



FORUM

delle Camere di Commercio dell'Adriatico e dello Ionio
of the Chambers of Commerce of the Adriatic and Ionian Area



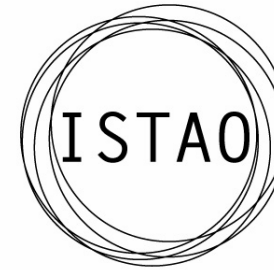
ISTITUTO
ADRIANO OLIVETTI
DI STUDI PER
LA GESTIONE
DELL'ECONOMIA
E DELLE AZIENDE

ADRIATIC AND IONIAN PORTS: Maritime traffic in 2008, and european policies

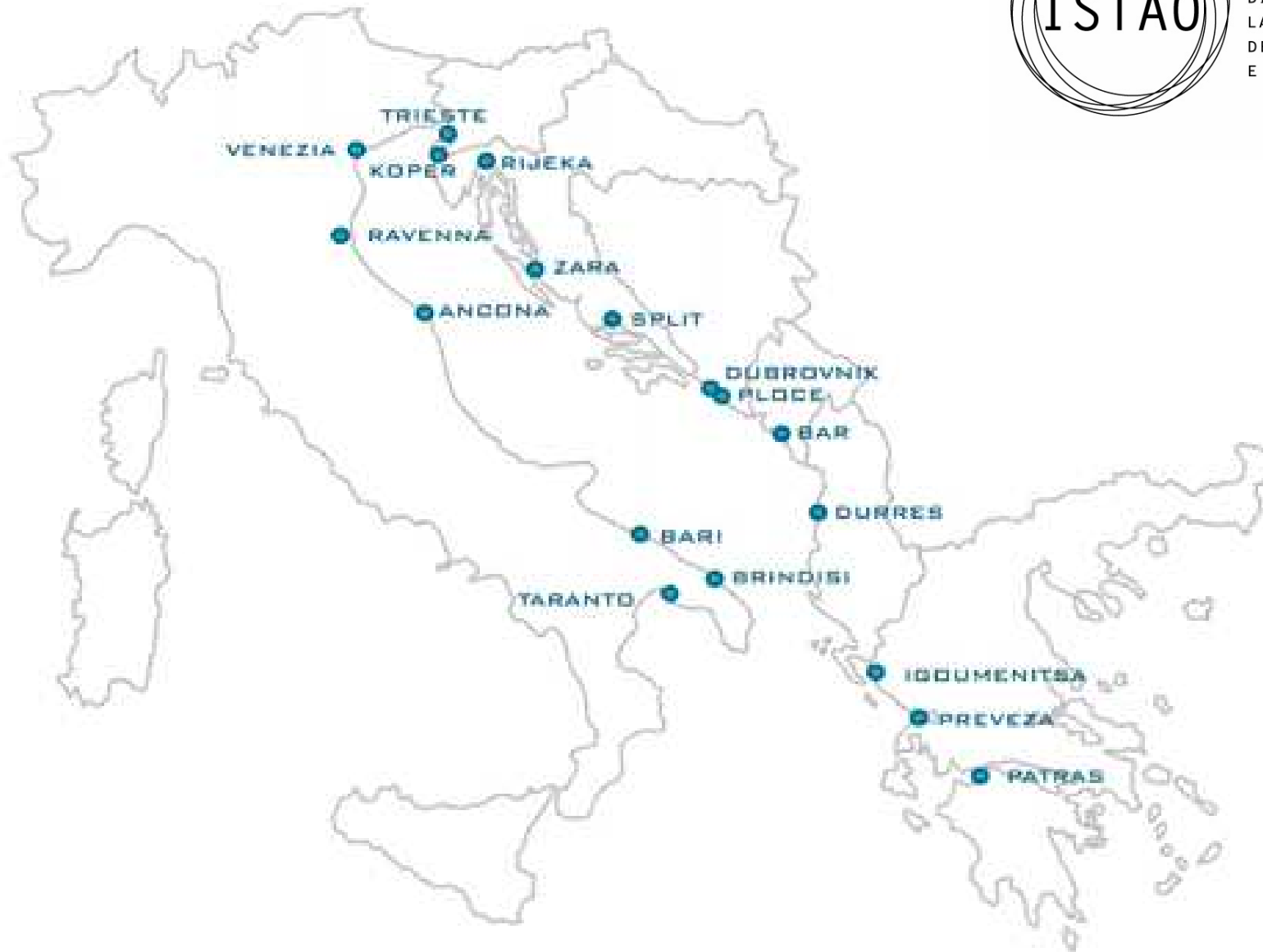
Ida Simonella

Agrinio, 29 april 2009

www.istao.it

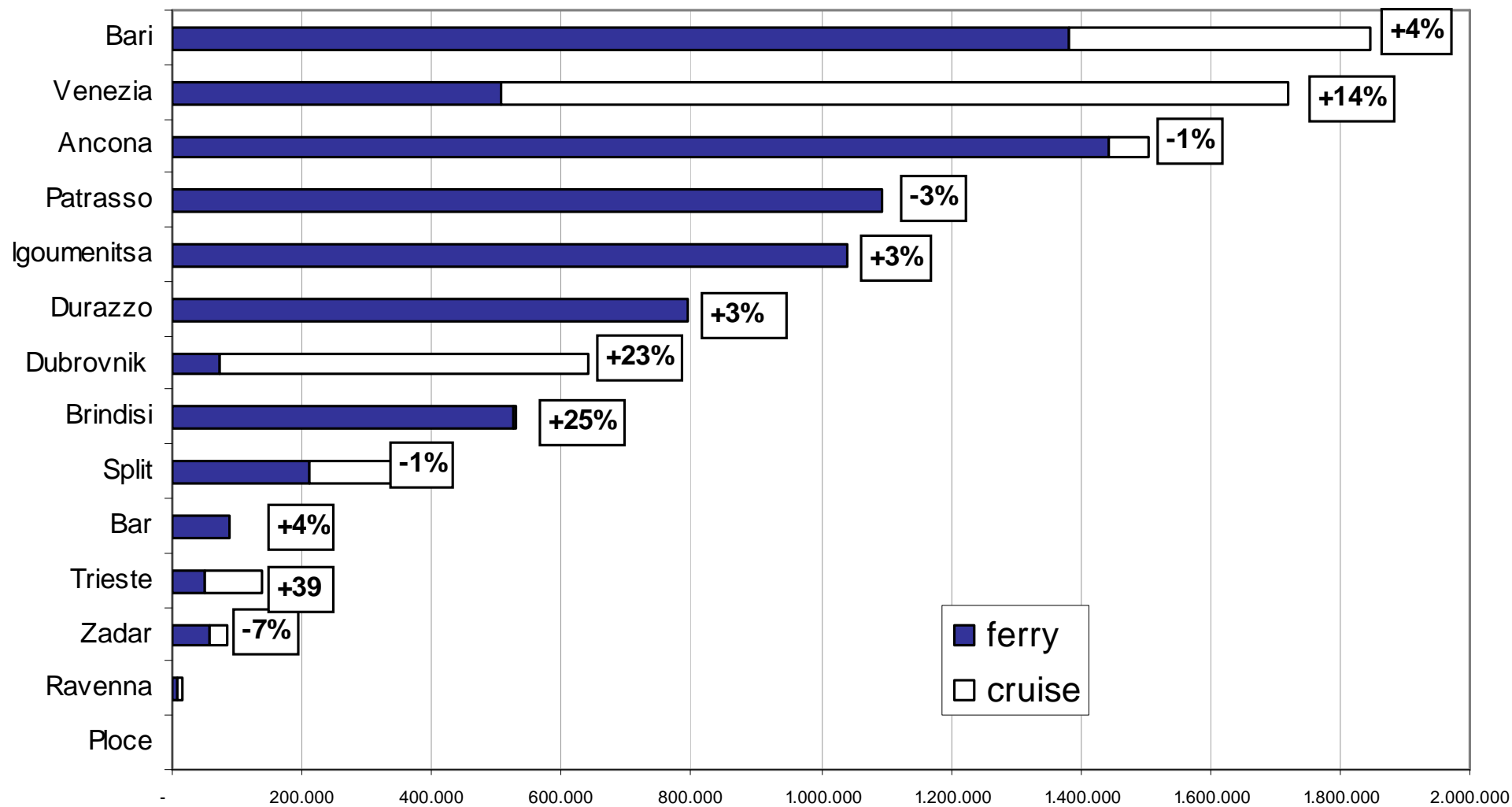


ISTITUTO
ADRIANO OLIVETTI
DI STUDI PER
LA GESTIONE
DELL'ECONOMIA
E DELLE AZIENDE



- **TRAFFIC AND TRENDS**
- **PORTS AND ECONOMIC CRISIS**
- **EUROPEAN POLICIES**

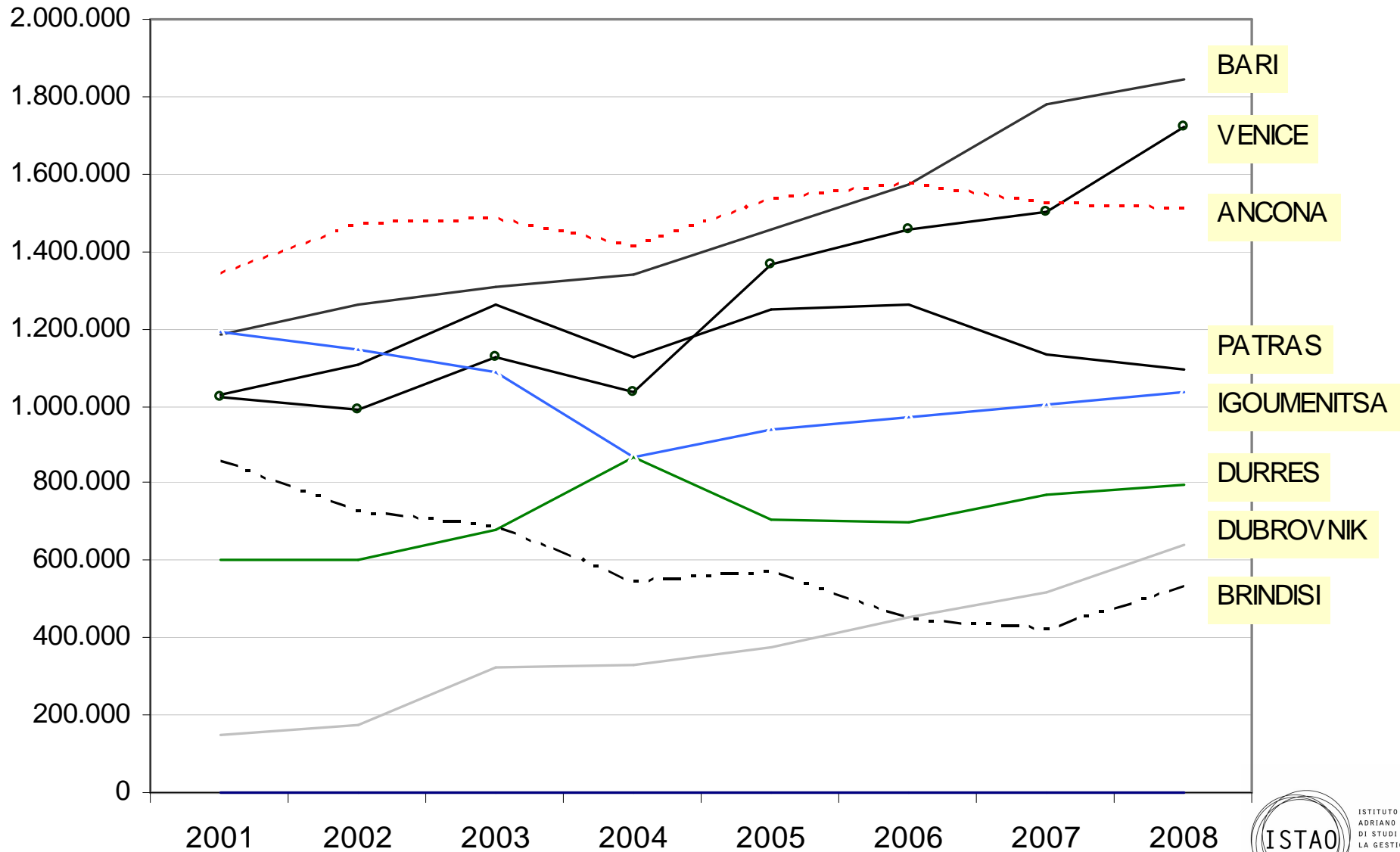
A-I PORTS: INTERNATIONAL PASSENGER MOVEMENTS 2008



Fonte: elaborazioni Istaot OTM su dati AP

A-I PORTS: TRENDS

