MAKING PORTS AND LOGISTICS NETWORKS AND AN ASSET FOR REGIONAL DEVELOPMENT

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Making ports and logistics networks
an asset for regional development
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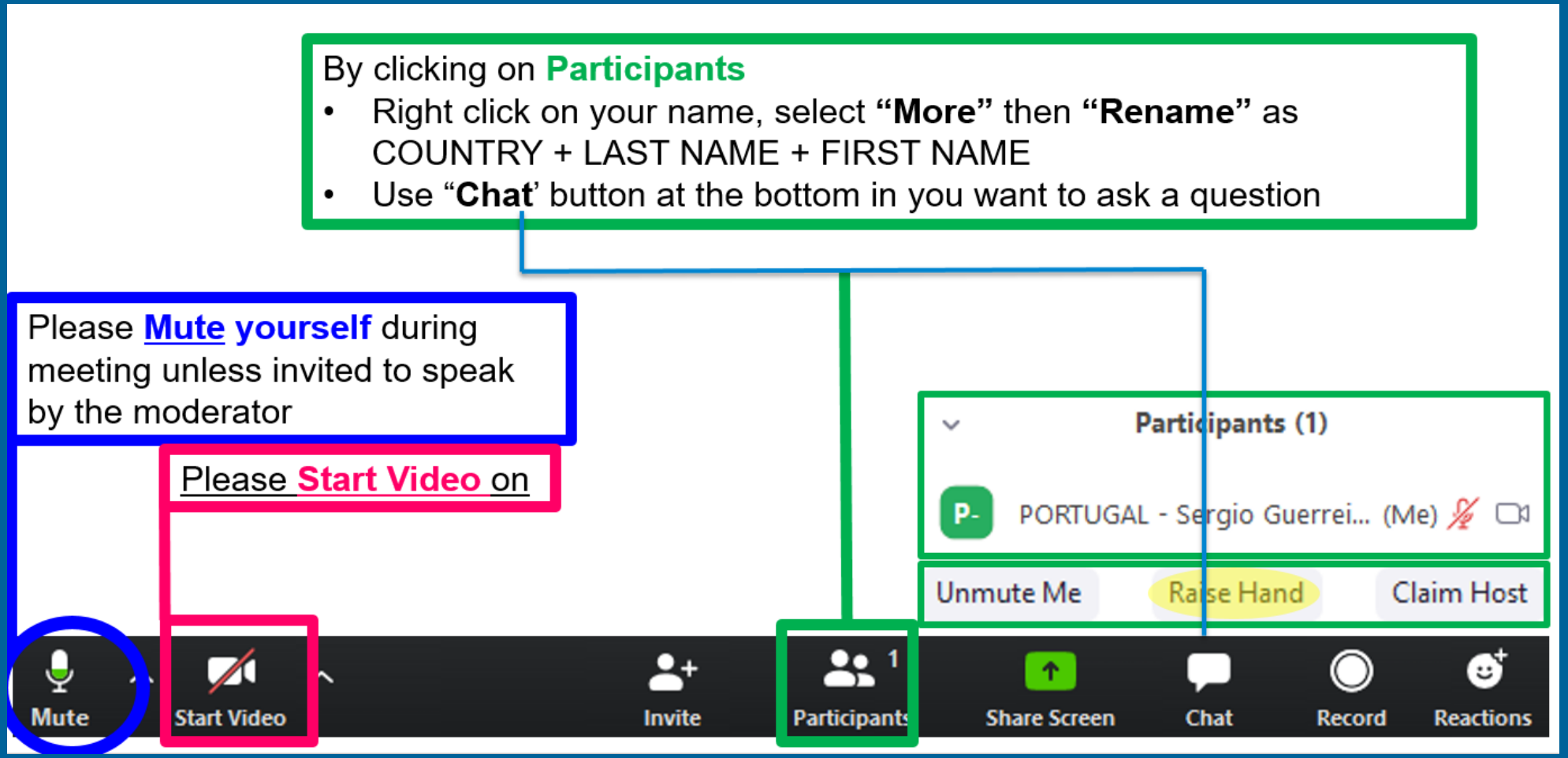
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Zoom interpretation

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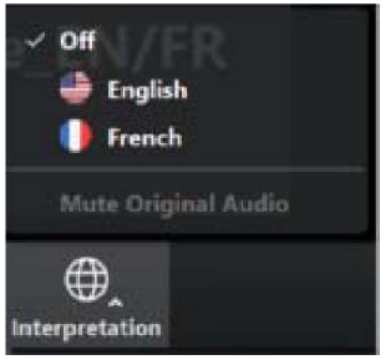

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Opening Remarks

Claire Charbit
Head of Territorial Dialogue and Migration Unit
OECD Centre for Entrepreneurship, SMEs, Regions & Cities (CFE)
OECD

Olaf Merk
Project Manager Ports and Shipping
International Transport Forum (ITF)
OECD

Bruno Delsalle
General Manager
International Association of Ports Cities (AIVP)

Panel 1 - *The links between types of ports and regional development: What demand for what type of ports?*

William Friedman
CEO, Port of Cleveland

Ireland
Liam Lacey
Director, Irish Maritime Development Office

Portugal
Ana Rita Rosa
Director, Systems, Planning and Communication
Ports of Sines and Algarve Authority

Colombia
Jonathan Bernal
Director for Infrastructure, National Planning Department DNP

Panel 2 - *Connecting ports with hinterland regions for inclusive and sustainable development*

Anna Bottasso
Professor and Director of the Phd program in Economics,
University of Genoa UNIGE

France
Arthur Marronnier
Head of Development of Major French Ports

Spain
Cristina Barahona
Managing Director of the Ports of the Balearic Islands (Ports de les Illes Balears)

Ireland
David Minton
Director, Northern and Western Regional Assembly

Conclusions: A development perspective

Sebastián Nieto Parra
Head of Latin America and Caribbean Unit
Development Centre (DEV)
OECD

Thank you! / Muchas gracias! / Merci Beaucoup!

OECD Centre for Entrepreneurship, SMEs, Regions & Cities (CFE)

- Claire Charbit – claire.charbit@oecd.org
- Peter Haxton – peter.haxton@oecd.org
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Rethinking Regional Attractiveness – Webinar # 2

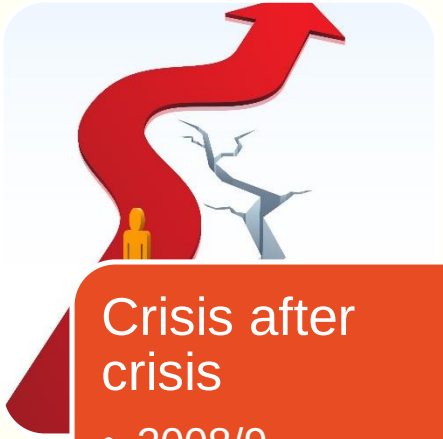
May 24th, 2022 – ***Making Ports and Logistics Networks an Asset for Regional Development***

Claire Charbit, Head of Unit, CFE/RDG/RAMI

OECD

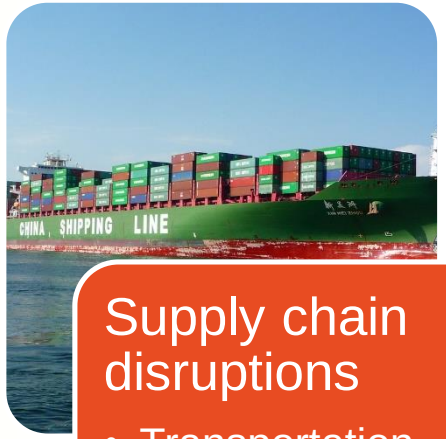
Co-funded by the European Union

A volatile global environment renders logistics networks ever more important



Crisis after crisis

- 2008/9
- COVID-19
- War in Ukraine



Supply chain disruptions

- Transportation costs rise
- Shortage of necessary goods

Volatility in trade, markets

- Soaring energy prices
- Cost of key commodities on the rise

Regional attractiveness indicators: why and for whom?

Regional data is important for developing a tool for promoting territorial development towards various targets. The approach aims to provide an analytical framework support policy makers at different levels of government

INVESTORS

The concerns of **investors** – and **exporters** - to locate in a territory conducive to the development of their activities concern research and innovation, but also the availability of infrastructure, land, digital connectivity and skills.

TALENT

The demands of **talent** in terms of employment, but also in broader terms of "well-being", such as access to health care and education for themselves and their families and cultural and environmental amenities

VISITORS

Visitors outlook regarding cultural and natural capital and the availability of services for tourism activities.

