other hand the objective for progressive integration with the countries of Central Eastern Europe.

Within this outline, in 1994, at Essen, the European Council defined 14 projects of priority, for an investment equal to 300 billion Ecu to be realised by 2010. During subsequent years some of these projects were abandoned whereas others were added. As at 2003, only 25% of the works envisaged by Essen were realised.

Beside the Essen priorities, during the nineties a program for the Main Corridors was defined. The idea of trans-European transport corridors was born with the fall of the Berlin wall, and has the ultimate objective of creating a wide area of geo-economic and geo-political influence. During the conferences of Prague (1991), Crete (1994) and Helsinki (1997) 10 principal Trans-European Transport Network corridors were identified. In practise these extend the continental corridors and include important peripheral European areas.

CORRIDORS OF THE AREA

ADRIATIC CORRIDOR



PAN-EUROPEAN CORRIDORS

In the Adriatic and Ionian area, three corridors have a direct influence:

- Corridor 5: develops along the principal East-West directrix, linking Barcelona (Spain) and Kiev (Ukraine). The part of interest to the Northern Adriatic has three axis:
 - Principal axis, Venice – Trieste/Koper – Ljubljana – Budapest;
 - Axis B, Rijeka – Zagreb – Budapest
 - Axis C, Ploce – Sarajevo – Osijek – Budapest. The definition of this ultimate axis followed the Dayton agreement and the desire to consent further integration of Bosnia-Herzegovina.
- Corridor 8: develops from Durazzo in Albania to Sofia and Varna on the Black Sea and links the ports of Bari and Brindisi by sea.
- Corridor 10: The last of the Pan European corridors (added at Helsinki in 1997), has its story bound with the events of Ex-Yugoslavia. Foresees a link between Austria and Greece, passing through the territories of Ex-Yugoslavia. Notwithstanding the aforesaid, for the moment the resources committed, do not amount to much, mainly due to instability in many of the countries through which the corridor would pass.

The Adriatic Corridor project, for which the Community financed feasibility studies in 1995, was placed alongside the aforesaid principal corridors. This project deals with a multimode axis through the Eastern Italian regions directly linking them to the principal corridors in the North and to corridor 8 in the South.

The recent Community guideline developments. A vast process of redefining Community guidelines is currently underway, one of the objectives being to increase economic and political integration between the European Union and the Eastern countries.

The extension of the European network to the future Member States will contribute in all to the success of the expansion and will constitute a new opportunity to reduce congestion on the main axis and encourage intermodal transport in an enlarged Europe, a condition necessary for sustainable transport development.

In 2001 the Commission had already elaborated a readjustment in the intervention priority, adding another six initiatives to the Essen projects, when a top group, presided over by Karl Van Miert, ex vice-president of the Commission, received a mandate to revise the list of priorities in light of the forthcoming enlargement.

The indications of the group, which examined over 100 projects, were presented to the Commission in June 2003. The majority of the indications on the new list of priority projects were acknowledged by the Commission (October 2003). Among the decisions taken, and above all, was the proposal for a new list of **29 priority projects** to be completed by 2020.

Among the innovations of Van Miert's Report, accepted by the Commission, is the possibility of raising European financing from 10% to 30% in order to avoid the obstacles which occurred in the 1994 Essen projects.

Of the 29 priority projects, the Adriatic and Ionian area is directly interested by:

- Project 6: Railway axis Lyon – Trieste / Koper – Ljubljana – Budapest – border of Ukrain on lines
 - Venice – Trieste / Koper – Divaga (time horizon 2015)
 - Ljubljana – Budapest (2019)
- Project 7: Motorway Igomenitsa / Patras – Athens – Sofia – Budapest which will extend the Via Egnatia and Pathe motorway projects (completion of which is forecast for 2008) with expansion of the motorway line towards Bulgaria and Romania (time horizon 2010)
- Project 21: Motorway of the Sea of South Eastern Europe which links the Adriatic Sea to the Ionian Sea and to the eastern Mediterranean up to and including Cypress. (Time horizon 2010)
- Project 29: Adriatic – Ionic railway axis in Greek territory (Kozani – Kalambaka – Igoumenitsa – Ioannina – Antirrio – Rio – kalamata) (time Horizon 2012-2014)

Certain amendments were made in February 2004; other will presumably be affected before the definitive announcement by the Council and Parliament. Some of these are of interest to the Adriatic–Ionian Basin:

- the reappearance of corridor viii with links between Bari and Durazzo and therefore the Black Sea.
- The “Ronchi Sud- Trieste Divago” interchange needed to relieve the junctions on the trans-border section between Italy and Slovenia.

The Adriatic Corridor has however disappeared from the priority list. The Western regions of the dorsal of the Adriatic-Ionian basin remain completely bare.

However an amendment was passed consenting the extension of European financing to certain railway lines which are sustaining tributaries to the corridors (although not inserted in the corridors); a part of the project could therefore be recuperated.

The project relative to the Motorway of the Sea. This is a project of particular interest to the Adriatic and Ionian ports. There are four motorway identified by the Commission:

- Motorway of the Baltic Sea (linking the Member States of the Baltic Sea with the central and Western Member States);
- Motorway of the Western European Sea (from the Iberian peninsula right up to the North Sea and to the Irish Sea via the Atlantic Arc);
- Motorway of the South Eastern European Sea (linking the Adriatic to the Ionian Sea and the Eastern Mediterranean right up to Cypress);

- Motorway of the South Western European Sea (Western Mediterranean) linking Spain, France, Italy, and Malta, as well as the Motorway of the South Eastern European Sea.

The Van Miert group report suggested some measures in order to stimulate the development of these lines:

- Concentration of the majority of freight transport through some maritime itineraries departing from a limited number of ports in order to increase the line profitability;
- simplification of customs controls;
- Set-up of an electronic declaration system for port authorities;
- reserved port installations favouring these activities (ro-ro terminals, logistic equipment, parking areas, trucker installations) and direct access to the ports;
- guaranteed navigability all year round.

In practice the incentives should subsidise the aforementioned accompanying measures, including the granting of aid for the set-up of new services. The projects have to be presented by two Member States; those in agreement have to provide for tender procedures for the grant of state funds for packages including access infrastructures, port infrastructures, electronic management systems or aids to those services which could improve the profitability of the lines.

3 CONCLUSIONS

For territories (and ports) on the Northern Adriatic, Southern Adriatic and Ionian Sea, the recent evolution in the Community orientation, will certainly constitute a unique opportunity for strengthening the infrastructure and thus development.

Nevertheless the central part of the basin, both on the Western coast (Italy) as well as the Eastern coast (Croatia and Bosnia-Herzegovina) remain substantially uncovered in terms of large infrastructure interventions. The Adriatic corridor having disappeared from the list of priority projects. The Tyrrhenian dorsal up to the strait of Messina has in fact been privileged by choices relative to transport infrastructure facilities.

If the final announcements by the Council and Parliament do not substantially modify this scenario, the Motorways of the Sea will be the only development occasion for the central Adriatic. The Adriatic ports - and among these Ancona in particular - have shown an undisputable capacity to offer short and medium range traffic services. Nonetheless it is necessary to confront the various problems: the local traffic congestion; insufficient links between the port and the road and rail routes; the want of parking areas for articulated trucks; the confusing muddle of procedures, etc....

As such, it is necessary to promote a joint action in the most appropriate centre until at least the Motorways of the Sea enable the re-equilibration of resources committed to trans-European transport in favour of the central area of the Adriatic-Ionian basin.