INTERNATIONAL PASSENGERS MOVEMENTS. TREND 2001- 2007



Fonte: elaborazioni Istaot OTM su dati AP

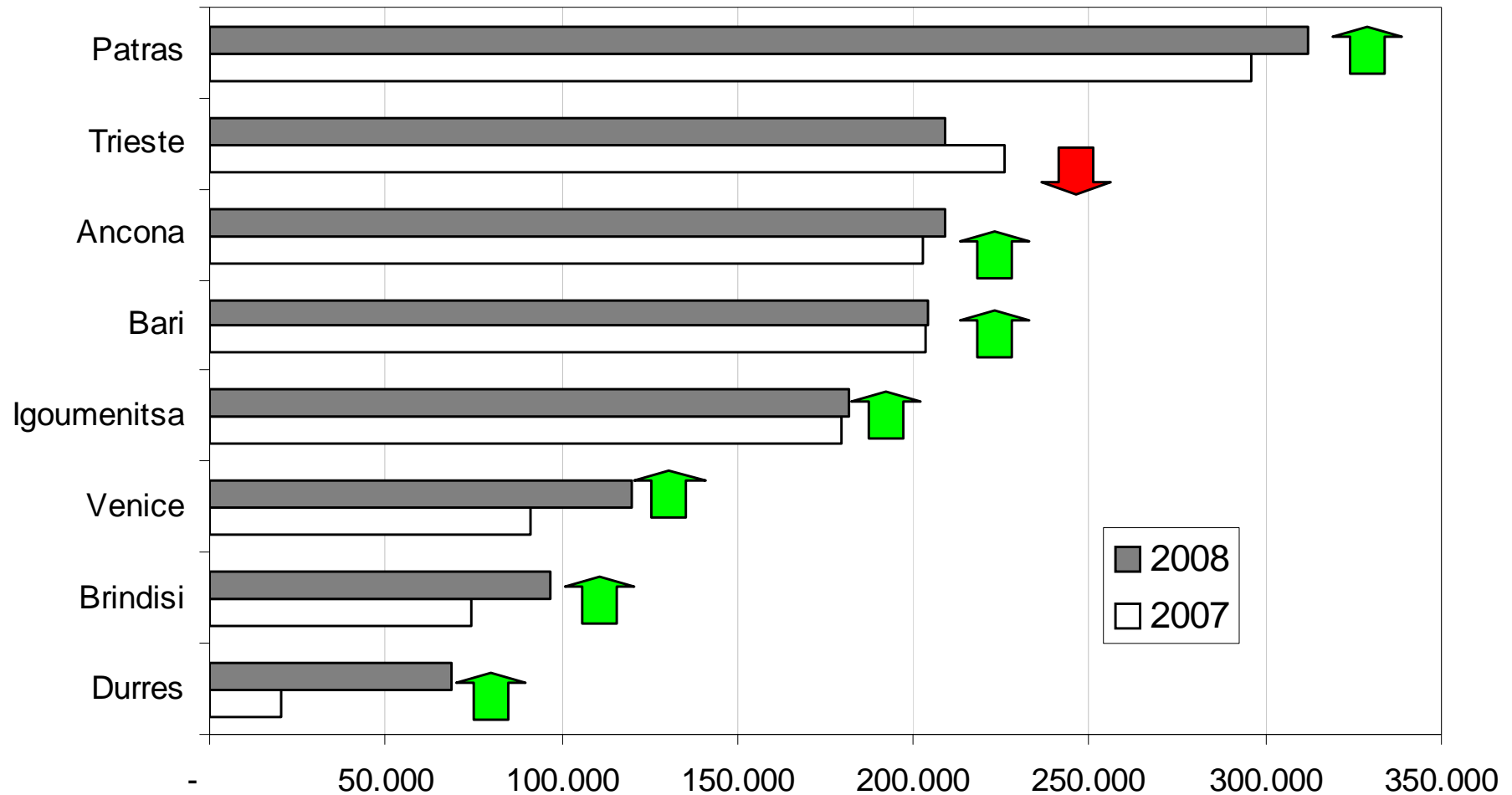
CRUISE TRAFFIC

CRUISE PASSENGERS (embarking, disembarking, transit) - TREND 2001- 2008

	2004	2005	2006	2007	2008
Venezia	677.990	815.153	885.664	1.003.529	1.215.088
Var	-2%	20%	9%	13%	21%
Dubrovnik	260.801	297.466	367.321	435.486	569.117
Var	0%	14%	23%	19%	31%
Bari	262.888	277.979	303.388	351.897	465.739
Var	23%	6%	9%	16%	32%
Split	34.134	47.315	46.999	99.281	124.871
Var	-26%	39%	-1%	111%	26%
Trieste			40.286	54.755	87.740
Var				36%	60%
Ancona	4.949	39.638	18.916	48.652	61.423
	1523%	701%	-52%	157%	26%

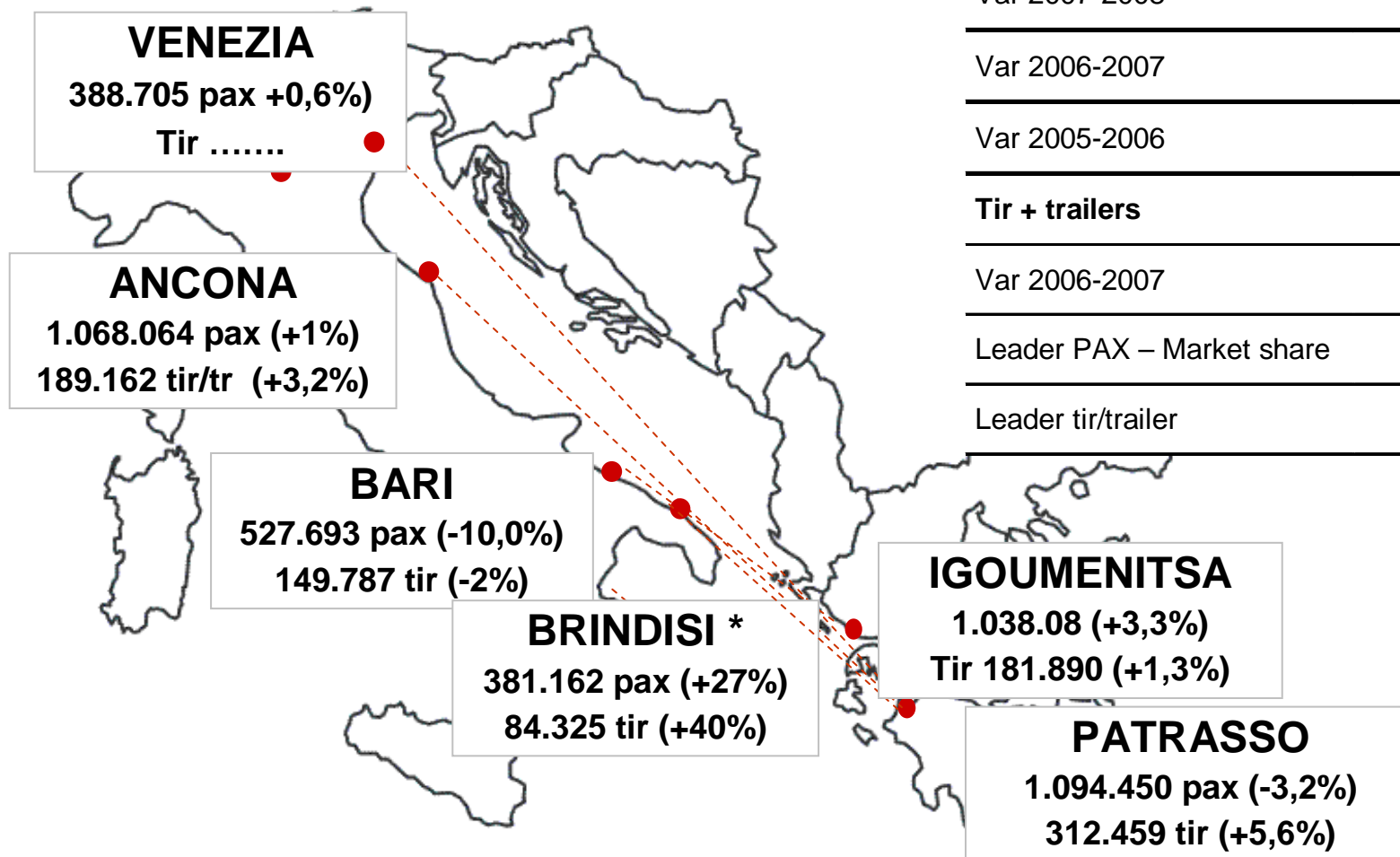
- Cruise is the fastest growing segment (+20% in 2007 and + 26% in 2008) in the Adriatic and Ionian main ports.