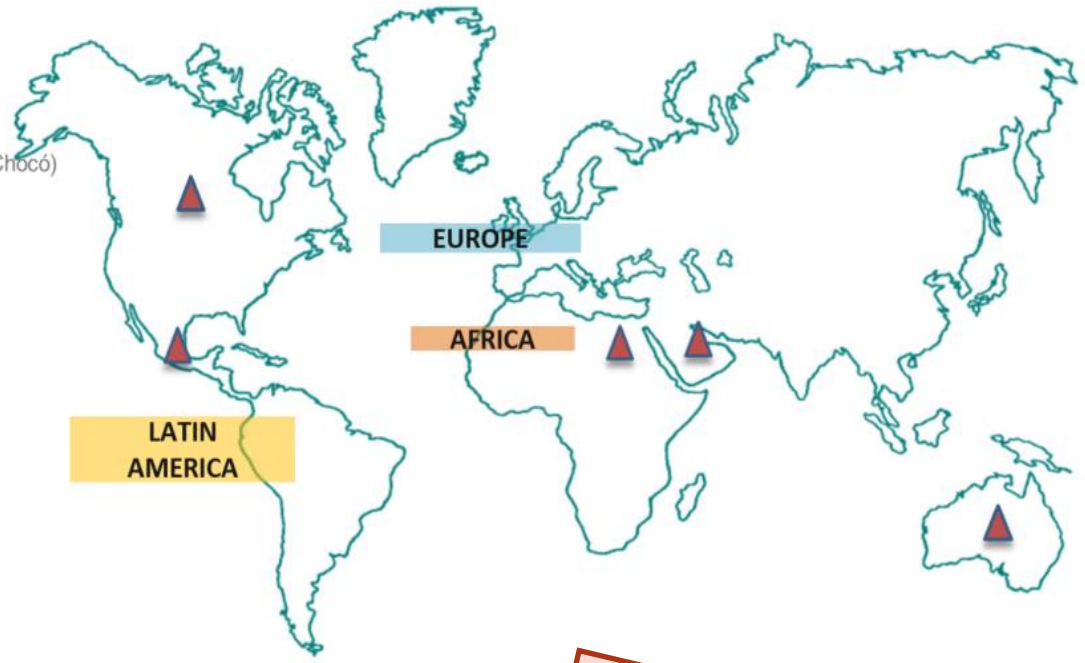
POLICY-MAKERS

Policy-makers who seek to diagnose which assets can be promoted to attract the aforementioned targets, and which key development opportunities can be exploited to promote inclusive, economic and sustainable development though the internationalisation of their region

A regional approach to attractiveness

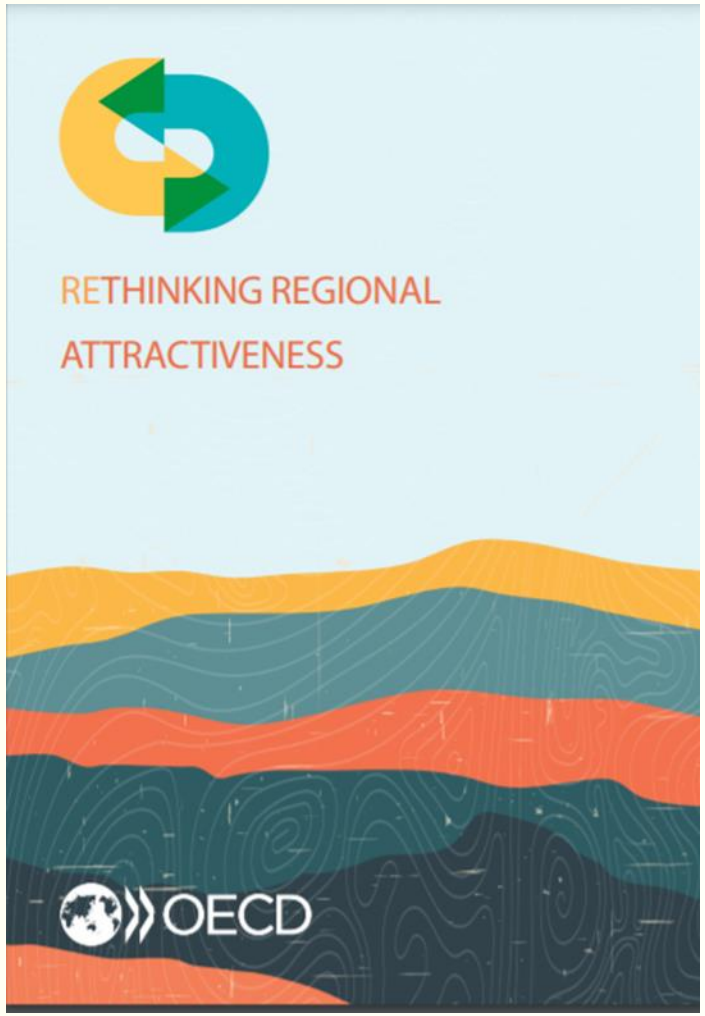
A Growing Community of Practice

Argentina	✓ Misiones
Chile	✓ Magallanes ✓ Valparaíso
Colombia	✓ Pacífico (Valle del Cauca, Cauca, Nariño, Chocó) ✓ Caribe (Córdoba)
France	✓ Grand Est ✓ Sud-PACA ✓ La Reunion
Ireland	✓ Northern and Western ✓ Eastern and Midland ✓ Southern
Italy	✓ Sicilia ✓ Liguria ✓ Marche ✓ Campania
Morocco	✓ Tanger-Tetouan -Al Hoceima
Portugal	✓ Algarve ✓ Metro Lisbon ✓ Centro
Spain	✓ Baleares ✓ Cantabria ✓ Comunidad Valencia ✓ Castilla y León
Sweden	✓ Dalarna ✓ Norrbotten



The Sud-Provence-Alpes-Côte-D'Azur in the world

Thank You!



https://www.oecd.org/fr/regional/globalisation.htm

Rethinking Regional Attractiveness Series

Making Ports and Logistics Networks an Asset for Regional Development

Irish Maritime Development Office

Liam Lacey
24 May 2022

Changing role of ports at national and regional level

What are the drivers of change?

1. Environmental concerns
2. Congestion at larger, hub ports
3. Indigestible parcel sizes (is the rise in parcel sizes inexorable?)
4. **Ports as energy hubs (offshore renewable energy and alternative fuels)**
5. Ports as hubs for business – building supportive eco-systems and clusters
6. Desire for balanced regional development

These messages are articulated strongly and clearly in the Atlantic Strategy

Regional ports as energy hubs

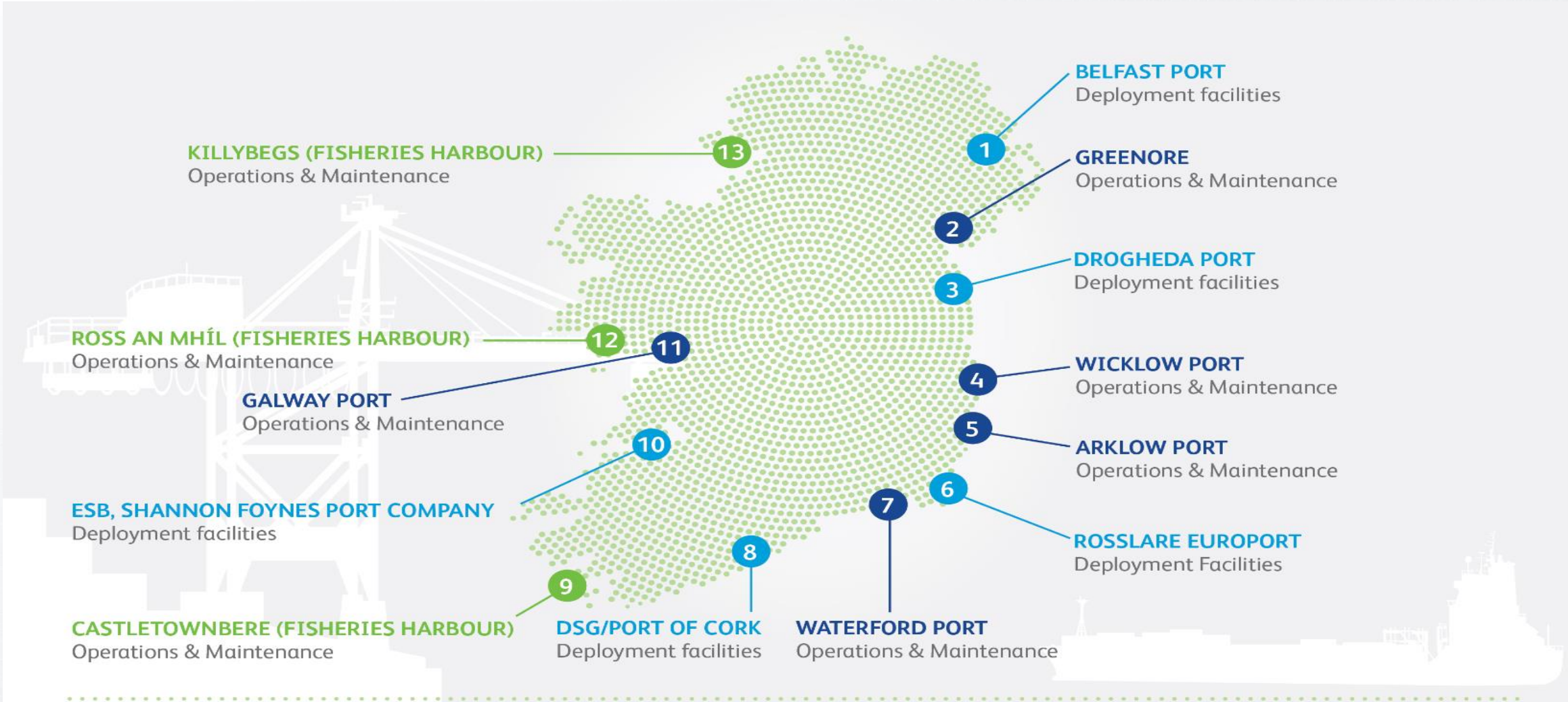
What do we mean by regional?

