



# Ports strategy and logistics challenges:

What are the levers for long term vitality?

Five guidelines for improving  
the competitiveness of French ports

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## **Towards a collaborative national ports strategy**

For over 15 years TDIE has taken a special interest in port questions.

There are many of these questions: they are about infrastructure funding, definition of the roles and resources of the different port actors, the linkage between port dynamism and landside transport systems, commercial strategies and the development of services to companies, and structuring the logistics supply. They raise issues of public policy that are increasingly complex. The economic changes brought about by the globalisation of trade, European integration, and the continuing process of decentralisation that began almost 40 years ago, have helped redefine the context of logistics systems. Ports are asked to play an ever greater role in that process.

The role of ports in the national economy is however poorly recognised. The fluctuations of the various types of traffic handled by French ports are just as much indicators of the attractiveness of our ports to shipping companies as they are of the industrial and commercial dynamics of our economy. They are at the junction of the increasingly-massified major world sea traffic flows and the continental logistics systems mobilised by industry and commerce.

### **At what scale should the ports strategy be defined?**

At what level should a ports strategy be drawn up? Should it be conceived and promoted by the State, or at port level, or through a sectoral approach? Should the ports authority take up this challenge by itself? How should the State coordinate the response of its various officials? How should the energies of the economic actors be linked to the investment and territorial development strategies of the public authorities? What role is there for the new Regions, which the NOTRe Act asks to engage in the logistics dynamic through their responsibilities for economic development and transport?

The diverse time scales and spheres of action must be given some coordinating focus in order to clarify the strategic projects being constructed around port systems. In this respect the State retains an important role which must be defined when the instruments set out in the recent reforms are implemented.

State policy on ports in the last 30 years was marked by two stages of decentralisation (1992 and 2004). The Ports Reform Act of 2008 was given more precision by the Act on the Blue Economy adopted in June 2016. The "Autonomous Ports" which became "Major Maritime Ports" (MMPs) possess instruments for developing a strategy on commercial expansion. They must now rise to the challenge of competition with European ports.

## **The territorial stakes of a port development strategy**

Behind the statistics on changes in traffic volumes handled by our ports, one observation is now compelling: the battle is played out on land, at the scale of the port hinterland. Our country must find the means to consolidate the hinterlands of its ports, and ensure coordination between the development strategies of the Major Maritime Ports and different public policies.

In 2015, TDIE undertook work on a contribution to the National Logistics Conference. It was natural to extend this discussion to that of port issues: the development of a logistics policy must be supported by a ports strategy decided and shared by the State and by territorial actors, by public authorities and by the professionals.

The Prime Minister and the Secretary of State responsible for Transport, the Sea and Fisheries have since then asked eight of our parliamentary colleagues to propose actions that would strengthen the economic and logistics activities of our seaboard ports and their hinterlands. The reports presented at the end of July emphasised the need for this coordination of public actors, while nevertheless showing the distinctive elements in the port and territorial dynamics of each port-hinterland grouping.

The debate is open. There are numerous proposals. We await the Government's response at a meeting of the Interministerial Committee on the Sea announced for November.

To contribute to the debate, TDIE's Research Council has proposed "five guidelines" to be published at the time of organising the Conference of 11 October entitled: "Ports strategy and logistics challenges: what are the levers for long term vitality?". To this current report is attached a documentary appendix; it is for all those who wish to familiarise themselves with the port and logistics problems of the moment, and will soon be available on the web.

We thank the working group of TDIE's Research Council which was busy for 10 months preparing these discussions with the Union des Ports de France. We thank warmly those who were willing to share their expertise and give up their time to our initiative through very rich hearings which have contributed to the content of these proposals.

Paris, 6 October 2016

**Philippe Duron**

Co-President Director of TDIE  
MP for Calvados

**Louis Nègre**

Co-President of TDIE  
Senator for Alpes-Maritimes

## Introduction

As the world's second largest maritime area, France can count 7 Major Maritime Ports on its mainland (Dunkerque, Le Havre, Rouen, Nantes Saint-Nazaire, La Rochelle, Bordeaux, Marseille) and 4 in its overseas territories (Guadeloupe, Martinique, Réunion, Guyane), plus about 50 so-called "decentralised" ports. France is the 5th largest European port power.

French ports are located at the interface between sea and land routes and integrated into multimodal transport networks. They are at the heart of the territories' logistics supply chains. They play a role in hosting the activities essential to growth in the logistics sector and contribute to industrial development, notably in the energy domain or in relation to the industrial sectors of the future. Port activities are a source of jobs and business.

