



CLECAT

European association for forwarding, transport, logistic and customs services

European Logistics Policy

The Maritime Dimension

AMRIE's High Level Conference 2008

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Valencia

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CLECAT ESSENTIALS

1958-2008

CLECAT celebrates its 50th anniversary!

- **28 MEMBERS → NATIONAL FEDERATIONS**
 - Freight Forwarders & Logistic service providers national federations and confederations
 - Customs Agents national federations
 - Full, associated and observer Members
- **COMPANIES OF ALL KIND**
 - Global players, SMEs and regional operators, family businesses
- **NUMBERS**
 - Over 19.000 companies & Over 1 million direct FTE's
 - CLECAT covers almost entire EU & European continent
- **CLECAT actively participates in MIF transport-related activities**

Freight forwarding & logistic services

- Official CLECAT & FIATA description of FF services:

⇒ *Freight Forwarding and Logistic Services means services of any kind relating to the carriage (performed by single mode or multimodal transport means), consolidation, storage, handling, packing or distribution of the goods as well as ancillary and advisory services in connection therewith, including but not limited to customs and fiscal matters, declaring the goods for official purposes, procuring insurance of the goods and collecting or procuring payment or documents relating to the goods. Freight Forwarding Services also include logistical services with modern information and communication technology in connection with the carriage, handling or storage of the goods, and de facto total supply chain management. These services can be tailored to meet the flexible application of the services provided*

- Shippers and consumers in the driving seat

The value of logistics

■ Logistics in numbers*:

- Logistics costs = 10-15% of final product costs (transport, warehousing, inventory holding)
- Global logistics industry = USD 6,7 trillion/year or 13,8% of global GDP
- European logistics expenditure = USD 1,2 trillion/year or 13,3% of GDP

Maritime needs of the logistics industry

- The need: a port infrastructure able to cope with current and forecasted traffic growth
 - Challenges: Increase in volumes , bigger ships
 - Ports should not become a bottleneck!
 - Sustainable infrastructure development
 - *Avoid concentration of traffic at a few major ports*
 - *Strike a balance between infrastructure development and environmental constraints*
 - *The importance of hinterland connections*
- The policy responses
 - Guidelines on the application of environmental legislation to port development
 - Evaluation of EU hinterland connections (TEN-T policy)

■ The need: fair competition in port and maritime transport services

- Fair inter-port competition → State aid + non-EU ports
- Fair intra-port competition → no one-size-fits-all solution!
- A liberalised market for maritime transport services

■ The policy responses:

- Guidelines on State aid to ports + neighbouring policy
- *Guidelines on the application of competition law to port services: a missed opportunity??*
- Repeal of Regulation 4056/86 & upcoming guidelines on competition in maritime transport: a new era??

- The need: a simplified Customs and administrative environment
 - A proper single market for intra-European maritime transport
 - Single window for the fulfilment of Customs and administrative requirements

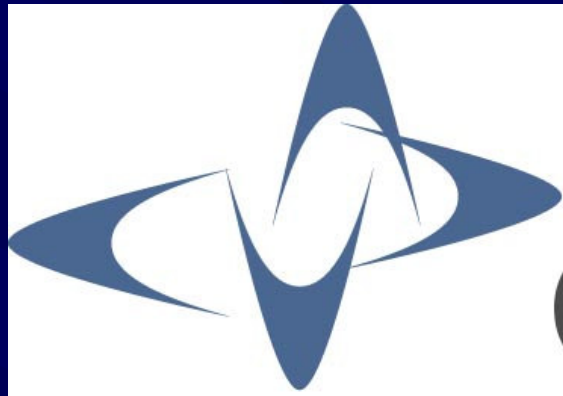
- The policy responses:
 - Towards a *Common European Maritime Space*
 - Creation of a paperless environment for customs and trade, including a single window for the submission of data

A few key principles

- The n°1 priority is port infrastructure
 - ☞ Allow for port development in the respect of environmental and social constraints
- Respect the diversity of local port situations in the EU
- Road transport is not the enemy but a partner!
 - Road & Motorways of the Sea: collaboration rather than competition
 - Modular concept: an opportunity for ports
 - Internalisation of external costs

Conclusion

- Commission's 2007 freight package:
 - A holistic approach rightfully focussed on logistics
 - A comprehensive assessment of the complexity and diversity of logistic services
 - A far-reaching set of actions & objectives
- BUT...
 - Logistics cannot (totally) make up for lacking infrastructure or unbalanced quality level of transport modes
 - Is the EU too ambitious in its objectives?



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www.clecat.org

Thank you!