Need for different funding mechanisms

Port of Esbjerg - Denmark

Role of regional ports in offshore renewable energy

Natural resources are regionally dispersed



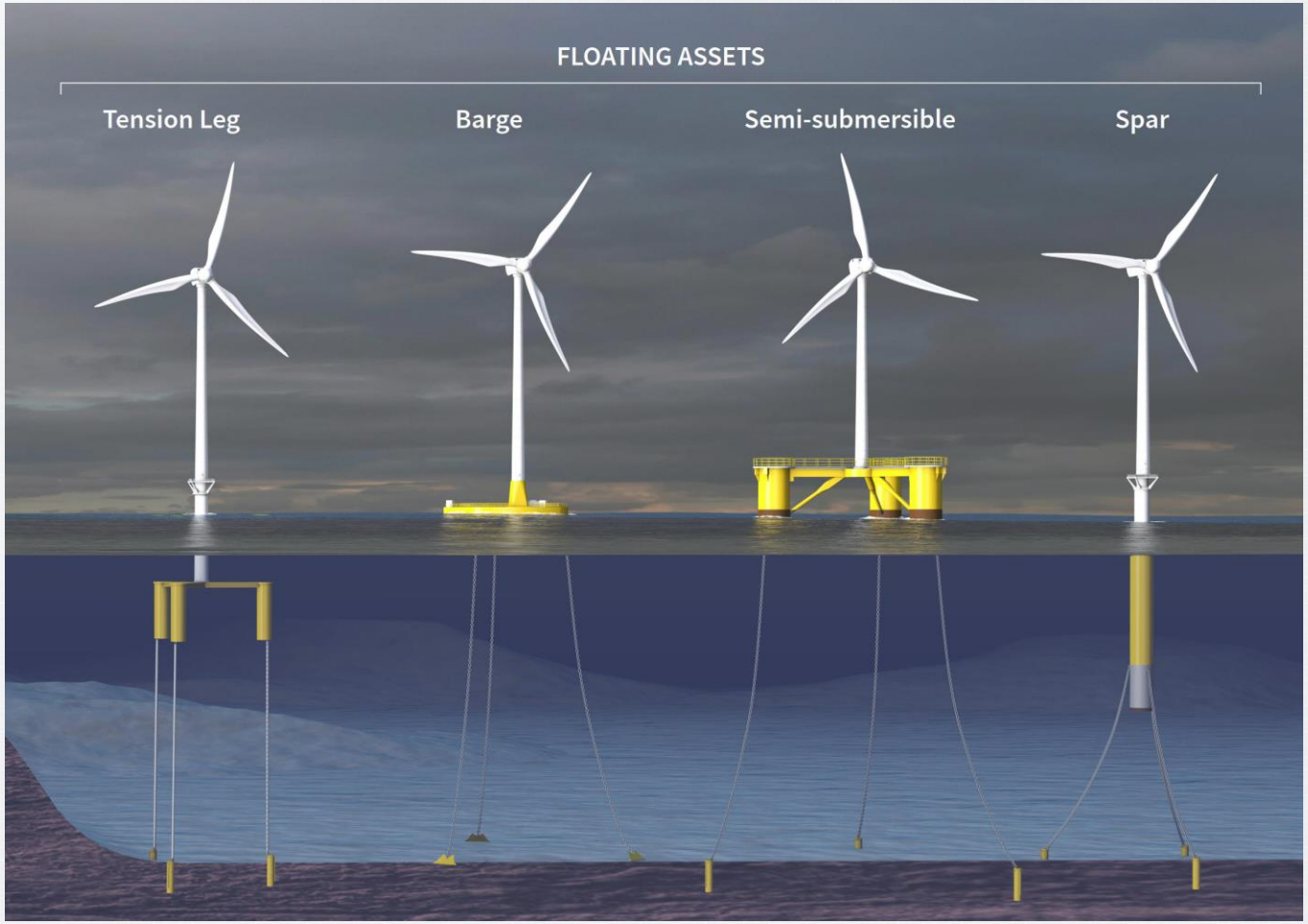
Notable lack of interest by Dublin Port

Irish Maritime Development Office

Role of regional ports in offshore renewable energy

Opportunities at all points in the value chain (floating wind technology)

1. Construction and deployment
2. Operations and maintenance
3. Supply chain
4. Ports as hubs for business
5. Choice of technology



Example of regional development
Atlantic Strategy (Action Plan 2.0 – 2019 to 2024)

The Atlantic Sea Basin – Ireland, France, Spain and Portugal

The main objective of the Atlantic Action 2.0 is to unlock the potential of blue economy in the Atlantic area while preserving marine ecosystems and contributing to climate change adaptation and mitigation. Its aims are in line with the global commitments for sustainable development

- A European Green Deal
- An Economy that works for people
- A stronger Europe in the world.

The development of regional ports is at the heart of the plan.

Specifically, the Atlantic Action Plan seeks to:

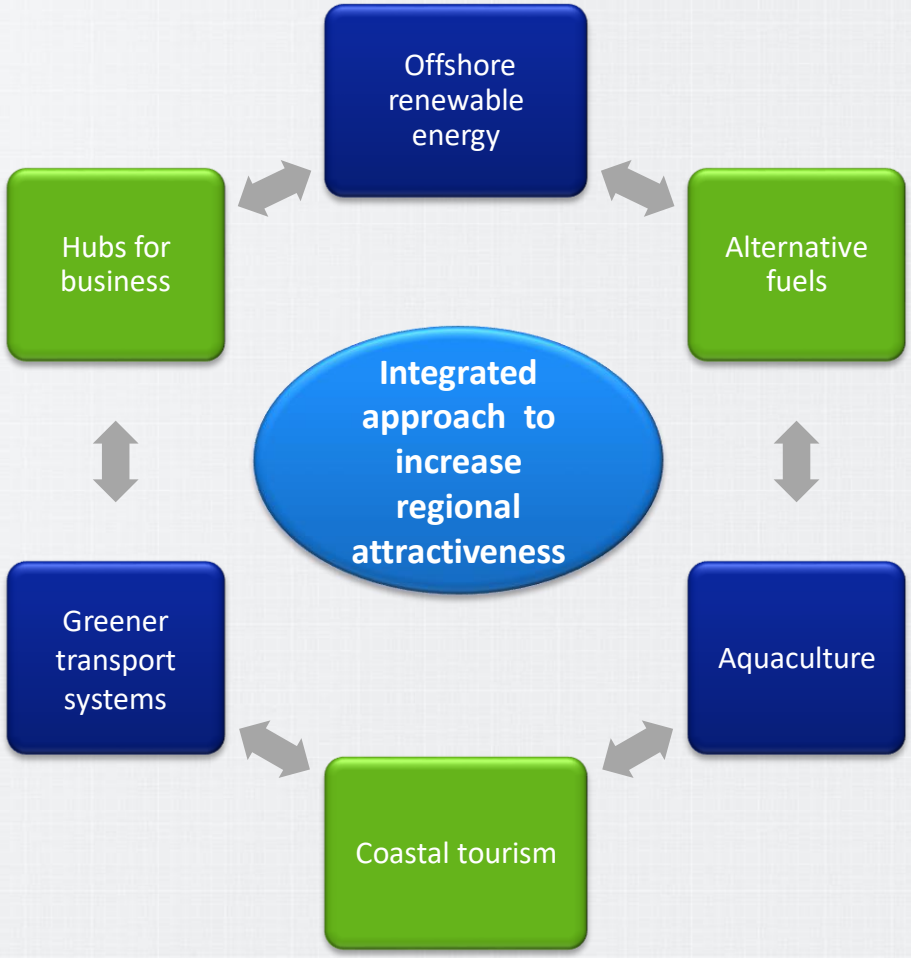
- Develop the TEN-T Motorways of the Sea in the Atlantic
- Create a network of green ports by 2025
- Foster short-sea shipping links in the Atlantic area to better integrate Ireland
- Launch an Atlantic strategy on liquefied natural gas
- Develop eco-incentive schemes to upgrade port infrastructure
- Jointly develop waste and handling plans for Atlantic ports

Ports Pillar - Roadmap

Charting a way forward – 4 priorities, all of which will support regional ports

Ports as hubs for business	Digitalisation	Connectivity	Green Ports
- Use ports as hubs for other industry sectors such as offshore renewable energy, aquaculture, coastal tourism, alternative fuels. **AspBAN Project**	Advance the digitalisation agenda to help facilitate green ports and connectivity. **International Fast and Secure Trade Lane project**	Connecting short sea shipping routes in the Atlantic. Develop a programme of actions to protect existing shortsea routes and foster new routes. **Ireland's response to Brexit challenges**	Development of best practice guidelines in the areas of port sustainability and alternative fuels. **Ealing Project**

An integrated approach to increase regional attractiveness, with activities focused on emerging sectors and a greener future



Thank you

Irish Maritime
Development Office

Liam Lacey
24 May 2022

OECD webinar on building ports and logistics and active networks for regional development