Within the context of globalisation, including and perhaps even especially in times of crisis, vigorous French ports can play a strategic role in French external trade, as well as in maintaining and expanding industrial and logistics activities and international business on French territory. **In a word, the ports are tools of national sovereignty and should be chosen instruments for increasing territorial competitiveness.**

### **Which strategy for meeting the challenge of port competitiveness?**

French ports possess a multitude of advantages but still find themselves at the foot of the European port podium, far behind their Dutch, Belgian and German rivals.

The Act of 4 July 2008 on ports reform led to the unification and privatisation of port handling in order to refocus the role of port authorities on sovereign functions: strategy – notably commercial – in close liaison with the port community, and the management and organisation of the port area, as in the "landlord port" model.

Thanks to the implementation of this reform, French ports have been able to regain shares in traffic volumes since 2011 and present a more peaceful social image to the major world shipping companies. However, the recovery of container traffic is slow to emerge and, as the energy transition evolves, traffic in bulk energy products is now starting to decline.

Our working group's line of action was fostered by witness hearings of more than forty French and international actors in the ports sector whom we thank very warmly for their responsiveness and their contribution. They emphasised several warning messages by detailing the challenges with which our ports have to deal:

- Port actors have the feeling that port issues have been missing from the economic and political concerns of the public authorities. They regret this and sometimes criticise the absence of political weight given to port topics,
- Policies decided in favour of ports, as in the case of the National Strategy for Re-launching Ports published by the Ministry for Ecology, Sustainable Development and Energy in 2013, are not well known by port actors,
- Bureaucratic procedures, the cost of port transit, the poor productivity of port communities and the lack of multimodal infrastructure capable of servicing a broad hinterland were identified as the main challenges to French ports, and existed long before the 2008 reform.

In this context, several official initiatives saw the light of day in 2015 and 2016 of which the three main ones are: The National Logistics Strategy, which reaffirmed the importance of ports in France's logistics competitiveness; the Act on the Blue Economy promoted by a member of the National Assembly, Arnaud Leroy, which made specific and extended the aims of the 2008 reform, notably concerning the strengthening of the regions in the governance structures of the Major Ports; and the four parliamentary commissions for the maritime and port attractiveness of the Seine, Northern, Rhône-Mediterranean and Atlantic seaboard.

**It is now essential that the public sphere is mobilised in a more continuous manner to promote France's maritime ambitions. In this context, with the new competences awarded to regions in the Maptam and NOTRe Acts, local authorities are called upon to strengthen their involvement in invigorating the ports.**

**Ports are confronted with many challenges on which great efforts remain to be made: consolidation and extension of their hinterlands by reinforcing rail and river services, augmenting their commercial responsiveness by encouraging joint working between actors in the port community and, finally, simplification of procedures of all kinds.**

It is by rising to these challenges that France can increase its strength in the ports domain.

**The working group:**

**Antoine Frémont, Claude Gressier, Bernard Mazuel, Christina Peron, Pierre Van Cornewal**

**With Sonja Broëz and Pierre-Yves Rollin, rapporteurs.**

## Context and pertinence of the initiative

### 2016, a year dedicated to ports and the sea

The preparatory work on the national logistics strategy, presented to the Strategic Council on Attractiveness on 22 March and to the Council of Ministers on 24 March, marked the desire of the government to strengthen the attractiveness of logistics on the national territory. The ports were recognised as an essential link in this attractiveness.

In early 2016 the Prime Minister nominated eight parliamentarians to head four commissions tasked with identifying the issues relating to restructuring the hinterlands of the Seine axis (V. Fourneyron, MP for Seine-Maritime and C. Revet, Senator for Seine-Maritime), the Rhône-Mediterranean axis (F-M. Lambert, MP for Bouches-du-Rhône and E. Lamure, Senator for the Rhône), the Northern axis (J. Bignon, Senator for the Somme and R. Vandierendonck, Senator for the Nord) and the Atlantic seaboard (Y. Vaugrenard, Senator for Loire Atlantique and G. César, Senator for the Gironde). The MPs and Senators responsible for these reports submitted their conclusions to the Prime Minister in July 2016. Proposals specific to each seaboard, relating to infrastructure and services as well as the governance of French ports, were set out by the parliamentarians, with the aim of energising the seaboard of the French mainland and making them more attractive.

On 20 June 2016, the adoption of the parliamentary bill on the Blue Economy modified legislation on various aspects of the maritime economy including on ports legislation, unchanged since Act No. 2008-660 of 4 July 2008 concerning ports reform.

Finally, the territorial reform under Act No. 2015-991 of 7 August 2015 introducing a New Organisation of the Territory of the Republic (NOTRe Act) has provided the framework for the new regional executive institutions to take on port issues, with the redefinition of the boundaries of the regions' competences on transport and the economy.