TRUCK AND TRAILERS IN ADRIATIC AND IONIAN PORTS



*** Venezia estimated

INTERNATIONAL MOVEMENT TOWARD AND FROM GREECE – 2008 -

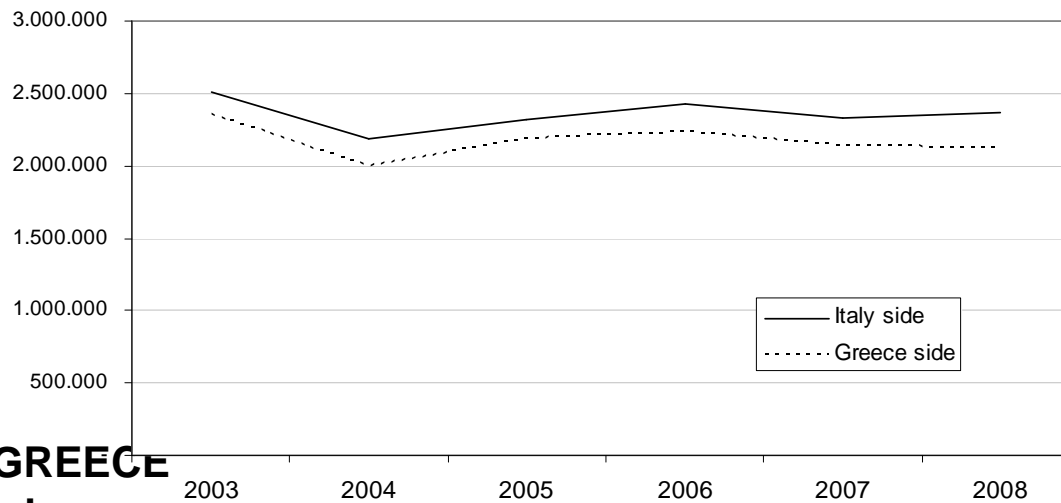


Pax Ita-Gre	2,4 million
Var 2007-2008	+1,6%
Var 2006-2007	-4%
Var 2005-2006	+4,8%
Tir + trailers
Var 2006-2007
Leader PAX – Market share	Ancona 45%
Leader tir/trailer	Ancona ...%

Fonte: elaborazioni Istaot OTM su dati AP

INTERNATIONAL MOVEMENT TOWARD AND FROM GREECE

ADRIATIC PORTS: PAX MOVEMENTS WITH GREECE

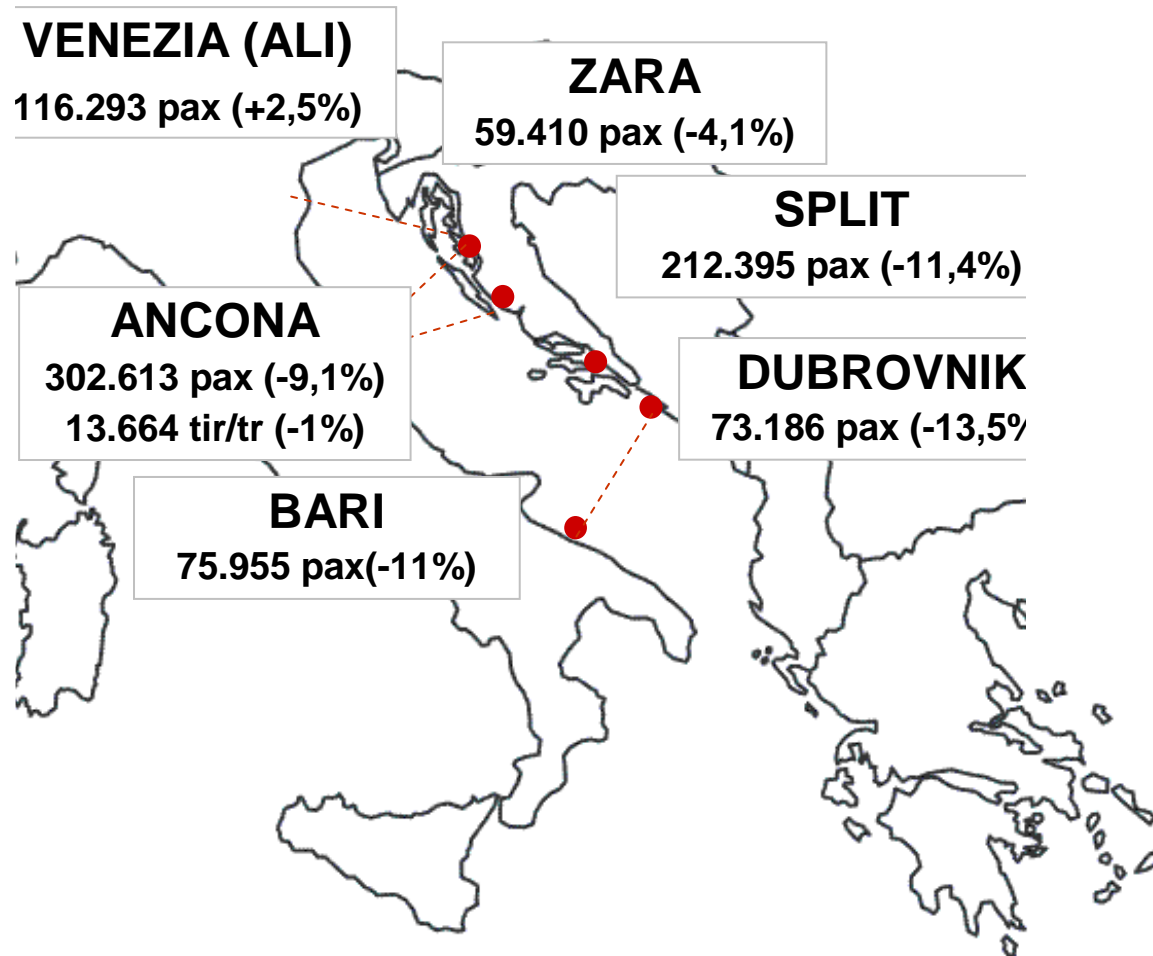


PASSENGERS TRAFFIC WITH GREECE
Italian Adriatic ports market share

	2003	2004	2005	2006	2007	2008
Ancona	40%	42%	45%	46%	45%	45%
Bari	16%	16%	19%	21%	25%	22%
Brindisi	21%	22%	17%	14%	13%	16%
Venezia	14%	11%	19%	19%	17%	16%
Trieste	9%	9%	0%	0%	0%	0%
tot Italia	100%	100%	100%	100%	100%	100%

Fonte: elaborazioni Istaot OTM su dati AP

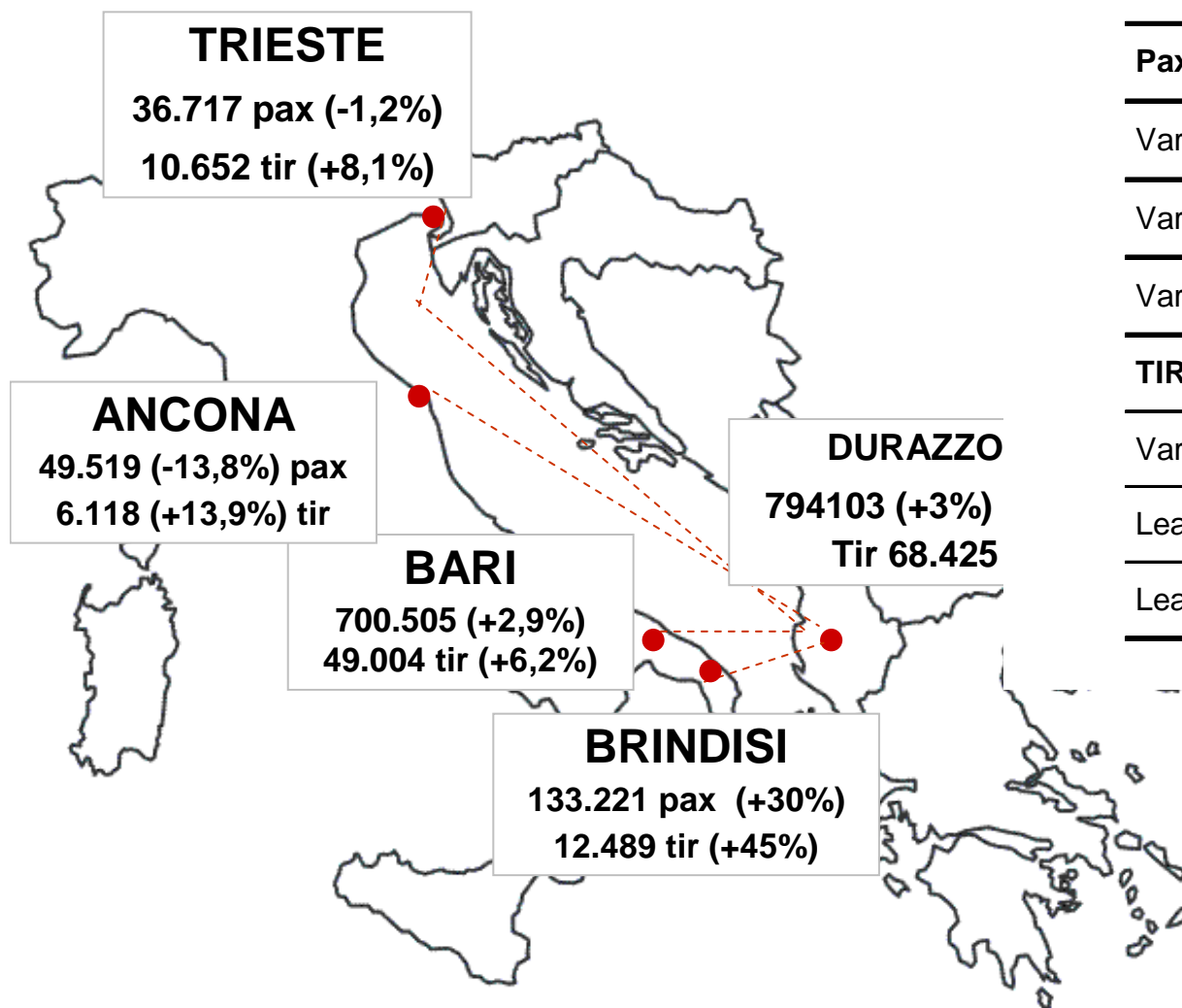
INTERNATIONAL MOVEMENT TOWARD AND FROM CROATIA – 2008



Pax ITA-CRO main ports	495.000
Var 2007-2008	-7%
Var 2006-2007	-4,5%
Var. 2005-2006	-3%
TIR ITA-CRO	14.000
Var 2007-2008	-1%
Leader PAX – Market share	Ancona 61%
Leader TIR – Market share	Ancona 97%

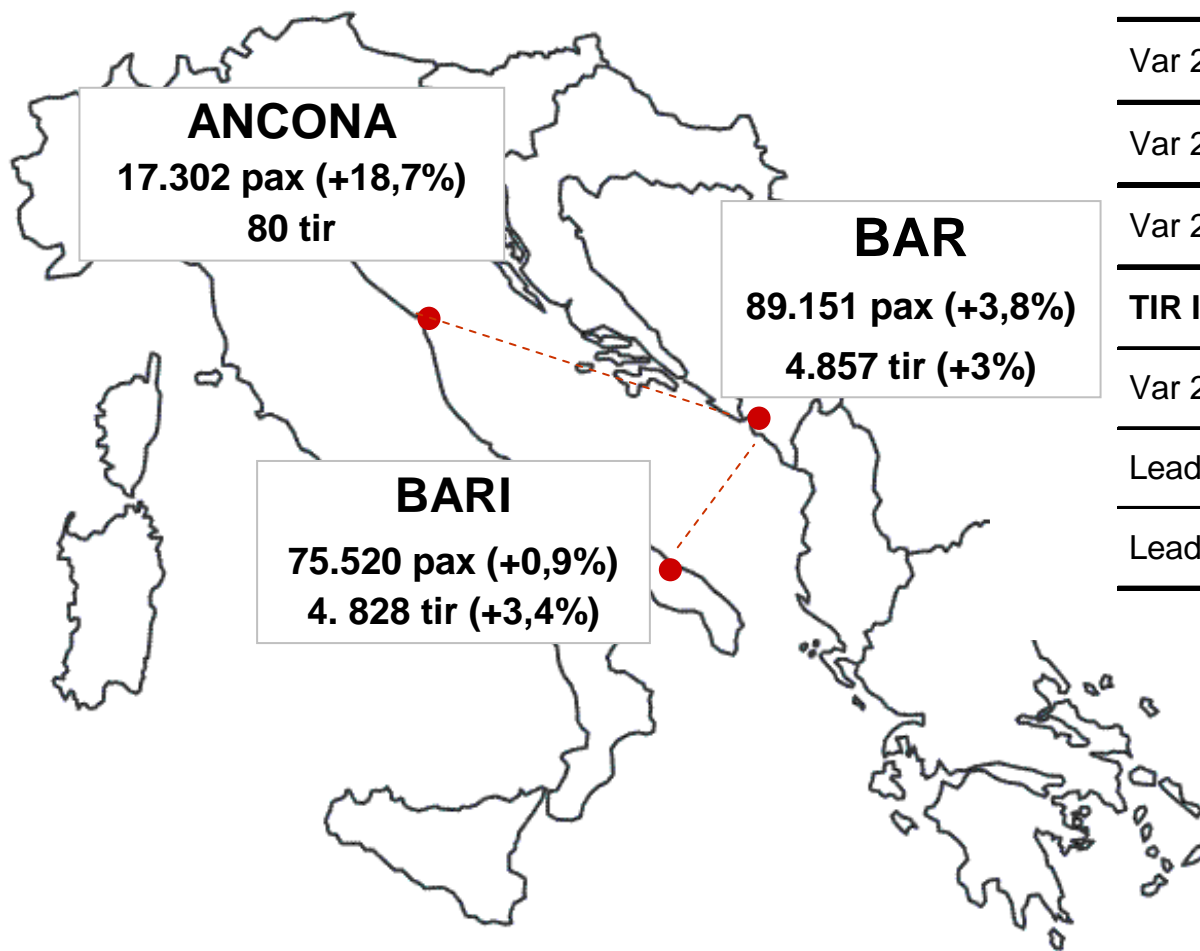
Fonte: elaborazioni Istaot OTM su dati AP