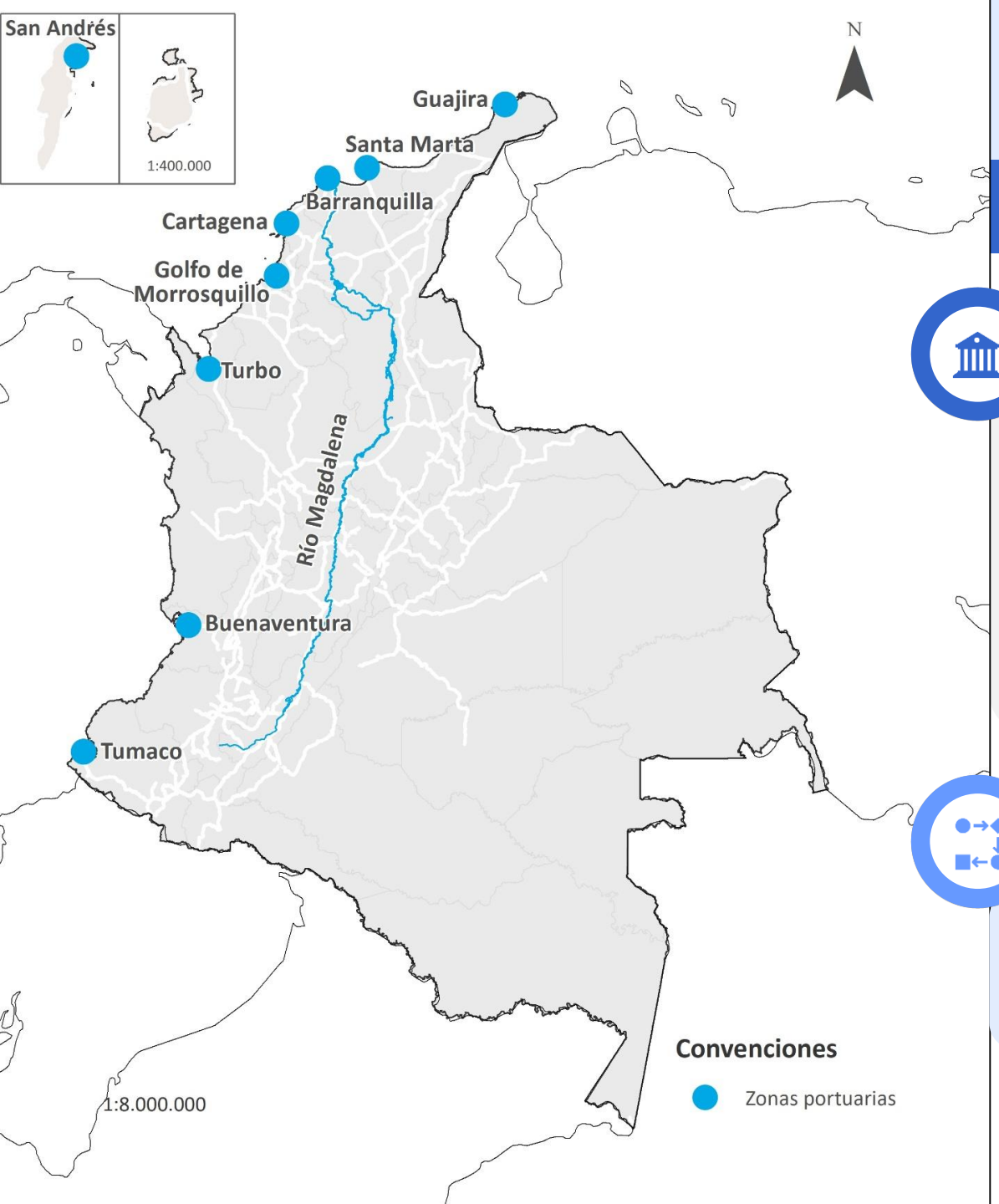
Jonathan David Bernal

Director of Infrastructure and Sustainable Energy of
the National Planning Department

May 2022

El futuro es de todos

DNP
Departamento
Nacional de Planeación



Port Policy beyond Expansion Plans

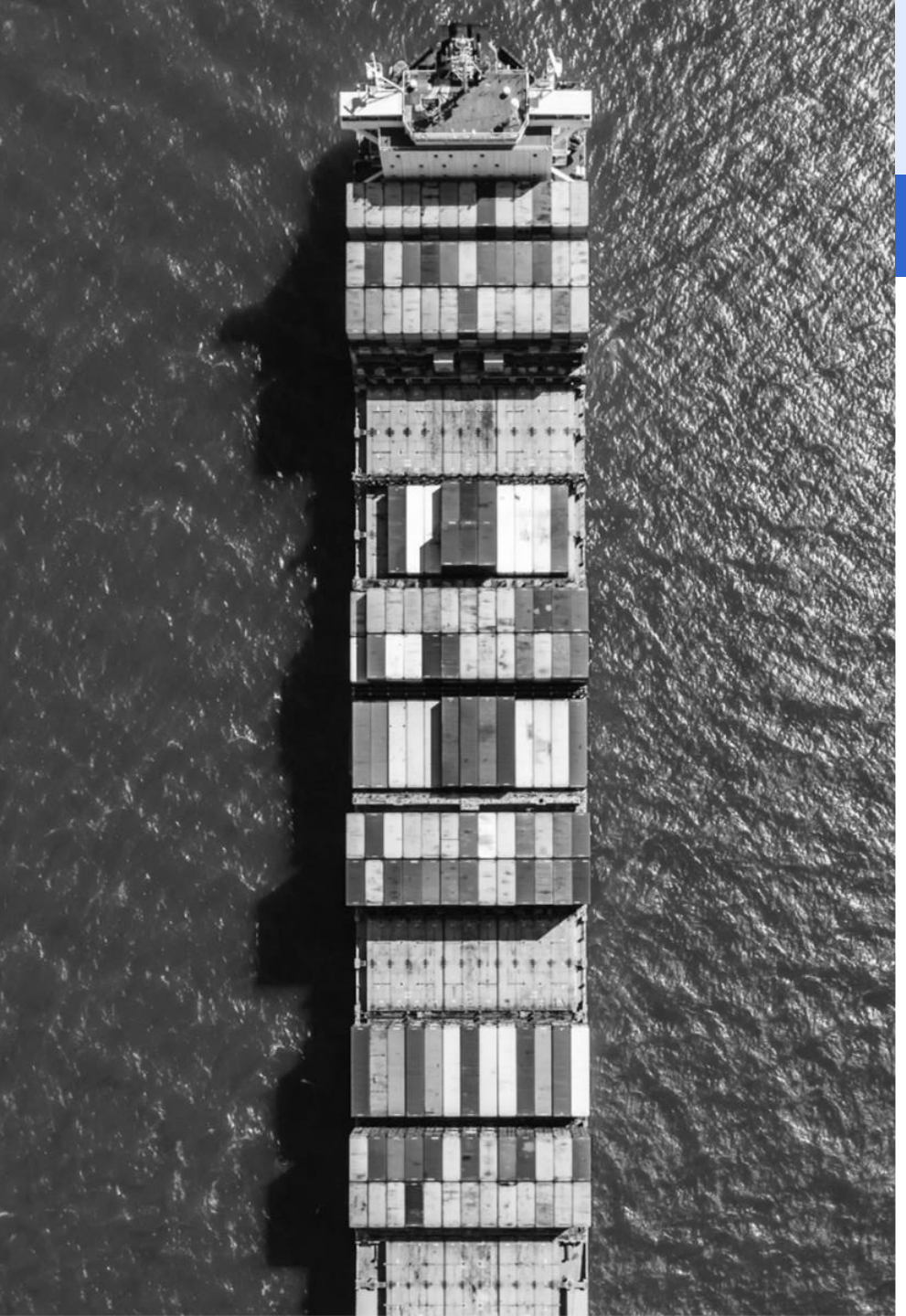
Requirements for the updating of the Port Public Policy:

Law 1 of 1991 includes the following elements of a CONPES for Port Expansion:

- ✓ Desirability of new investments in port facilities
- ✓ Possible new port areas
- ✓ Possible public investments
- ✓ Consideration guidelines
- ✓ Guidelines for defining port tariff conditions

Complementary actions:

- ✓ Institutionality and Efficient Governance
- ✓ Reconcession and reversal model
- ✓ Sustainable ports



Economic growth of the sector

Connectivity

1st in South America in index of connectivity to the global maritime network (UNCTAD*)

7th in efficiency in port services in Latin America**

Port traffic - Last three years ***

National

2019: 196,2 Mill Ton
2020: 166,2 Mill Ton — -15,3%

2020: 166,2 Mill Ton
2021: 168,6 Mill Ton — +1,4%

Z.P. Caribbean region

2020: 146,5 Mill Ton
2021: 147.4 Mill Ton — +0,7%

Z.P. Pacific region

2020: 17,7 Mill Ton
2021: 18,4 Mill Ton — + 3,7%

Main cargo mobilized***

1. **Bulk coal:** 36% (mainly in Ciénaga)
2. **Liquid bulk:** 27% (mainly in Golfo de Morrosquillo, Cartagena and Santa Marta)
3. **Containerized cargo:** 25% (mainly in Cartagena and Buenaventura)