Even more recently, the National Council on the Sea and Coastline (CNML), under the patronage of the Ministry for the Environment, Energy and the Sea, responsible for international relations on climate change, drew up a draft text entitled "National Strategy for the Sea and Coastline" (SNML). This text anticipates the government statements that will punctuate the meeting of the Interministerial Council on the Sea announced for November 2016.

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### Ports in the French economy

- 360 million  
France has the 5th largest ports sector in Europe, with more than 360 million tonnes of freight and 30 million passengers a year.
  - 11 million  
Its maritime zone, of 11 million km<sup>2</sup>, is the 2nd largest in the world, next to of the USA.
  - 35,000  
The land holdings of the Major Maritime Ports are estimated at 35,000 hectares.
  - 300,000+  
The overall maritime economy (fleet, ports, fishing, shipyards, State, research, etc.), excluding coastal tourism, generates more than 300,000 direct jobs in local labour markets.
  - 40,000  
Direct employment in the seven major mainland ports concerns about 40,000 people.
  - 90,000  
Industrial activities employ more than 90,000 people in the ports.
  - 4th European ports group  
Haropa, combining the ports of Le Havre, Rouen and Paris, is the 4th European ports group.
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### **The National Logistics Conference**

The result of a parliamentary amendment that was agreed unanimously, Article 41 of the Act of 28 May 2013 making various provisions in the area of transport infrastructures and services, asked the Government to take, before 31 December 2014, **"the initiative in organising a national logistics conference bringing together all the actors** and all the managers of equipment that enable flows to be organised in the sector as well as experts, in order to **carry out an analysis of French logistics provision, to determine the needs for the coming years and to consider the value of drawing up a national blueprint for logistics** *which could be an appendix to the national blueprint for transport infrastructure, and thereby identify priorities for investment and service in a national action plan for the logistics competitiveness of France. The Regions and the Metropolitan authorities would be invited to define and implement logistics action plans for their territory integrated with the national plan."*

A preliminary report, written by a research committee and entitled *La logistique en France: Etat des lieux et pistes de progrès* (Logistics in France: Current position and pathways to progress) was presented to the Secretary of State responsible for Transport in March 2015. It distinguished four possible pathways for improving the competitiveness of logistics in France (performance, skills and training, research and innovation, logistics and territories), for which various levers for action had been identified.

These four themes structured the organisation of a consultation of more than 500 socio-economic actors which took place in spring 2015. The consultation enabled the actors to express their expectations. State action was sought in three directions:

- Strategy and planning through proposing a medium to long term vision of logistics.
- Harmonisation of legislation with our European neighbours.
- Greater understanding and awareness of the discipline at national level.

### **A first meeting of the National Logistics Conference, 8 July 2015**

On Wednesday 8 July 2015, 300 actors in logistics met on the occasion of the first working meeting of the Conference. In his speech, Alain Vidalies endorsed four guidelines for the drawing up of a national logistics strategy for the next decade:

- **Optimise logistics flows and transport infrastructure;**
- **Enhance the attractiveness of the professions and expand training;**
- **Harmonise and simplify regulations;**
- **Prepare the logistics of tomorrow, for new business models, the digital transition and the energy transition.**

### **Presentation of the national strategy "France Logistics 2025"**

On 22 March 2016, logistics was the theme of the Strategic Council on Attractiveness chaired by the President of the Republic.

On 24 March 2016, the Minister for the Environment, Energy and the Sea, responsible for international relations on climate change, the Minister for the Economy, Industry and Digitalisation and the Secretary of State responsible for Transport, the Sea and Fisheries presented a **communication to the Council of Ministers concerning the strategy "France Logistics 2025"** and its four dimensions:

1. Climate and the energy transition. It recalled the Government's actions to support companies on this topic, with:
  - the programme for investing in the future which enabled a first call for projects in 2015 in favour of innovation in logistics and intermodal transport;
  - a second consultation would be launched by the Agency for the Environment and Control of Energy (ADEME) before the end of March, in collaboration with the National Federation of Road Hauliers (FNTR), on introducing service stations and lorry fleets using vehicles running on liquefied natural gas (LNG);
  - combined transport, which reduces the kilometres operated on roads to the benefit of rail, is being supported by the Fund for financing the energy transition;
  - the Act on Energy Transition for Green Growth envisages the deployment of infrastructure for alternative fuels over the whole national territory, notably in the ports (electric charging points, LNG pumps, hydrogen, biofuels).
2. Digitalisation. It insisted that logistics must take advantage of the advances introduced by the new technologies.
3. France Logistics 2025. This strategy's objectives are:
  - to improve communications with foreign investors and French exporting businesses;
  - to increase fluidity in the territory's port and airport entry gateways;
  - to enhance European infrastructure networks.
4. Economic development. There was, significantly, an announcement that a "dedicated coordinating body, comprising representatives from Parliament, the State, regional and local governments and socio-economic actors, supported by a logistics observatory and a new sectoral committee, will constitute the framework for dialogue on "France Logistics 2025". The mobilisation of the whole set of actors in the sector, each at their own level, will allow them together to rise to the challenge of organising a logistics which is both more virtuous and more competitive."