INTERNATIONAL MOVEMENT TOWARD AND FROM ALBANIA – 2008



Pax ITA-ALB	919.000
Var 2007-2008	+4,8
Var 2006-2007	+12,7
Var 2005-2006	-1,8
TIR ITA-ALB	78.623
Var 2007-2008	+11,8%
Leader PAX – Market share	Bari 76%
Leader TIR – Market share	Bari 63%

INTERNATIONAL MOVEMENT TOWARD AND FROM MONTENEGRO – 2008

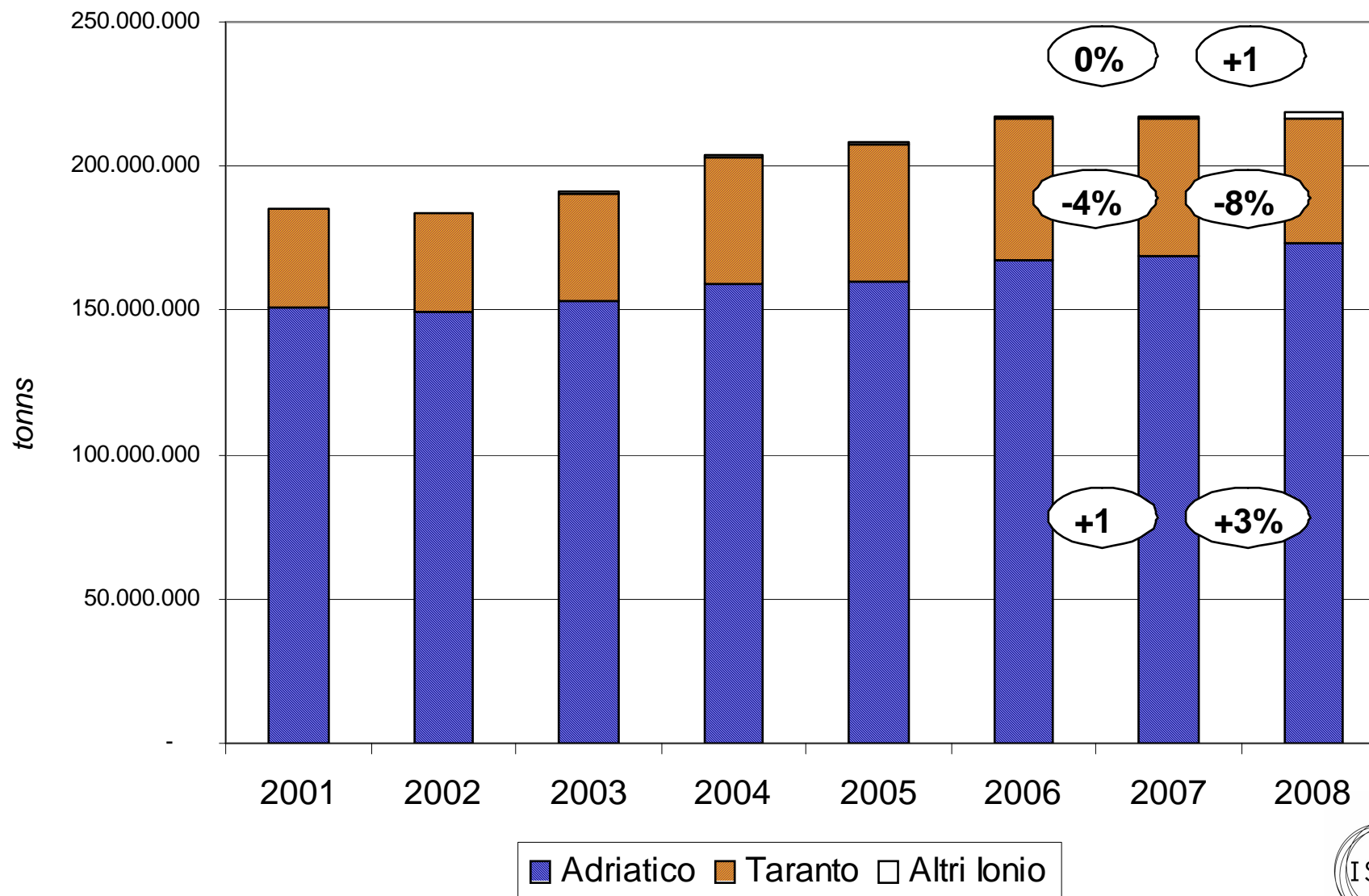


Pax ITA-MONTENEGRO	93.000
Var 2007-2008	+3,8%
Var 2006-2007	+2,4%
Var 2005-2006	+30%
TIR ITA-MONTENEGRO	4.908
Var 2007-2008	+2,8%
Leader PAX – Market share	Bari 81%
Leader TIR – Market share	Bari 98%