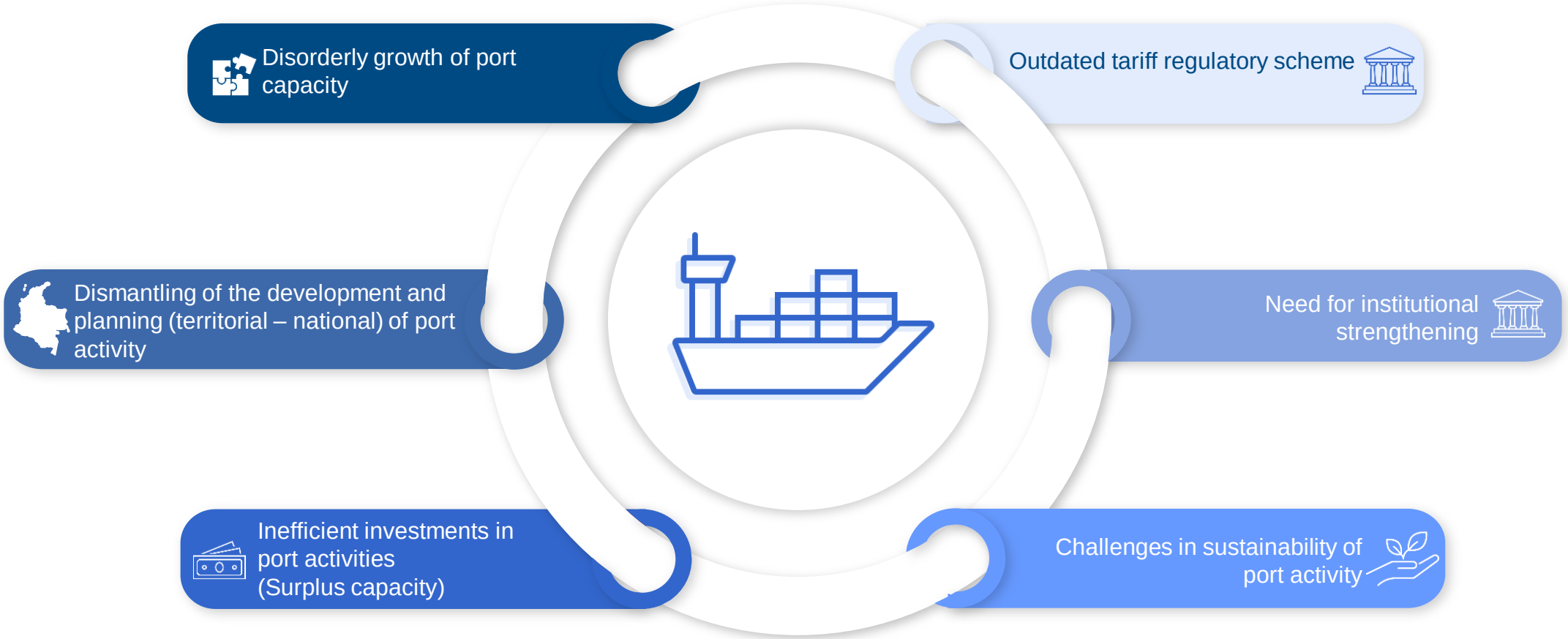
*United Nations Conference on Trade and Development 2021

** National Competitiveness Index 2020-2021

Port traffic 2021 (Supertransport Statistical Bulletin)

Justification

Port policy must address the problems identified:



Action Plan

Seven pillars are proposed for this policy:

Mainstay	Lines of action
Port capacity oriented to the development of the country and efficient use of the coastal resource	Efficient use of installed capacity
	Granting or modification of contracts
Articulated port planning Nation - Territory	Classification and definition of port roles
	Port master plans
	POFPA Update
Public and private investments for port development	Optimization of access to port terminals
	Investments for collection of compensation
	Private investments
Appropriate regulatory scheme to promote competitiveness	Tariff scheme
	Reversal processes and award of concession contracts
Port consideration methodology	Implement guiding principles
	Definition criteria for formula design
Strengthening the institutional framework and the port authority	Strengthening the port authority
	Sectoral and intersectoral articulation
Environmental sustainability	Preventive measures environmental component
	Management of social conflicto
	Climate change management

Buenaventura Port Area

The main port area of Colombia in foreign trade operations for products other than energy mining

Demand/capacity ratio per ZP by Load Segment (Base Scenario)
(2018 , %)

	CM	CT	CG	C	GL	GS	H
Buenaventura	34%	31%	30%	38%	75%	63%	1%
Tumaco						2%	33%
Total General	**47%**	**54%**	**33%**	**55%**	**42%**	**52%**	**36%**

C: Containers; **GS**: Solid bulk other than coal; **GL**: Liquid bulk other than hydrocarbons; **CG**: General Cargo; **CT**: Thermal Coal; **CM**: Metallurgical Coal; **H**: Hydrocarbons

Between 2010 and 2019, a total of **USD 2,653 million** were invested in areas of public use in Colombia, 44% in Buenaventura.

Component of connectivity – transport (Pacific road project of the plan Todos somos pazcifico– document CONPES 3847 of 2015.

Available port infrastructure

- ✓ 5 active port facilities for foreign trade and one under development (Port only).
- ✓ Port traffic 17.8 million tons in 2021
- ✓ Access channel 34 km long, Depth: 13.5 m. in the Outer Bay and 12.5 m. in the Inner Bay
- ✓ Capacity to serve post panamax vessels
- ✓ 3 specialized container terminals with 18 gantry cranes.

Special projects

- ✓ Double carriageway Bogotá – Buenaventura 517 Km, Saving in time 4.5 hours.
- ✓ Rehabilitation and operation of the Pacific railway network
- ✓ Structuring APP for access channel deepening
- ✓ Pilot project for the reuse of dredging material

Conclusions

The implementation of this policy expects to generate the following benefits:

Strengthening of the port authority and greater presence in the territory

INSTITUTIONALITY

Territorial planning articulation

TERRITORIAL ARTICULATION

Update of the regulations, rates and consideration

REGULATIONS

Consolidate **sustainable and resilient projects** in the face of **climate change**

ENVIRONMENT

A vision of **intermodality** with a long-term perspective - **Competitive ports**

INTERMODADLITY

PORTO DE SINES

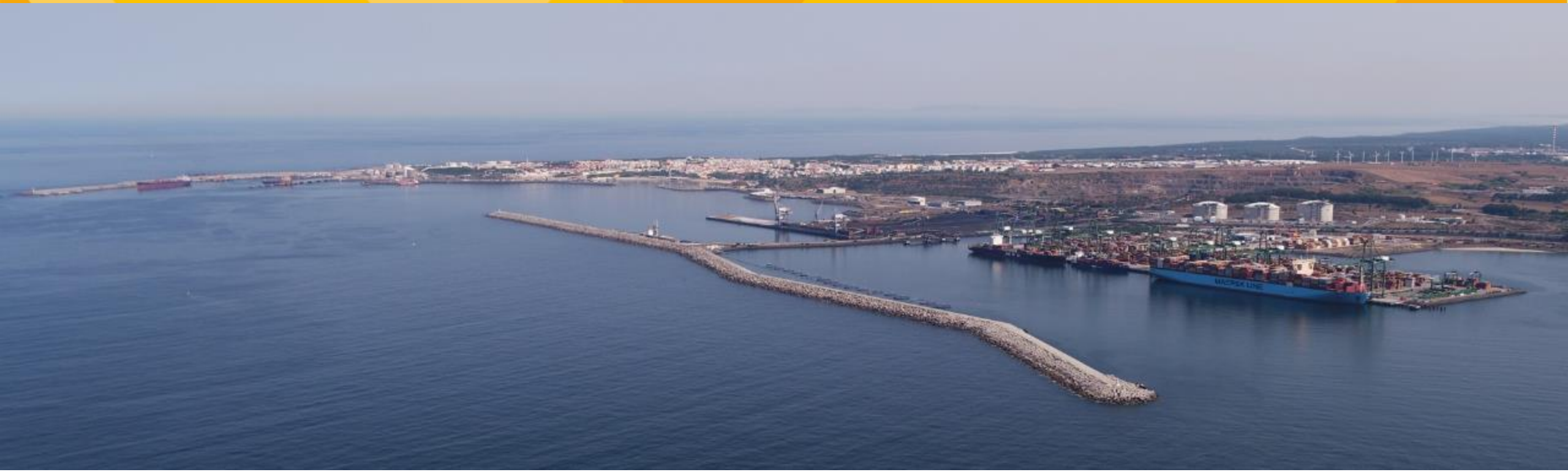
Port of Sines

Atlantic Gateway to Europe

Ana Rita Rosa
Communication

www.apsinesalgarve.pt

Port of Sines Characteristics



- Deepwater port (-28 m);
- Open sea port, with no maneuvering restrictions;
- Rocky bottoms with no need for dredging;
- Able to receive the largest vessels in the world;
- Specialized terminals for the handling of all types of cargo;
- No urban constraints, with expansion capacity in all the terminals;

APS Administração dos Portos de Sines e do Algarve S.A.

Highlights

NATIONAL LEADER

SINES HANDLES MORE THAN **50%** OF THE TOTAL CARGO HANDLED IN PORTUGAL BY SEA

INCLUDED IN INTERNATIONAL LOGISTICS CHAINS

SINES IS PART OF THE WORLD **TOP 100** CONTAINER PORTS AND EUROPE'S **TOP 15**

DIGITAL AND SIMPLIFIED

IN AVERAGE, THE AUTHORIZATIONS FOR BEGINNING THE OPERATIONS ARE GRANTED **2,5 DAYS** BEFORE THE SHIP'S ARRIVAL

INTERMODAL PLATFORM

THE PORT OF SINES OPERATES ABOUT

6.000

TRAINS PER YEAR

Strategic Goals

Port of Sines 2020-2030

Achieve **8%** share in the handling of Iberian ports with the hinterland. [Intermediate goal, 2025: 6%]

Caputure of Iberian Cargo

40% increase in the volume of cargo with origin/destination in ZILS/ZAL, excluding the energy sector.

Expand Activity of ZILS and ZAL

Lead stakeholder satisfaction, with a rating of **8** (on a scale of 1 to 9) on internal connectivity, port cost and flexibility.