### **The Act on the Blue Economy**

The Act on the Blue Economy, adopted on 20 June 2016, derived from a draft bill promoted by Arnaud Leroy, MP for French citizens abroad.

It aims to improve the competitiveness of maritime operators and trading ports, as well as supporting sea fishing and aquaculture from the perspective of environmental protection.

Chapter 2 of Title 1 of the Act, headed "Renovate the governance of ports", is the principal section of the legislative text devoted to ports. It comprises 12 articles (Articles 20 to 31 of the Act on the Blue Economy), and enables notably:

- The strengthening of the Region's responsibility in the governance of Major Maritime Ports – whether they are consultative or decision-making institutions. The Region has in fact obtained an additional seat on the board supervising the MMP, and can also give its opinion on several posts within the port nominated by the State (President of the Directorate, individual experts on the Supervisory Board). Furthermore, the President of the Regional Council or his or her delegated representative chairs the Investment Commission created by this same Act;
- A deepening of the existing dialogue between the port authority and public and private investors, thanks to the creation of an Investments Commission within the Development Council of each Major Maritime Port. This Commission issues in particular its opinion on the investment projects decided by the Supervisory Board;
- An improvement in the internal control of each Major Maritime Port as well as in the information provided to the State, following the creation of an audit committee within each Supervisory Board. This committee must include at least one representative of the Region. Its tasks will be defined by the Supervisory Board, whose role it is to assist;
- The creation of an inter-port coordinating Council based on a single Major Maritime Port, whereas the 2008 Act reforming ports stipulated a minimum of two;
- The extension, to all persons, physical and corporate, of the right to reverse Import VAT.

The Act on the Blue Economy included in addition a wide raft of measures having as their goal the search for levers to growth in the maritime and port economy, which deal with, among other things, the cruise sector, as well as maritime safety and security, and marine fisheries and seafood cultivation.

#### **Four parliamentary reports on the attractiveness of French maritime gateways**

The Prime Minister launched at the beginning of 2016 four parliamentary commissions on the reinforcement of the attractiveness and competitiveness of France's main maritime gateways. The first concerned the Seine axis, the second the Northern axis, the third the Rhône-Mediterranean axis and the fourth the Atlantic seaboard. These four commissions submitted their conclusions in summer 2016.

#### **A few summary items:**

- The four parliamentary reports can be divided into two groups
  - The first brings together the reports on the Seine axis and the Rhône-Mediterranean axis. These **two reports mainly call on the State**, which is seen as the referee in promoting and sustaining a greater inter-port integration and enlarging the hinterland of their port communities.
  - The second comprises the reports on the Northern axis and the Atlantic seaboard. These **two reports invite the territorial authorities, and especially the Regions, to make full use of their new competences** in the economic and regional planning domains to play an increased role in developing the ports (governance, investment decisions, enlarging the hinterlands and promoting the ports). The Regions, in these two reports, are invited – at the minimum – to share responsibilities on these subjects with the State.
- **Some problems common to the ports led the eight parliamentarians to issue some common proposals** that they classified into three categories: simplification, future perspectives and cooperation.
- The organisational structure of each report exposed the issues specific to each axis, **thus their problems and recommendations are given different priorities.**
- Reading across these four reports enables some themes on national policy on ports to be set out, but also to identify the particular needs of the distinctive logistics and port systems of each of the four axes.

## Origins and method of TDIE's initiative

### Origins of the TDIE work

The association TDIE, in liaison with the Union des Ports de France, launched in the second half of 2015 a project on the issues relating to the ports strategy of France over the next few years. This work aimed to identify the levers for improving French ports and port communities, in terms of their attractiveness, productivity and competitiveness.

This time-consuming inquiry fitted into a sequence of previous projects by the association, which has given special attention to port questions since its creation in 2001.<sup>1</sup> TDIE organised in 2013 a conference on the theme: "Attractiveness of French Ports following the 2008 reform: what are the action paths?"; in 2015 the association's Research Council contributed to the National Logistics Conference. Finally, on 1 March 2016, TDIE organised a breakfast-debate at the Senate on the theme: "French ports, actors in the national logistics strategy".