GOODS TOTAL MOVEMENTS

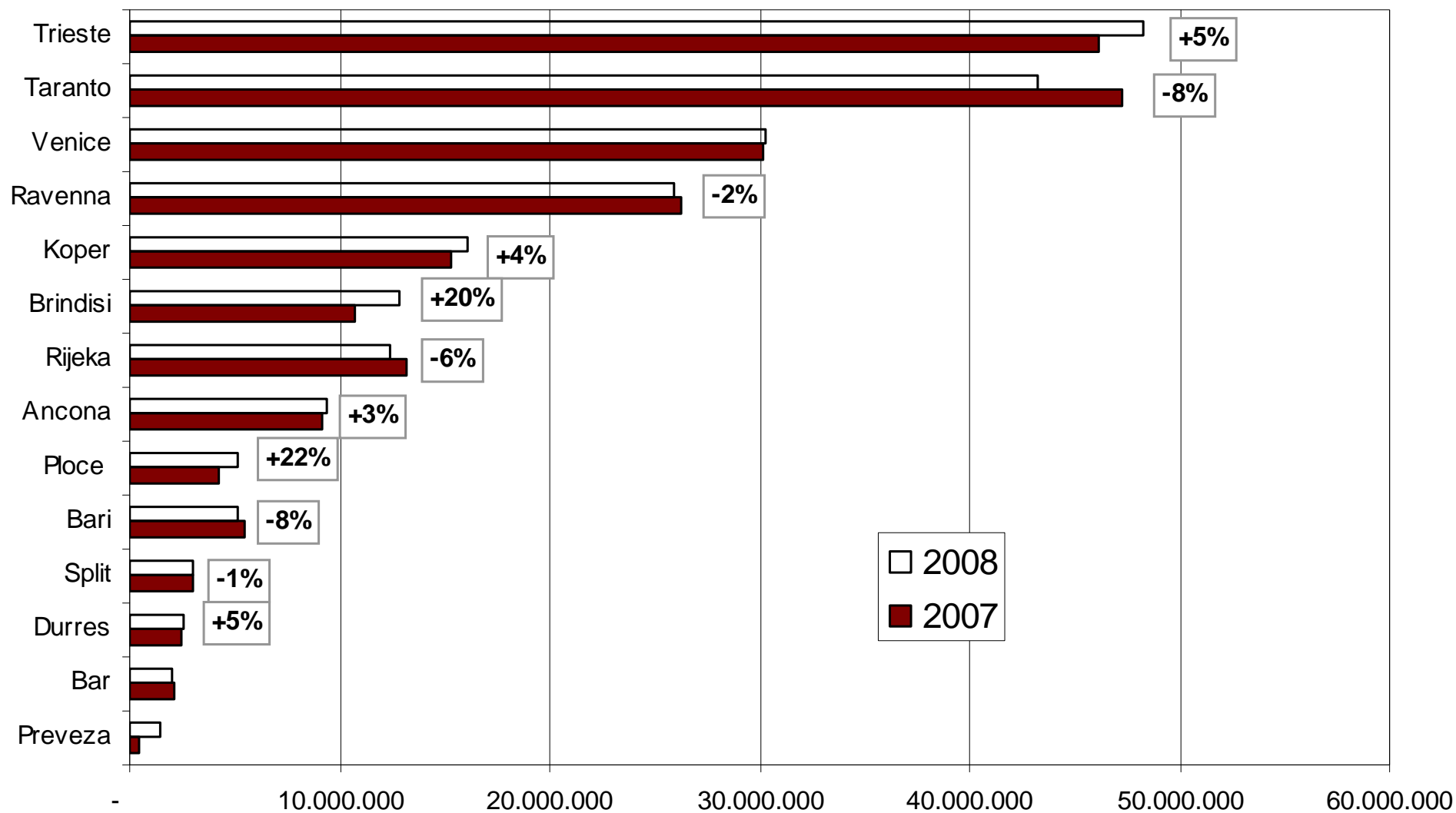
219 Mil of tons in 2008

GOODS TOTAL MOVEMENTS – Tons and Var %



Fonte: elaborazioni Istaot OTM su dati AP

GOODS TOTAL MOVEMENTS: PORTS

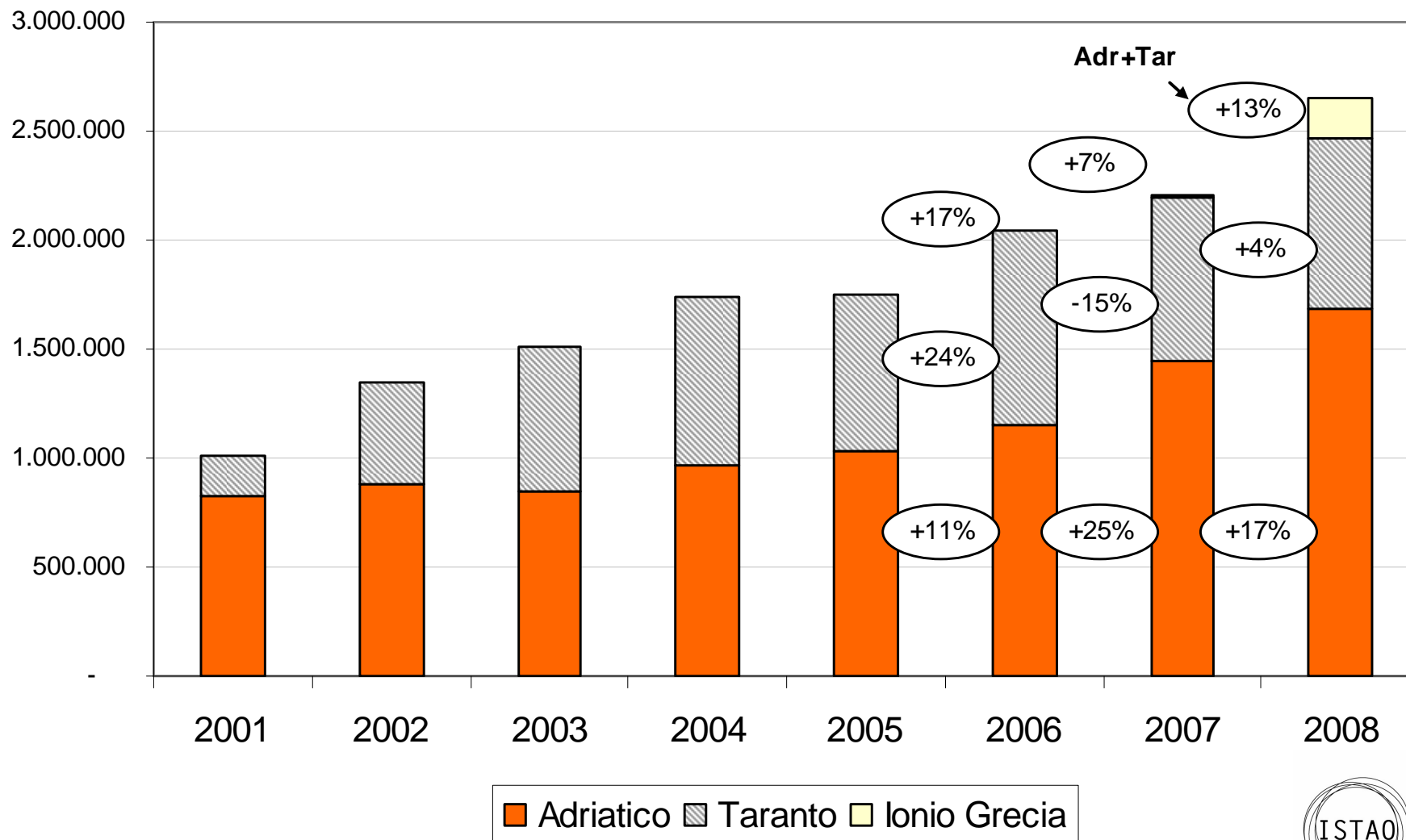


Fonte: elaborazioni Istaot OTM su dati AP

CONTAINER MOVEMENTS IN A-I AREA

Adriatic (1.686.000 teus) + Taranto (787.000 teus) + Greek ionian ports

CONTAINER TRAFFIC - TEUS



Fonte: elaborazioni Istaot OTM su dati AP

PORTS - CONTAINER MOVEMENTS 2007 - 2008

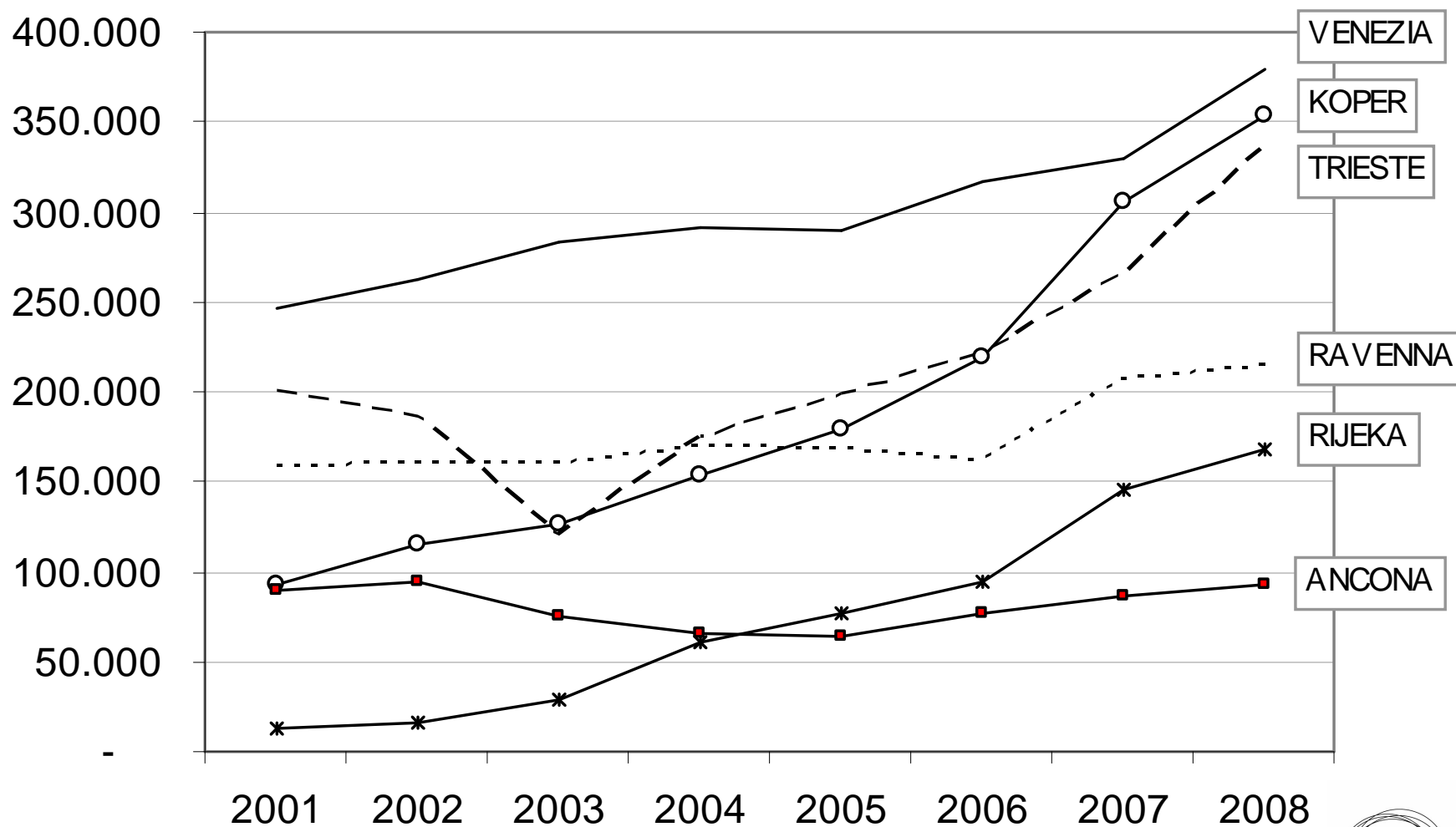
CONTAINER TRAFFIC - in .teus

	2007	2008	Var %
Taranto	755.934	786.655	+4%
Venezia	329.512	379.072	+15%
Koper	305.648	353.880	+16%
Trieste	265.863	335.943	+26%
Ravenna	206.580	214.324	+4%
Astakos	6.000	180.000	nd
Rijeka	145.040	168.761	+16%
Ancona	87.193	92.068	+6%
Bar	27.095	43.708	+61%
Ploce	29.385	35.163	+20%

Fonte: elaborazioni Istaot OTM su dati AP

CONTAINER TRAFFIC TREND

CONTAINER TRAFFIC TEU IN THE MAIN ADRIATIC AND IONIAN PORTS



Fonte: elaborazioni Istaot OTM su dati AP

- **TRAFFIC AND TRENDS**
- **PORTS AND ECONOMIC CRISIS**
- **EUROPEAN POLICIES**

THE ANALYSIS

AIMS

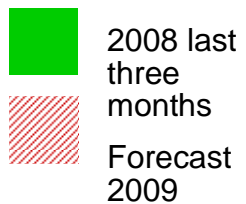
- A general overview about maritime traffic trends during the first phase of the economic downturn (last two months in 2008);
- First forecasts about ports' traffic in 2009 and about the evolution of the competitive setting.

METHODOLOGY

- Questions about the competitive setting to the Port Authorities of the area.