Lead Stakeholder Satisfaction

PORTO DE SINES

Innovation, digital and green transition

NEXUS agenda

PORTO DE
SINES

APS | Administração dos Portos de Sines e do Algarve S.A.

Thank You

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www. apsinesalgarve.pt

UNIVERSITÀ DEGLI STUDI
DI GENOVA

The impact of ports on economic activity

Spillover effects in non port regions

OECD webinar series on Rethinking regional attractiveness in the new global environment:

Making ports and logistics networks an asset for regional development

24 May 2022

Anna Bottasso
Department of Economics University of Genova

- Most of studies analyzing the impact of transport infrastructure on different economic outcomes (trade, employment, GDP) suggest that such effect differs across transport modes and economic sectors.
- The productive effect of transport infrastructure investments tend to grow with the level of data aggregation.
- This result can be interpreted as evidence supporting the view that transport infrastructure networks generate significant positive spillovers across local areas.

In the case of Ports activity, possible interaction effects (spillovers) among different regions emerge when:

- GDP (or other economic outcomes) of one region may be influenced by GDP in other neighboring regions.
- Drivers of port throughput may depend on the economic activity in neighboring areas.
- GDP of one region may be influenced by port activity of other neighboring regions.
- GDP in different areas may be correlated because of unobserved characteristics that have similar effects in neighboring areas (spatially correlated).

- An increase or a reduction in economic activity observed in one area as a result of transport infrastructure investments might be at least in part driven by reallocation of economic activity across regions.
- The analysis of possible positive or negative spillover effects can shed some light on this issue in order to understand whether these variations represents a net positive effect or simply the by-product of the spatial or sectoral reorganization of economic activity.

Transportation Research Part A 65 (2014) 44–55

Contents lists available at ScienceDirect

Transportation Research Part A

journal homepage: www.elsevier.com/locate/tra

Ports and regional development: A spatial analysis on a panel of European regions

Anna Bottasso, Maurizio Conti, Claudio Ferrari *, Alessio Tei

DIEC – Department of Economics, University of Genoa, Via Vivaldi 5, 16126 Genoa, Italy

We analyze the impact of port activities (throughput) of the largest 150 ports belonging to 120 port regions on local development for a sample of 621 (TL-3) regions located in thirteen European countries and observed over the period 1998– 2009.

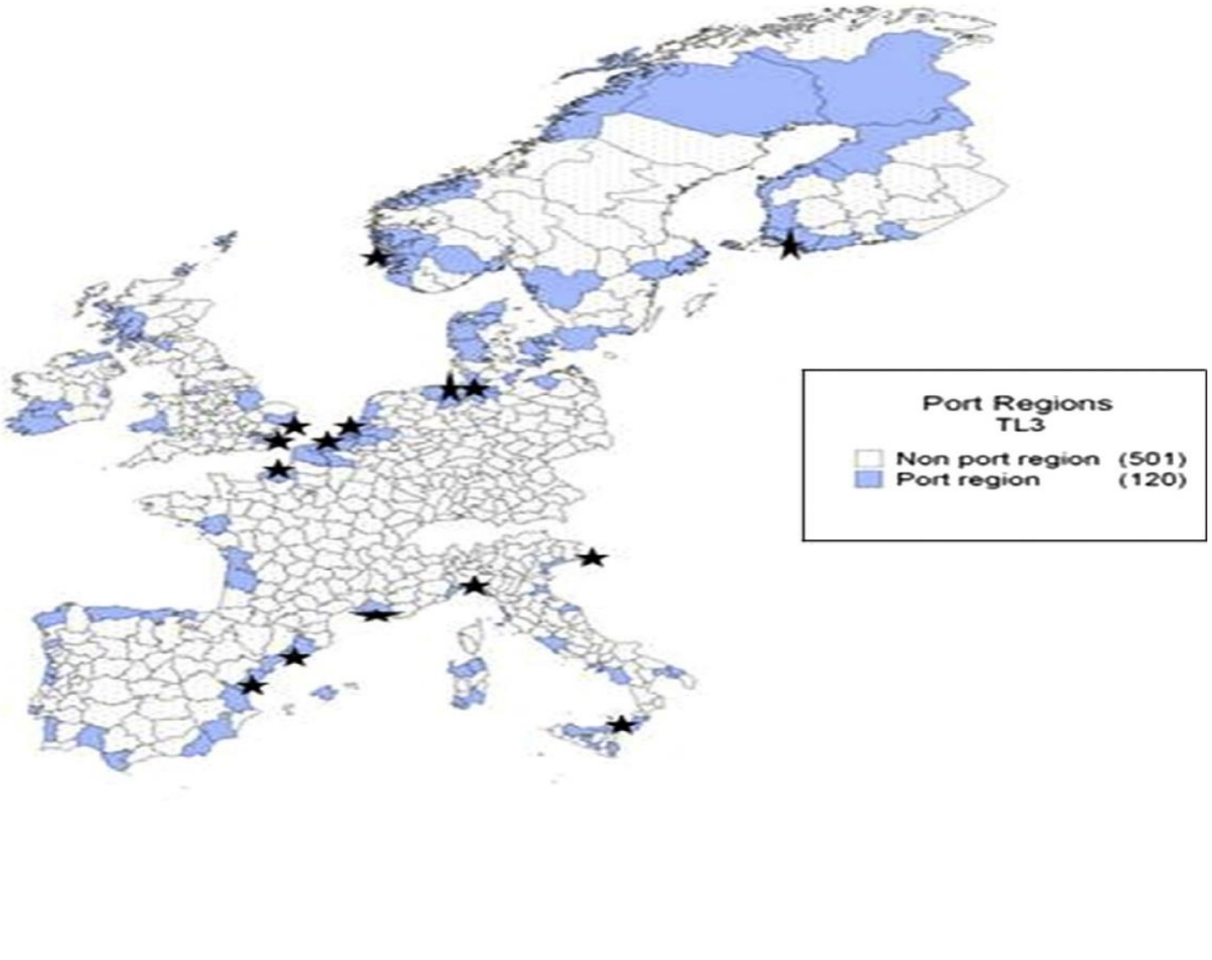

Fig. 1. Sampled regions. *Source:* Authors' elaboration. Black stars represent the location of main included ports.

- Results suggest that ports might have non-negligible effects on local GDP: interestingly, an important share of the effects takes place outside the region where the port is located thanks to positive spillover effects.
- Estimates of the direct effect suggest that an increase of 10% in the level of port throughput in a given region tends to increase GDP in that particular region by about 0.01–0.03%.
- An increase of 10% in the level of port throughput in a given region is associated to an average increase in GDP in all regions ranging between 0.06% and 0.2%, which in turn implies indirect spillover effects in the range 0.05–0.18%.

Transportation Research Part A 107 (2018) 126–139

Contents lists available at ScienceDirect

Transportation Research Part A

journal homepage: www.elsevier.com/locate/tra

Port infrastructures and trade: Empirical evidence from Brazil☆

Anna Bottasso[a], Maurizio Conti[a,b], Paulo Costacurta de Sa Porto[c], Claudio Ferrari[a,*], Alessio Tei[d]

[a] *Department of Economics and Business Studies, University of Genova, Italy*
[b] *European Commission, Joint Research Centre (JRC), Ispra, Italy*
[c] *Universidade Federal de Sao Paulo, Brazil*
[d] *School of Engineering, Newcastle University, UK*

We analyze the impact of port infrastructure (total quay or pier extension relative to area surface) on trade for 27 Brazilian states observed over the period 2009–2012.