### The working group

In carrying out this work, TDIE was supported by a working group composed of:

- **Claude Gressier**, Adviser to the Director of DGITM and member of TDIE's Research Council
- **Antoine Frémont**, Director of research at IFSTTAR and member of TDIE's Research Council
- **Bernard Mazuel**, Director General of the Union des Ports de France
- **Christina Peron**, Responsible for communications and information at the Union des Ports de France
- **Pierre Van Cornewal**, Director General of TDIE

**Sonja Broëz**, Project leader at TDIE and **Pierre-Yves Rollin**, Responsible for studies at TDIE, were designated rapporteurs of this current study.

### More than forty hearings and two study visits

Since January 2016, TDIE has carried out more than forty witness hearings of experts in the maritime and ports sector,<sup>2</sup> with a view to making an analysis of French ports.

The working group undertook two study visits: one to Le Havre in March and the other to Marseille in May. These visits provided the opportunity for dialogue with the multiple actors in these two major port communities and their hinterlands. With the aim of giving equal treatment to different sources of data, the TDIE working group also met with actors from other major ports as well as certain decentralised ports and, lastly, with a great number of private actors, both French and foreign: transport operators, shipping companies, freight shippers...

These hearings were carried out using a common interview format,<sup>3</sup> to which were added specific questions relevant to the profession of the witness. From the collection and analysis of the data received during these interviews, several conclusions emerged. They led to TDIE's five guidelines.

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<sup>1</sup> See the "Genealogy of TDIE's work on ports " in the appendix.

<sup>2</sup> See the list in the appendix.

<sup>3</sup> See the standard interview questionnaire in the appendix.

**Objectives of our approach: to raise awareness, to persuade, to mobilise ...**

- **government and parliament**, in order to increase awareness of the economic and political importance of ports, instruments of national sovereignty, and to stimulate a movement of support for ports.
- **the community of port actors**, in order to help bring points of view together to produce a collective dynamic.
- **economic actors**, in order to help them understand the importance of an area's port dynamics to industrial and logistics strategies.
- **citizens and taxpayers**, in order to arouse a new interest in the port question.

**... and thereby to encourage French port competitiveness**

With this current document, TDIE wishes to shed a special light on the question of port attractiveness, by putting forward its analysis of the position of French ports, as well as several proposals, to facilitate the public decision makers' understanding of the issues, ensure that the objectives of a national and territorial strategy are shared, and to persuade them of the need to ensure that there is a continuous effort in favour of port dynamism.

This approach hopes also to be informative. That is the reason for a dossier of briefing notes outlining the facts, figures and major debates on particular topics. The list of these notes can be found in the appendix to this text.

# Five guidelines

## for improving the competitiveness

### of French ports

**Note:**

In the following pages, TDIE has grouped the variety of proposals suggested by ports policy actors into five major guidelines.

To ensure that this selection can be compared easily with the proposals formulated by the parliamentarians in their commissions, the text collates the relevant parliamentary proposals at the end of each section or sub-section.





## 1. Integrate ports policy into economic and territorial policies: towards a renewal of national and regional strategies for ports.

**As tools of national sovereignty, the ports are instruments of national and territorial economic development.** France's maritime ambition is essential today for at least two reasons: first, and in the context of globalisation and of the European Union, including and perhaps even more so in times of crisis, dynamic French ports play a strategic role in French external trade, for the maintenance but also the expansion of industrial activities, logistics and international commerce on the French territory. Second, for the port areas concerned, port activity is a source of employment and business, in a word, of wealth.

Ports policy is a national and territorial issue. It is a long term challenge. Sharing the definition and implementation of the objectives of the national ports strategy with the local and regional authorities ought to encourage economic dynamism.

### Encourage the regrouping of ports by axes and seaboard

#### Evidence:

Competition is very strong between European ports. The ports of Rotterdam, Antwerp and Hamburg are the entry gateways to Europe. **French ports have hinterlands that remain confined to the national territory. They sometimes compete between themselves instead of being competitive against other European ports.** While competition is healthy in stimulating private business, it must not lead to a dispersal of publicly-funded investment, especially when the ports belong to the same regional grouping (whether seaboard or administrative region).