2008 LAST THREE-MONTH PERIOD AND FORECASTS FOR 2009

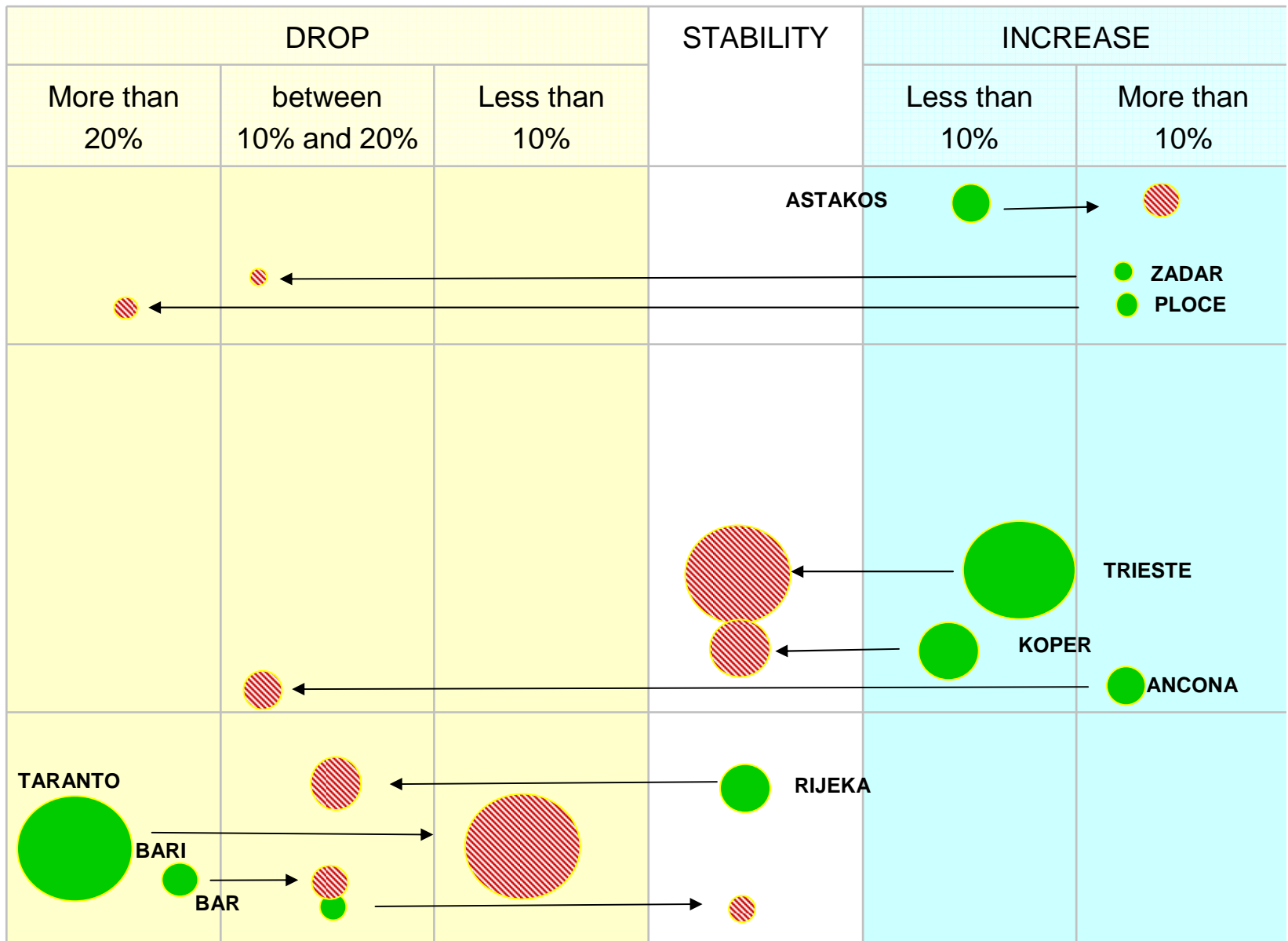
TOTAL GOODS



Var 2007-2008



+20%

0%



2008 LAST THREE-MONTH PERIOD AND FORECASTS FOR 2009

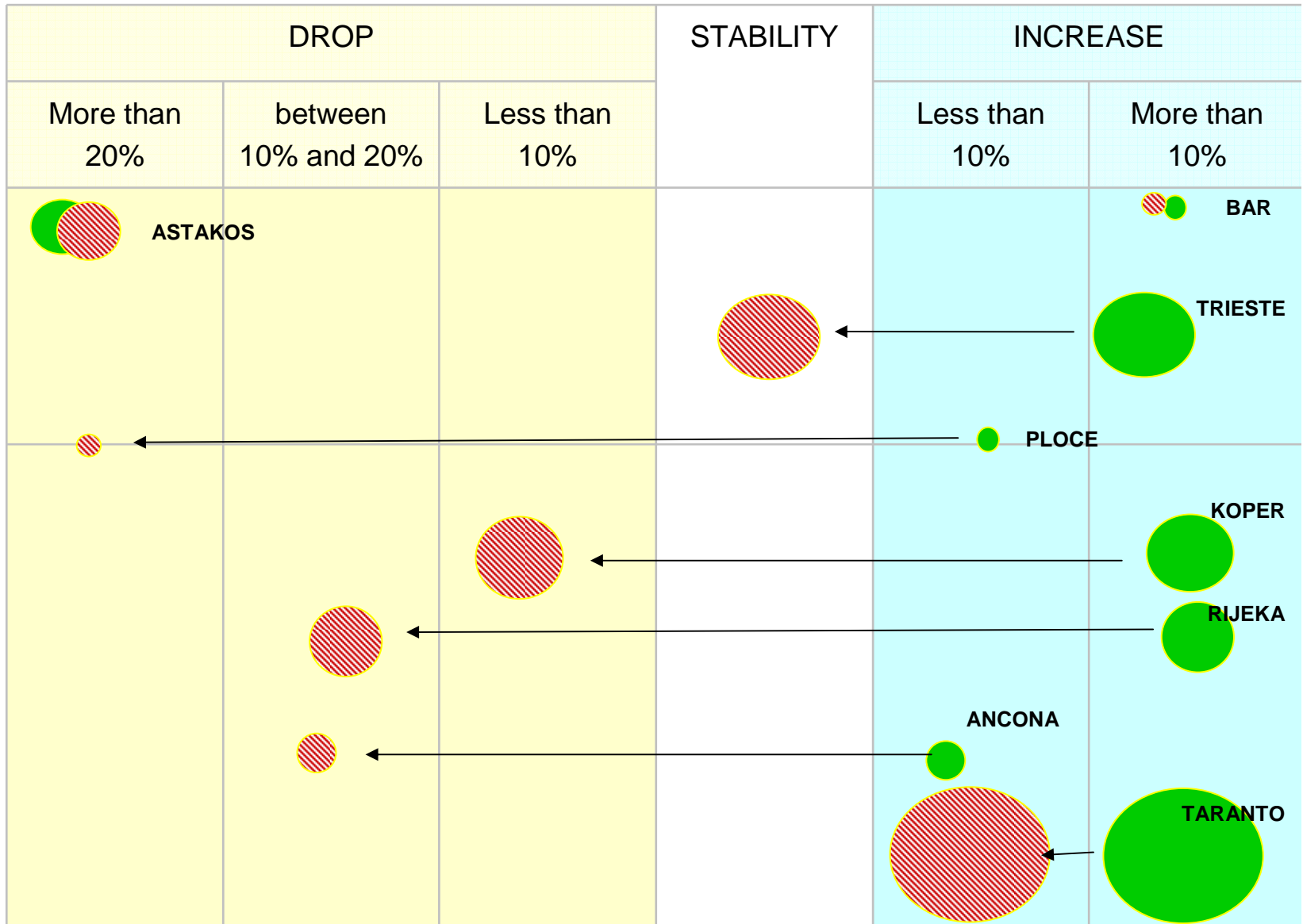
CONTAINER

 2008 last three months
 Forecast 2009

Var 2007-2008



+20%

0%



2008 LAST THREE-MONTH PERIOD AND FORECASTS FOR 2009

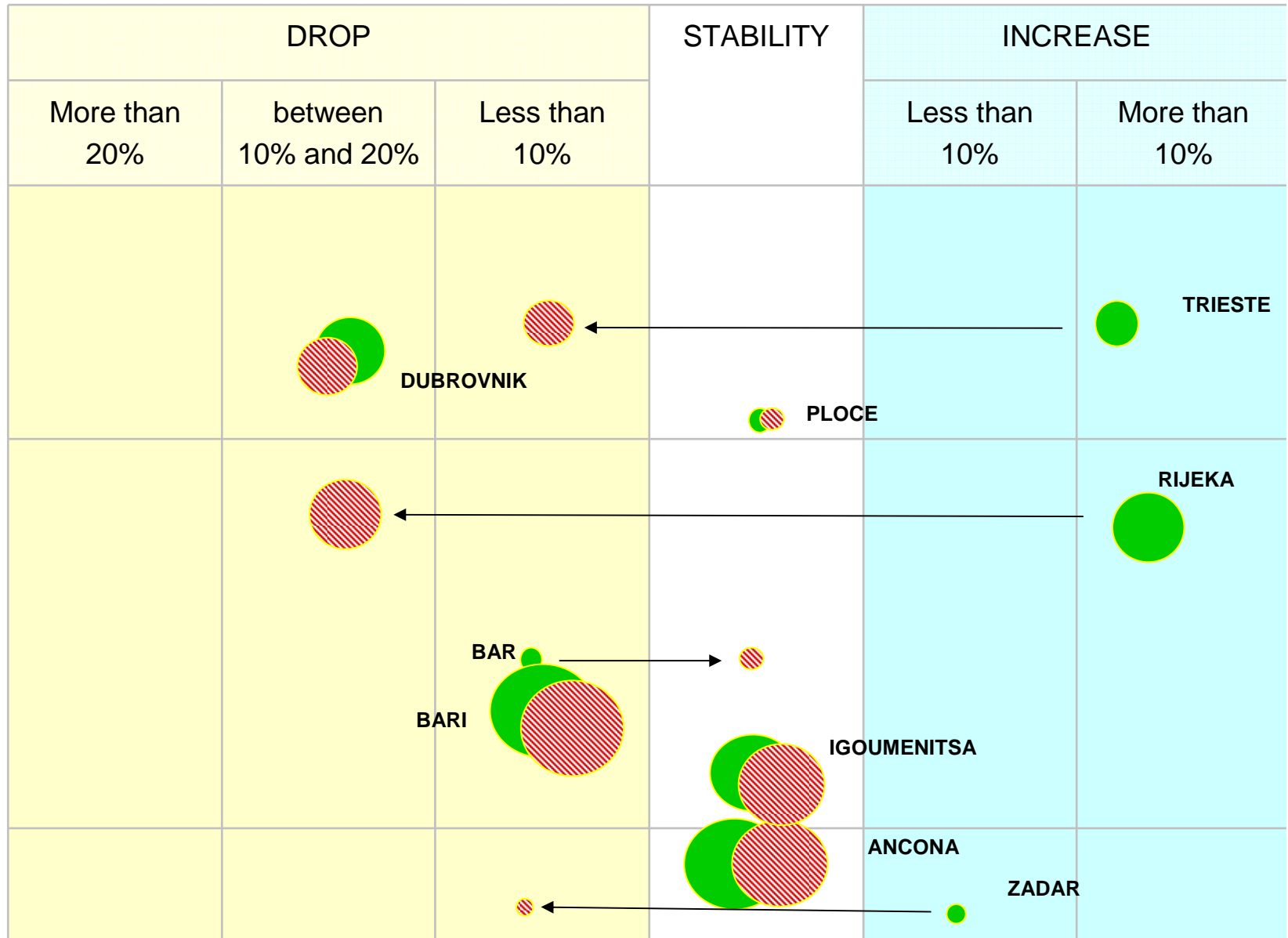
PASSENGERS

 2008 last three months
 Forecast 2009

Var 2007-2008



+20%

0%



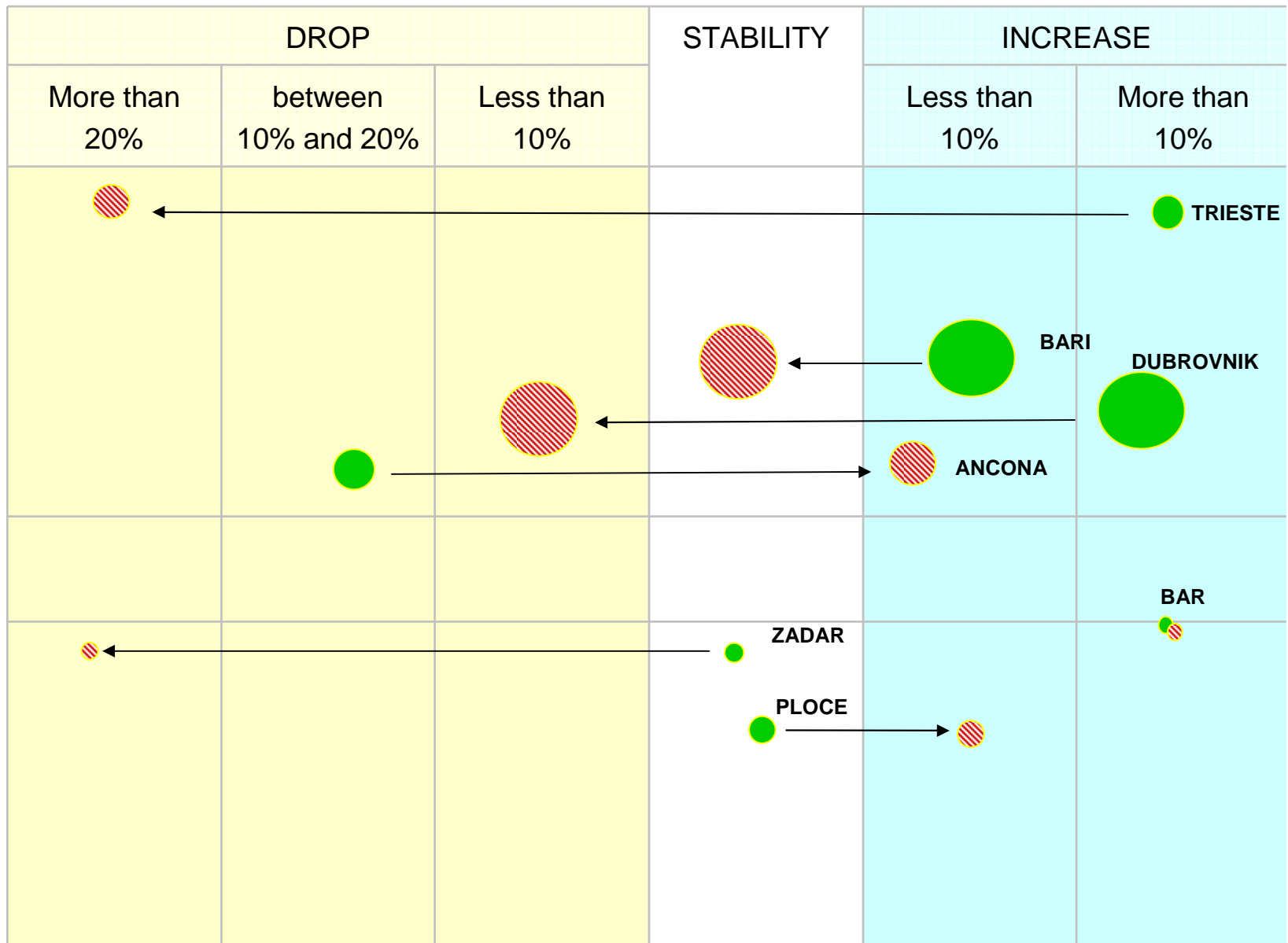
2008 LAST THREE-MONTH PERIOD AND FORECASTS FOR 2009

CRUISERS

 2008 last three months
 Forecast 2009

Var 2007-2008

+20%
0%



CRISIS AND STRATEGIES

Has the current global crisis influenced the generalized reduction of freight costs?