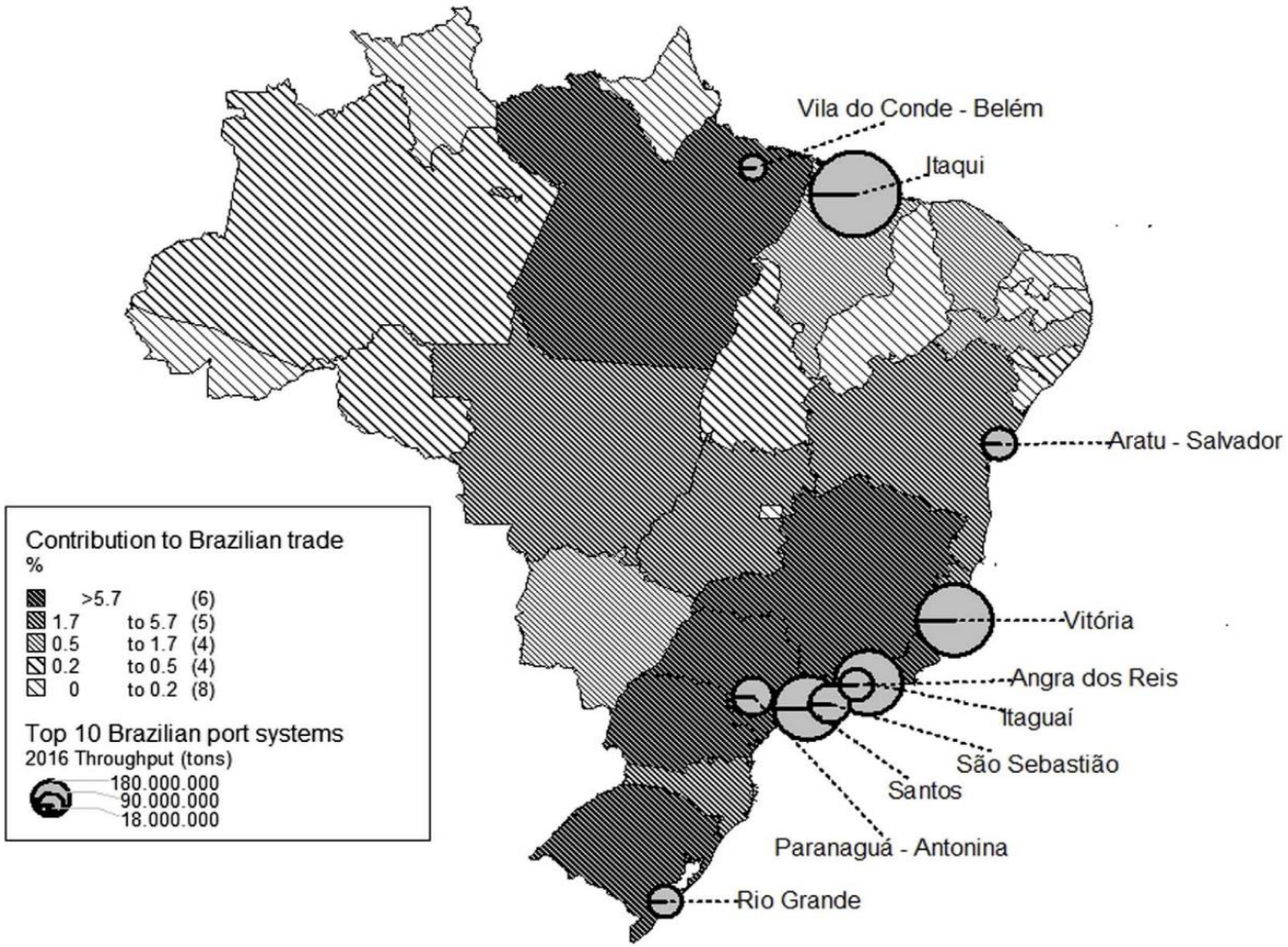

Fig. 2. Contribution of Federal States to Brazilian trade.
Source: own elaboration from ANTAQ data, 2017

- Infrastructure investments realized over the sample period have generated an increase of about 14% for export and 11% for import flows.

- Estimates provide evidence in favor of the existence of positive spillover effects of ports on landlocked regions.

Impact of port infrastructure on economic activity

- Arbues et al. (2015) do not find strong evidence for a significant effect of ports on productivity in Spain.
- Cohen and Monaco (2008) find evidence of a negative correlation between a state production costs and the stock of port infrastructure in that state for a panel of US states. The authors find some evidence of negative spillovers associated with the stock of ports in neighboring states.
- Cohen and Monaco (2009) do not find any correlation between production in the retail sector of panel of counties in California and the stock of ports, but find positive spillovers from neighboring ones.
- Fageda et al (2017) find that ports positively affect industrial employment of Spanish regions. Moreover, regions that benefit from having a large port, along with the regions located nearest to these port regions, obtain more employment in manufacturing activities without harming the other regions.

POLICY IMPLICATIONS

- Need for good connections among port regions and non port regions.
- Need for coordination of infrastructure investment projects across regions within the same country and across countries within a trade area.
- Need for internalizing positive externalities generated by port activity.

POLICY IMPLICATIONS

- Non-port regions might share the costs of ports infrastructure investments, since benefits tend to spread from port regions while costs, in terms of congestion, pollution, etc., have mainly a local nature.
- Non-port regions might participate in port governance.
- The rules of representations of general interests in the managing bodies of public infrastructures might be revised in order to account for a larger number of stakeholders.
- Need for a unifying regulatory framework.

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FRANCE'S NATIONAL PORT STRATEGY

Arthur Marronnier, PhD
Head of Development of French Ports
French Department of Transportation & Environment

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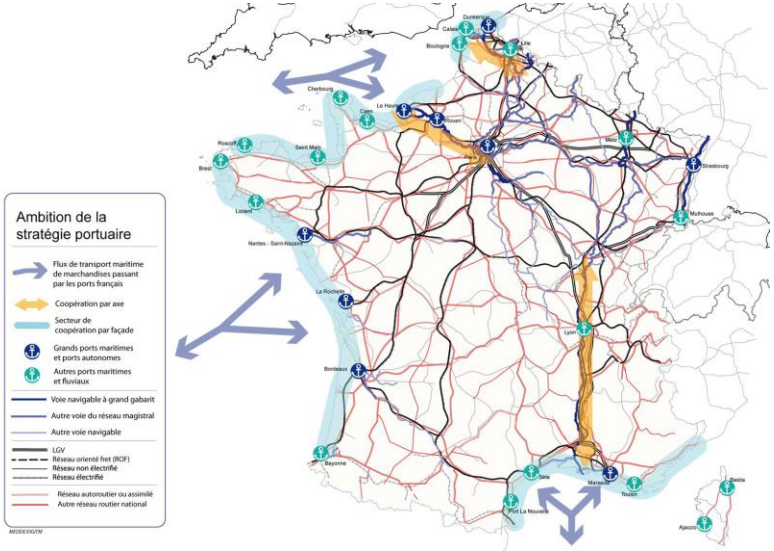
France’s National Port Strategy

- France is one of the centers of trade in Europe and at the crossroad of the world's major shipping routes (3 main entry points: Haropa Ports, Dunkirk, Marseille)
- Ports are ideal places for setting up new industrial and logistics activities
- They are at the heart of **regional** development and ecological and digital transitions



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France’s National Port Strategy (January 2021)

2030-2050 Goals

- Increase the share of containerized freight handled in French ports to and from France from 60% to 80% by 2050
- Double the number of direct and indirect jobs linked to port activity by 2050
- Increase the share of rail and waterway bulk transport in pre- and post-carriage port traffic by 30% by 2030

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France's National Port Strategy

4 strategic axes:

- **Ports as essential links in the performance of supply chains (towards smoother port transit)**
- **Ports as tools for the economic development of regions**
- **Ports as catalysts for the ecological transition** (alternative fuels, modal shift to waterways or railways, industrial ecology….)
- **Ports as drivers of innovation and digital transitions**

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France’s National Port Strategy

Ports as tools for the economic development of regions

- Develop new activities through dynamic land management, develop the port hinterland, interport cooperation, move towards a model of "entrepreneurial ports".

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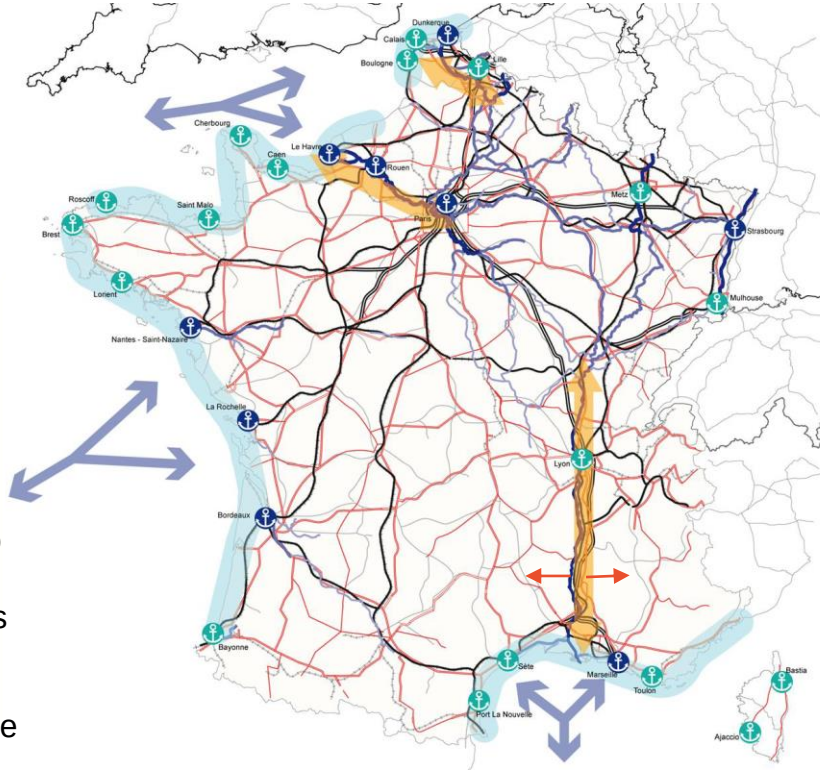
Fraternité

France's National Port Strategy

Ports as tools for the economic development of regions

Structuring of logistics corridors and development of mass cargo transport

- ➔ Our goal = shift the main maritime ports' attention from the shore side to their hinterland
  - ➔ Increase the share of French port on France's territory (gain of CO2 emissions)
  - ➔ Irrigate the connected regions generating new businesses
- ➔ Co-Investing in infrastructures with regional authorities (win-win relationship)
- ➔ 1 flagship example : merging Le Havre, Rouen and Paris ports into HAROPA PORT (June 2021) – 2020-2027 investment program of 1.45 G€; strong implication of the 2 regions in the governing bodies of Haropa and in cofinancing its projects
- ➔ Next step: better integrate Marseille in its hinterland (from Marseille to Lyon and beyond)
  - ➔ Identify 100 high potential and highly connected sites (railway, waterway) for new logisitic activities



MINISTÈRE
CHARGÉ
DES TRANSPORTS

Liberté
Égalité
Fraternité

Arthur Marronnier, PhD
Head of Development of French Ports
French Department of Transportation & Environment