At a time when container traffic is ruled by new alliances of shipping companies, which evolve rapidly and deal with the majority of port customers, competition is played out at the Continental level. The economic efficiency of these alliances, which handle increasingly greater volumes, means in effect they function with an ever-decreasing number of ports of call. **French ports must react and strengthen their cooperation rapidly if they want to remain in the European race.**

#### Proposals :

1.1 Two principal axes dominate: the Seine axis and the Rhône axis. They enable hundreds of larger French cities to be served via a series of maritime and river ports, supplemented by major road and rail axes that are however often congested. The Seine axis is an integral part of the Channel/North Sea seaboard. Calais and Eurotunnel provide cross-Channel movements while Dunkerque is located very close to Zeebrugge and Antwerp. As for the Rhône axis, it belongs to the Mediterranean. The ports of the Atlantic seaboard allow a Greater West France to be serviced. **In a similar move to the regrouping of ports along the Seine axis into Haropa, it is proposed that the action of these ports be coordinated by axis or by seaboard.** The coordination could be done in a minimal fashion by combining the commercial, marketing and communication divisions for the international promotion of French ports. It could take on a more strategic dimension through the coordination of port investments. This coordination would first take place within the ports' perimeters. But it ought then to extend to the scale of the hinterlands with a triple objective: optimise investment in the area of

landside transport services, provide the land reserves needed for logistics activities and facilitate their accommodation in urban zones, and promote an overall vision of development that enables different uses to cohabit, including by enhancing the landscape and environment.

- 1.2 **Generalise the appointment of an inter-ministerial director** for each seaboard, as has been done for the Seine axis, which would give dynamism to port coordination and integration in a double rationale of economic competitiveness and regional development. It is a matter of facilitating economic, logistics and landscape coherence and promoting the port(s) and their hinterland as a whole.

### In the parliamentary reports:

#### Seine axis:

- General proposal: there must be a move away from the narrow logic of a single port community and a "silo" mentality to adopt a strategic vision of the axis as a whole.
- "It does not mean just modifying the governance of the ports, a topic largely explored in the debates on the "Blue Economy" Act. Nor giving pride of place to the region rather than to another local authority. No, the scale of change is quite different, it is that of the political ownership and incarnation of the Seine axis. It is that of a new architecture with aims for a new form of port growth: that of the axis."
- Recommendation 30: Require the body responsible for drawing up a strategy for the Seine axis to discard the port community by port community approach and reason in terms of traffic flows.

#### Northern axis:

- Proposal 2: Unite into a single entity, on the Haropa model, the four ports of the Côte d'Opale seaboard: the sea ports of Calais, Boulogne and Dunkerque on the one hand, and the dry port of Eurotunnel on the other, so they can join forces to promote the overall logistics and industrial attractiveness of the Hauts-de-France region in a cooperative way.

#### Rhône axis:

- Recommendation to the Prime Minister: modify the Act and regulation (L.5312-12) in the Transport Code to create the Mediterranean Inter-port Coordination Council in order to profit from complementarities between the port authorities, the port managers and the cargo ports of Sète-Frontignan, Port-la-Nouvelle and Arles, Port-Vendres, Marseille-Fos, Toulon and the ports of the Côte d'Azur. This Council could promote itself under banner Range France Med.
- Recommendation to the Prime Minister: create an "inter-ministerial director for the economic development of the Rhône-Mediterranean axis" based on an enlarged Medlink agency.

#### Atlantic axis:

- Axis 1: Steer a development strategy for the ports of this seaboard in a new way, sustaining it by involving the State and the regions, seconded by Europe.
  - o Proposal 1: Promote at European level an "Atlantic seaboard strategic project" ... by calling for Europe's participation through the implementation of the "Juncker Plan" to support investment in the modernisation of port equipment.

## **Increase the involvement of territorial authorities in the governance and economic and logistics development of ports while strengthening the linkage of the State-Region partnership into port development strategies**

### **Evidence**

With the ZIP (port-industry zones), ports remain major industrial sites in France, notably in respect of the energy, petrochemicals and steel-making sectors. The development of logistics business can also be considered an industrial activity which is necessary for the expansion of containerisation in fixing international transport chains on the national territory. In this way it enables industries present in France to be supported and sustained by reducing their logistics costs. Finally, it offers a spur to growth in the sea ports by stimulating new jobs and new revenues (taxes). It forms part of a virtuous circle of economic development. Despite the overall trend to de-industrialisation of the French territory, ports remain advantageous strategic tools for industrialising a territory and still represent the main entry gate for importing energy supplies. Moreover, ports possess sizeable land holdings.

**Ports thus have a prime role to play in the territorial planning of a regional territory, as well as its industrial and logistics development.** That makes cooperation between the regions and ports indispensable: ports can and must serve the logistics planning of territories.

**With the Maptam and NOTRe Acts, which gave the economic competence exclusively to regions, the latter are required to be involved increasingly in port economic development, as well as in expanding the logistics provision of their territory.** The recent Acts on territorial reform have in addition given the Regions instruments for planning their area (SRADDET, SRDEII,...) that they can call upon should they need to, to plan the ports and their hinterlands.