YES: 13 (tot. 16)

If yes, could you please show us the average reduction?

	N.
Up to 10%	5
Between 10% and 30%	3
Between 30% and 50%	4
More than 50%	0
TOT.	12

CRISIS AND STRATEGIES

Do you think the global economics crisis will force the shipping companies to rationalize the number and the frequency of the lines and the ports of call?

YES: 14 (tot. 16)

If you think so, do you believe this strategies will concern the Mediterranean area as well?

YES: 14 (tot. 16)

Which Mediterranean areas do you think will be particularly subjected to rebounds

	<i>Citations</i>
<i>All the Maditerranean areas</i>	5
<i>East Med</i>	3
<i>Adriatic</i>	2
<i>Tirrenic area</i>	1
<i>Nord Africa</i>	1
<i>West Mediterranean</i>	0

CRISIS AND STRATEGIES

Have you noticed any direct effect in this sense (or do you think this will happen in the next months?)

YES: 12 (tot. 16)

	Cit.
<i>Elimination of shipping lines</i>	2
<i>Reduction of scheduled ports of call</i>	8
<i>Other</i>	1

Is your company to undertake or has already undertaken a specific strategy to overcome the global crisis?

YES: 12 (tot. 16)

	Cit.
<i>Service tariffs cut</i>	3
<i>Rationalization of costs</i>	6
<i>Human resources made redundant</i>	1
<i>Investment plan review</i>	7

- **TRAFFIC AND TRENDS**
- **PORTS AND ECONOMIC CRISIS**
- **EUROPEAN POLICIES**

TEN-T – Implementation of the priority projects

Trans-European transport network
Projects monitored
by the TEN-T Executive Agency
2006

■ TEN-T funded projects

Advancement of the Priority projects (2006)

Priority project sections (roads), Priority project sections (airports)

Green line	Priority project sections (airports)
Yellow line	Priority project sections (airports)
Orange line	Priority project sections (airports)
Red line	Priority project sections (airports)
Blue line	Priority project sections (airports)

Priority project sections (airports)

Green line	Priority project sections (airports)
Yellow line	Priority project sections (airports)
Orange line	Priority project sections (airports)
Red line	Priority project sections (airports)
Blue line	Priority project sections (airports)

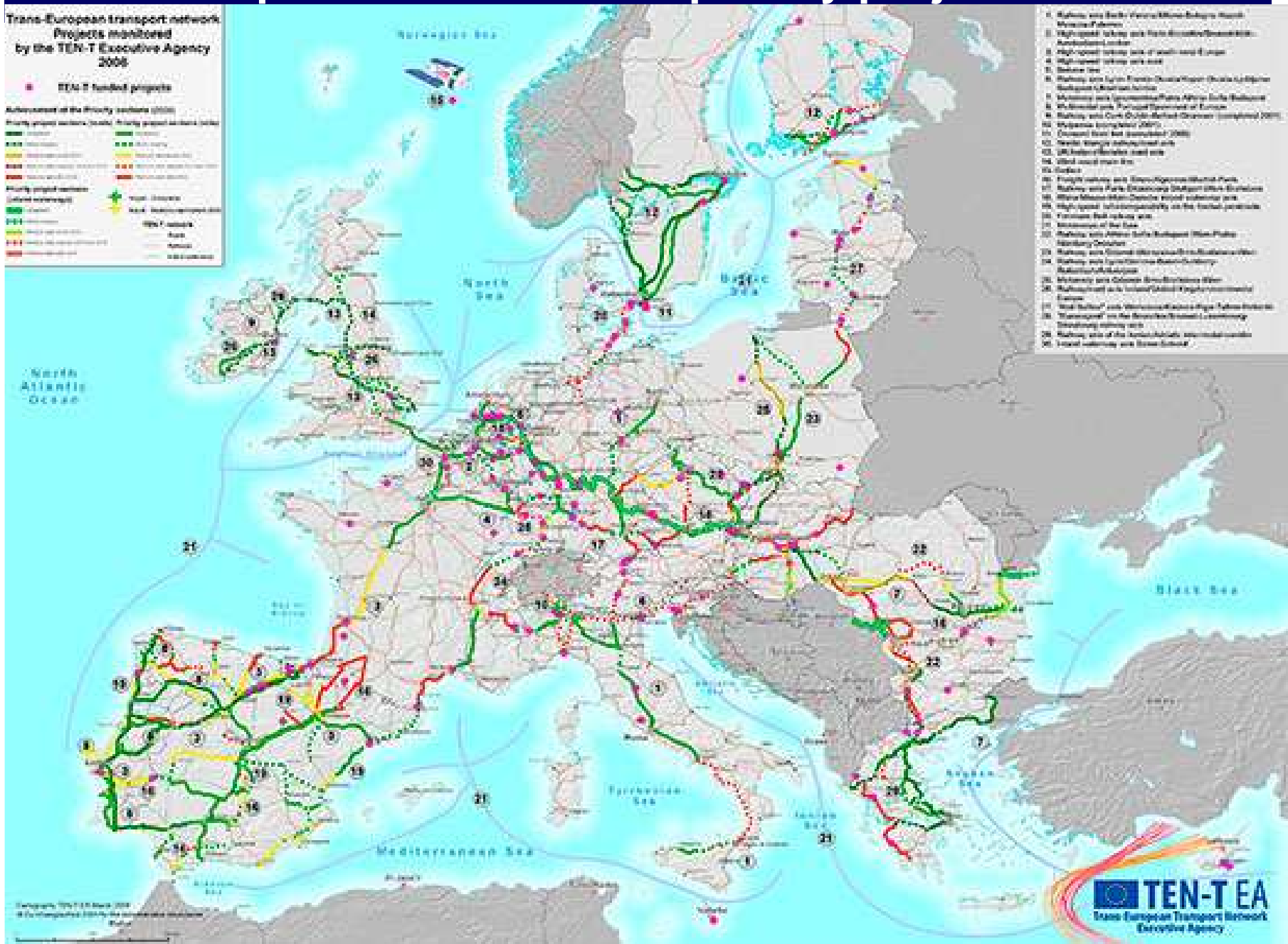
Priority project sections (airports)

Green line	Priority project sections (airports)
Yellow line	Priority project sections (airports)
Orange line	Priority project sections (airports)
Red line	Priority project sections (airports)
Blue line	Priority project sections (airports)

Priority project sections (airports)

Green line	Priority project sections (airports)
Yellow line	Priority project sections (airports)
Orange line	Priority project sections (airports)
Red line	Priority project sections (airports)
Blue line	Priority project sections (airports)

1. Railway line Berlin-Vienna/Munich-Belgrade through Moscow/Poland
2. High-speed railway line Paris-Brussels/Strasbourg-Antwerp/Amsterdam
3. High-speed railway line of south-west Europe
4. High-speed railway line east
5. Baltic Sea
6. Railway line Lyon-France-Genoa/Spain-Strasbourg-Brussels/Amsterdam/Paris
7. Railway line Lyon-France-Genoa/Spain-Strasbourg-Brussels/Amsterdam/Paris-Agde/Italy-Belgium
8. Mediterranean, Fehmarn, Skagerrak of Europe
9. Railway line Cork-Dublin-Belfast-Glasgow (completed 2005)
10. Helsinki-Berlin/Paris (2005)
11. Denmark Strait Rail (completed 2005)
12. New line through southern part
13. JGK/Amsterdam road link
14. JGK road main line
15. Berlin
16. Freight railway line Moscow/Poland/Berlin/Paris
17. Railway line Paris-Strasbourg/Strasbourg-Berlin/Amsterdam/Paris
18. High-speed infrastructure on the Berlin-Paris route
19. High-speed infrastructure on the Berlin-Paris route
20. Fehmarn Belt railway link
21. Stockholm of the Sea
22. Railway line Athens-Sofia/Belgrade-Paris-Paris-Brussels/Amsterdam
23. Railway line Madrid-Barcelona/Berlin/Amsterdam/Paris
24. Railway line Lyon-France-Genoa/Spain-Strasbourg-Brussels/Amsterdam/Paris
25. Railway line Cologne-Berlin/Paris/Amsterdam/Paris
26. Rail transport in the Balkans (2005)
27. "Red Bull" and "White Bull" (2005)
28. "Marek" on the Berlin/Brussels/Amsterdam/Paris railway line
29. Railway line of the Iberian Peninsula, Mediterranean
30. Road railway line Brussels/Amsterdam



Cartography: 2004/2005 March 2006
© 2006 Trans-European Transport Network Executive Agency



ISTITUTO
ADRIANO OLIVETTI
DI STUDI PER
LA GESTIONE
DELL'ECONOMIA
E DELLE AZIENDE

TEN-T – PROJECT N. 6: Implementation

Estimated fulfillment

2025

PP. N 7	Total
Lenght of the PP in Km	1.688
<i>Works ongoing</i>	<i>9,4%</i>
<i>Works completed</i>	<i>11,3%</i>
<i>Works to be started</i>	<i>79%</i>

PP. N 7	In Mil €
TOTAL COSTs IN Mil €	60.742
Total inv. Before 2007	7.827
Investment 2007-2013	10.428
<i>Remaining investment</i>	<i>42.487</i>
	<i>(70%)</i>

Completed: 190 km



Total PP6: 1688 km



TEN-T – PROJECT N. 7: Implementation

Estimated fulfillment **2020**

PP. N 7	Total
Lenght of the PP in Km	3.333
<i>Works ongoing</i>	18,3%
<i>Works completed</i>	47,8%
<i>Works to be started</i>	33,9%

PP. N 7	In Mil €
TOTAL COSTS IN Mil €	14.928
Total inv. Before 2007	10.051
Investment 2007-2013	4.728
<i>Remaining investment</i>	150 (0%)