Northern & Western
Regional Assembly

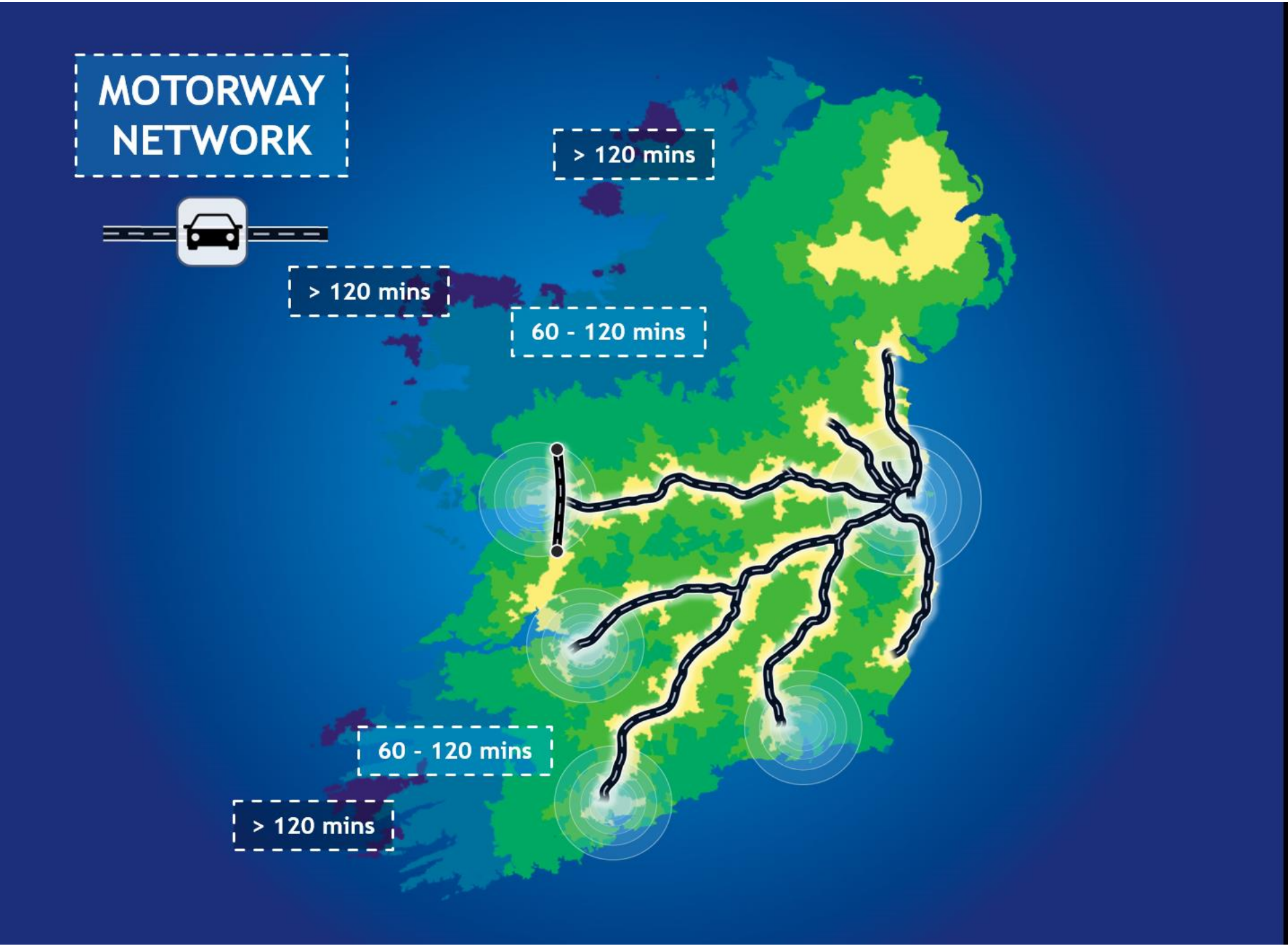
CRAFTING A VISION
FOR REGIONAL DEVELOPMENT

Framework for Dialogue on new Regional Spatial and Economic Strategies

@DavidMintondire
#ournwassembly

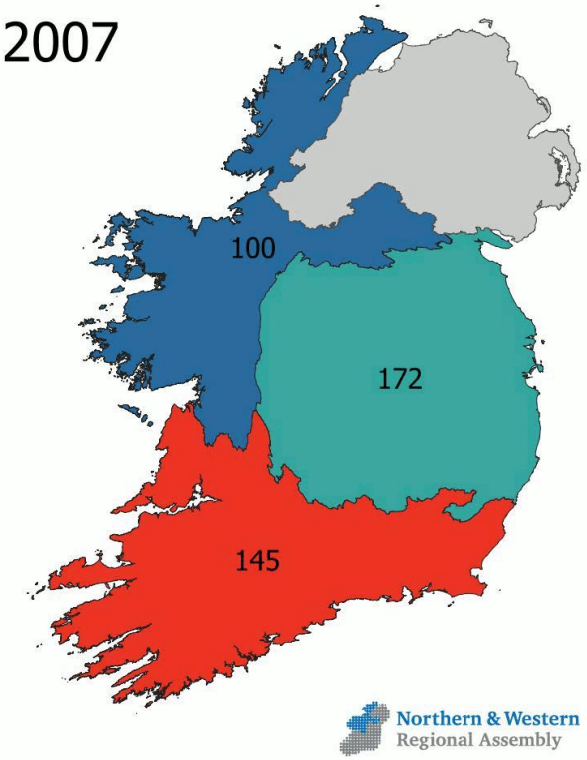
Ireland's European Structural and Investment Funds Programmes 2014-2020
Co-funded by the Irish Government and the European Union

European Union
European Regional Development Fund


MOTORWAY NETWORK
> 120 mins
> 120 mins
60 - 120 mins
60 - 120 mins
> 120 mins


MOTORWAY NETWORK
RAIL INFRASTRUCTURE
ELECTRICAL GRID NETWORK
GAS INFRASTRUCTURE
DERRY
ANTRIM
TYRONE
DOWN
ARMAGH
MONAGHAN
CAVAN
LEITRIM
SLIGO
LAOIS
WICKLOW
Ireland's European Structural and Investment Funds Programmes 2014-2020
Co-funded by the Irish Government and the European Union
European Union
European Regional Development Fund
Northern & Western Regional Assembly

Purchasing power standard (PPS, EU27 from 2019), per inhabitant in percentage of the EU27 (from 2019) average



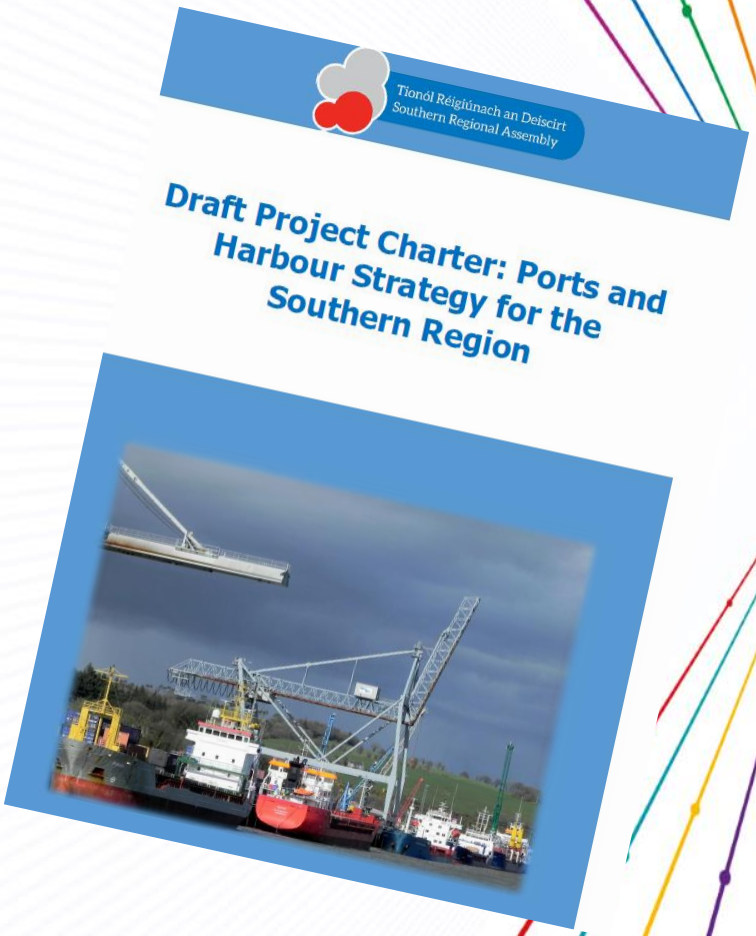
Northern & Western Regional Assembly

Galway Port Redevelopment


Commercial Fishing
Marine Tourism
Fish Processing
KILLYBEGS
MARINE CLUSTER
Marine Services
Marine Engineering
Renewable Energies
Aquaculture

Southern Regional Assembly

- Bring together main stakeholders in the port sectors in the Southern Region to focus and communicate the collective strength, capacity and opportunities of the Region's port and harbour assets on the EU Trans-European Transport Network (TEN-T), build resilience in our Region's and State's economic growth to deliver for:
  - National Strategic Outcome 4 High-Quality International Connectivity;
  - RSES Strategy Statement 6 High Quality International Connectivity; and
  - RSES Pillar for a Creative and Innovative Region.



Northern & Western Regional Assembly

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