One other question to raise is that of the governance of the Major Maritime Ports, which was recently modified by the Act on the Blue Economy. **After the creation of an Investments Commission within the Development Council, the Regional Presidents will be called upon to chair it, and to play, de facto, a much bigger role in the ports in the near future.**

Four other elements introduced by the Act on the Blue Economy have helped clarify the governance of the Major Maritime Ports and made the increase in practical responsibility of the Regions reality:

- The Region has an additional representative on the Supervisory Board of the MMPs. It brings to five the number of representatives from the local authorities: that is, as many as the representatives from the State. There is thus parity between State and local authorities.
- There will be at least one representative of the Region in the audit committee of the MMP. That makes concrete the role of the Region in this body, institutionalised by the Leroy Act, which monitors the accounts and execution of the budget.
- The President of the Regional Council gives his or her opinion on the nomination of the Director-General of the MMP.
- The President of the Regional Council gives his or her opinion on the nomination of the experts proposed by the State to sit on the Supervisory Board.

**Proposals:**

- 1.3 **Generalise the partnership dynamic operating around, for example, the Seine axis and encourage their establishment:** following the NOTRe Act the regions have exclusive competence on economic development. It would be useful to incite actors on other axes to initiate and develop such approaches (for example, open up to actors from territorial authorities and extend the work of Medlink). The different parliamentary reports recognised the value of developing a Seine axis approach; the actors interviewed by TDIE equally expressed similar wishes.<sup>4</sup>
- 1.4 **Make use of local planning schemes and the instruments for regional forecasting and planning such as the Regional scheme for planning, sustainable development and equality of territories (SRADDET) or the Regional scheme for economic development, innovation and internationalisation (SRDEII), to support the regional work on ports:** draw up, in cooperation with the various tiers of government (State, Regions, even the Metropolitan Authorities), strategic logistics schemes on the regional or inter-regional scale – that go with the rationales of a port axis or a seaboard.
- 1.5 **Invite the Regional Presidents or their representatives to make full use of their function as chair within the new Investment Commissions introduced by the Act on the Blue Economy.** It means gaining the best possible understanding of the economic and territorial dynamics generated at the regional scale by port activities and helping to integrate logistics issues into regional policies.
- 1.6 **Associate the metropolitan cities with the debates on ports and logistics.** Flows of port traffic arrive in the metropolitan areas and/or leave from them. The organisation of transport access and of logistics zones within metropolitan areas is essential to improving relationships with the maritime terminals at the ports.

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<sup>4</sup> See Proposals 1.1 and 1.2.

**In the parliamentary reports:**

**Northern axis:**

- Proposal 6: Draw up a scheme for the development of port, logistics and industrial platforms at the regional scale.

**Rhône axis:**

- Recommendation to the future inter-ministerial Director for the economic development of the Rhône-Mediterranean axis: lead the drawing up of a strategic scheme for logistics zones and business zones in cooperation with Medlink, the France Med range, the State and the territorial authorities.
- Recommendation to the Prefect of the PACA region, to the Aix Marseille Metropolitan Authority and to the MMP Marseille: set up a partnership for economic development to share upstream analyses, decisions on priority sectors and coordinate the contacts with investors. This partnership should go as far as mobilising the Metropolitan Authority, in ways to be defined, on the development of the industrial-port zone of Fos.
- Recommendation to the Prefect of Auvergne-Rhône-Alpes: lead a collective drawing up of a guideline port scheme for the territory dominated by the Lyon metropolitan area, including the development of the industrial-port zone of Salaise-Sablons as well as an increase in the land dedicated to river transport at the Edouard Herriot port.
- Recommendation to the MMP Marseille: set up steering committees and technical committees for co-financed investment projects.

## Ensure the visibility, sharing and continuity of the National Ports Strategy

### Evidence:

The National Ports Strategy of 2013 derived from an initiative shared between the State administrations (planning, transport and industry) and the Port Directors. This strategy remains relatively poorly known on the French ports scene. **The port actors interviewed mostly did not identify with the actual ports strategy conducted by the State.** Thus, the recent parliamentary reports hardly mentioned, and sometimes not at all, the National Ports Strategy of 2013.

However, this strategy was already the bearer of two firm messages, to be found on several occasions in the demands of the actors interviewed by TDIE:

- The desire for **inter-ministerial working around ports**, favoured catalysts of topics on the economy, planning, industry, transport and logistics at the service of an "integrated policy".
- **A much greater involvement of the territorial authorities in the governance of ports**, at a time when the State is no longer the sole captain on board in terms of investments.

The National Ports Strategy therefore lacked visibility for port actors, who at the same time are raising the need for a strategic vision for French ports. Many demand a more strategic national vision of French ports, a vision which would consider ports to be instruments for economic and industrial development.