Total PP7: 3333 km

TEN-T – PROJECT N. 29: Implementation

Estimated fulfillment **2019**

PP. N 7	Total
Lenght of the PP in Km	606
<i>Works ongoing</i>	<i>0%</i>
<i>Works completed</i>	<i>0%</i>
<i>Works to be started</i>	<i>100%</i>

PP. N 7	In Mil €
TOTAL COSTs IN Mil €	4.308
Total inv. Before 2007	81
Investment 2007-2013	1.074
<i>Remaining investment</i>	<i>3.153</i>
	<i>(73%)</i>



Completed: 0 km



Total PP29: 606 km

PP 21 – Motorways of the sea and MARCO POLO PROGRAMME

- *for projects which shift freight transport from the road to sea, rail and inland waterways*

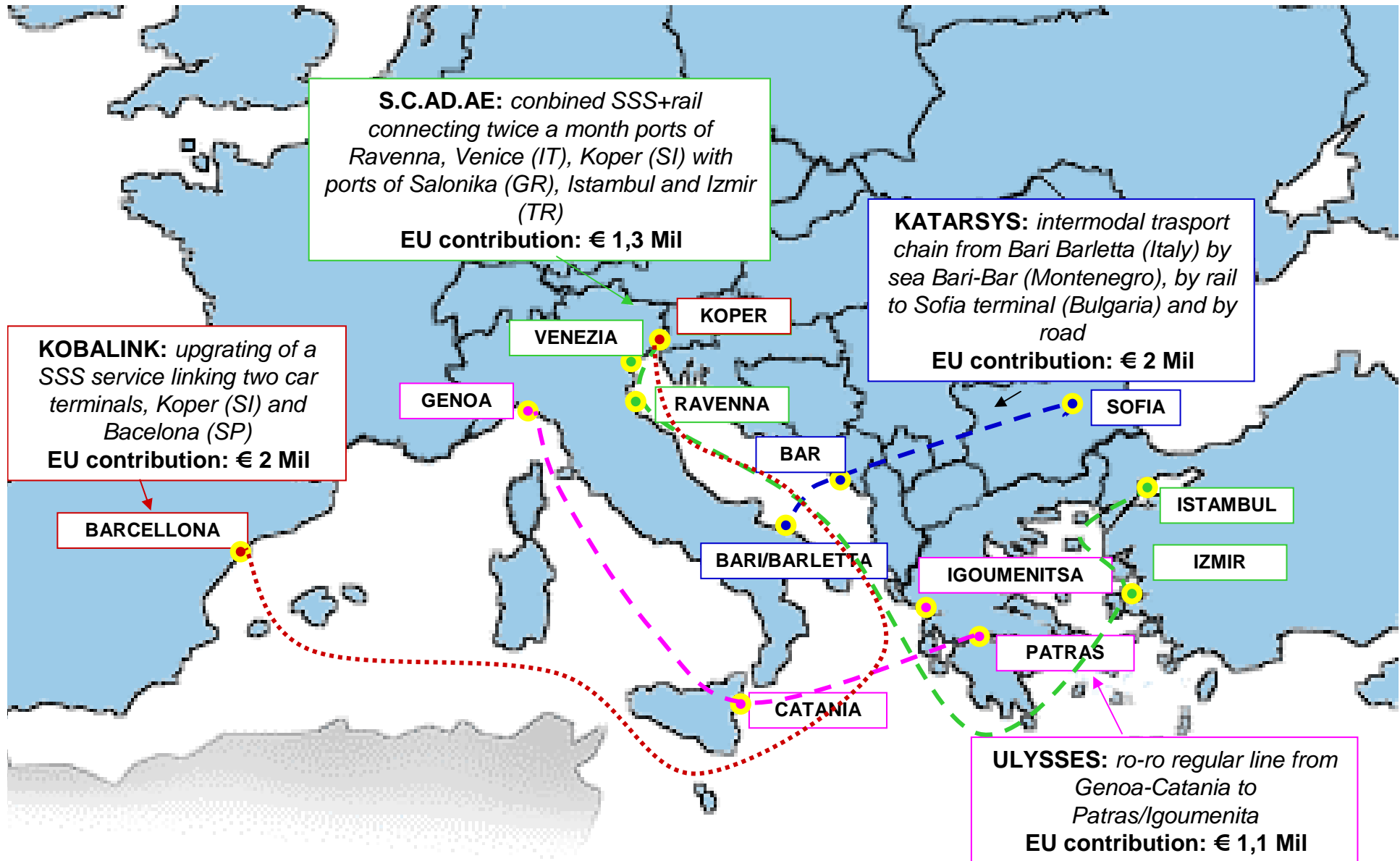


MARCO POLO | 
NEW WAYS TO A GREEN HORIZON

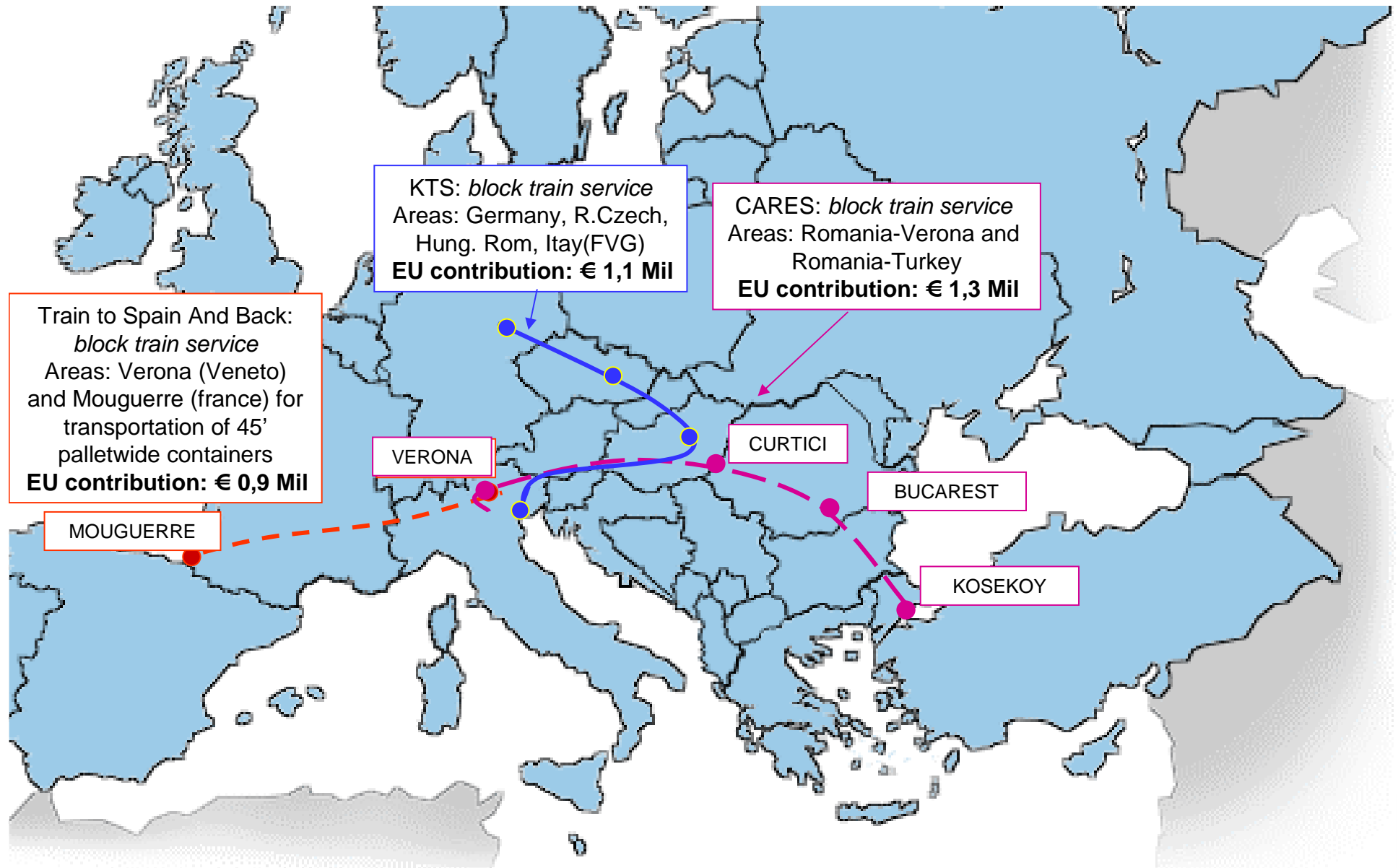
2009 Call for proposals

- Some € 62 million are available, supporting between 35% and 50% of the eligible project costs.
- The deadline to submit project proposals is **8 May 2009**.
- Only commercial undertakings (possibly owned by public administrations) from the EU, Norway, Iceland, Liechtenstein and **Croatia** can apply.
- Usually, the project must involve at least two partner organisations from two eligible countries. One-applicant projects are an exception. Pure infrastructure projects, research & development projects and studies are not eligible.

2008 - FINANCED PROJECTS A-I : SHIPPING...



2008 - FINANCED PROJECTS A-I: ...AND RAIL



TEN-T – A POLICY REVIEW

“Since the drafting of the TEN-T guidelines in 1996, the social, political and economical context has changed considerably. Europe's growing global role, the globalisation of our economy, the fight against climate change, the geographical extension of the EU and the need to build good connections with its neighbours are just some of the challenges that have to be tackled, meaning that a more fundamental review of TEN-T policy is necessary”.

14-15 october 2008



TEN-T Days

February 2009

GREEN PAPER “TEN T POLICY REVIEW -towards a better integrated transeuropean transport network at the service of the common transport policy



Public consultation

The results of this consultation will be taken into consideration by the Commission in the elaboration of possible legislative and other proposals. The main legislative proposal expected to come out of the Green Paper process concerns a revision of the Community Guidelines for the development of the trans-European transport network.

CONCLUSIONS

CONCLUSIONS (1)

- Maritime traffics have globally increased during 2008;
- On the passengers side, the high rate of increase is due to the cruise segment. Leaders are Bari and Venice, where cruise share on the global passengers movement is higher than the other ports;
- Boats segment is more steady and the biggest ports (Ancona, Patras and Igoumenitsa) increased at a low rate.
- On the freights side, in 2008 containers continued to increase quickly. Venice is still the leader, but its volumes are quite the same than Koper and Trieste; container are strongly focused on the North Adriatic ports.

CONCLUSIONS (2)

- Other goods movements are less regular and forecasts for 2009 have pointed out a pessimist trend. The expected downturn is due to the general economic crisis and to the shift toward containers for freight maritime traffic;
- Forecasts are more optimistic for cruise and container segments; cruise movements will continue to increase, even if at a lowest rate.

CONCLUSIONS (3)

- European programmes about the Adriatic and Ionian basins are at a different level of implementation;
- Motorways of the Sea have been at the centre of the attention in 2008. Marco Polo II has already financed some services that interest the Adriatic and Ionian basin;
- Among the Pot Authorities, only Marche Region and Ancona are not interested by any EU project or initiative;
- EU started public consultations for a revision of the TEN-T plan; this is the best moment to make marginalised area instances emerge at the level of institutional discussion.

Thank you

Ida Simonella

OSSERVATORIO SUI TRASPORTI MARITTIMI
ISTITUTO ADRIANO OLIVETTI DI STUDI
PER LA GESTIONE DELL'ECONOMIA E DELLE AZIENDE

Via Zuccarini, 15

60131 Ancona

Tel: +39 071 2901144

FAX: +39 071 2901017

www.istao.it