Consequently, what the ports strategy of 2013 could have been lacking was its production as a collective effort, and its promotion on the national and regional political scene. One solution for continuing now the work on this ports strategy could be to **reaffirm its messages within a refined ports chapter in the National Logistics Strategy "France Logistics 2025", in order to convey within this strategy the determination of the actors of a strategic State.**

On the other hand, and with the aim of promoting a real long-term strategy for French ports, the actors criticised the **weakness of the forecasting instruments for ports, which are bound by a too-short time frame and hinder French ports from producing a long term strategic vision.** Since the ports reform of 2008, port strategic plans must be produced every 5 years. Several actors argued for the relevance of a strategic plan covering 20 or even 30 years, readjusted every few years.

### **Proposals :**

- 1.7 **Encourage continuity and permanence in the interest of the State in national ports strategy:** taking into account their economic and logistics importance, ports ought to become a national concern of the first order.
- 1.8 **Increase the visibility of the ports strategy of 2013: this should be identified by the port actors, shared by the regions and brought in tune with the National Logistics Strategy in order to put the ports at the heart of the strategy "France Logistics 2025".**
- 1.9 **Pursue and amplify the guidelines of the national ports strategy of 2013 which proposed to ensure inter-ministerial working for greater cooperation between industry, transport and planning. Ensuring the regular holding of inter-ministerial and regional meetings** on port topics would allow, for example, the facilitation of interchange and coordination between the national, regional and port levels. It could also be useful to create a **High-level Ports Committee** bringing together the State, the relevant Regions and other local authorities as well as ports representatives to keep each up to date on the progress of the strategy, to share views on future prospects and carry out a regular evaluation of the implementation of their decisions.
- 1.10 **Extend the timescale and end date of ports' forward planning instruments – of the strategic plan type – to 15, 20 even 30 ans.** A period of action that is too short does not allow economic actors to project forward their stakes in long term investments. Port strategic plans ought to remain flexible and be conceived, as far as possible, over the long term.

### **In the parliamentary reports:**

#### **Northern axis:**

- Proposal 3: Create a compact governing body under the top-level oversight of the Hauts-de-France region and the State to steer a vigorous policy in favour of the expansion of port and logistics activity at the scale of the region and prepare the work of a regional ports conference which is to be introduced.
- Proposal 4: Introduce a national ports conference bringing together as a minimum the four regional port conferences.
- Proposal 11: Reconstruct a regional forward plan by sector, focused on maritime transport and logistics chains, and promote simultaneously a national forward plan for 2040-2050.





## **2. Reinforce the activity of port communities and the cooperation of port actors between themselves**

### **Evidence:**

#### **Some weak recovery of traffic since 2008 in the difficult context of the energy transition**

Despite the 2008 reform and the significant effort on investment carried out within the MMPs since then, **the pick up in container traffic is only slowly emerging**. The statistics since 2008 show that the market share of French ports has not improved; **the reality of ports traffic in France is not that of a recovery**.

Furthermore, to the evidence of a weakness in containerised traffic must be added the reduction in bulk energy traffic. The movement towards the energy transition as well as the expansion in refining capacity in both the exporting zones and in emerging economies is harming the competitiveness of European refining and raises the question of the end of "oil revenues" in the medium term.

**The reality of the movement towards the energy transition that has been initiated in Europe risks leading to consequences that are particularly severe in France because the business model of the national ports still rests essentially on the oil tanker traffic which enables the refining and petrochemical complexes to be supplied.** The Basse-Seine and the Rhone valley each concentrate 40% of French refining, for example. In addition, Le Havre enables EDF's power stations to be supplied, notably that at Porcheville where the ending of electricity production was announced for 2023.

Because of the slowdown in energy needs, **a concentration process of infrastructure and services is to be expected among the largest ports in the North European range**. A port like Rotterdam is questioning itself currently about its position in the energy transition and the consequences of that transition for its own traffic.

#### **A coordination deficit of commercial activities in the ports and port communities**

The French ports model suffers from a lack of commercial coordination of the actors in the port communities: citing the words of Paul Turret, Director of ISEMAR during our interview with him: **"French ports are more transit ports than commercial ports"**. Winning clients and traffic needs a business strategy matching the scale of the economic dynamics of the principal globalisation flows. This weakness of French ports is being overcome progressively with the introduction and work of commercial divisions, like that of the Haropa grouping, whose specialised team proposes business and marketing strategies turned towards the international market, and the attraction of new clientele. **This dialogue by actors within the port communities and by port communities between themselves, must be encouraged, and as far as possible, take place through the creation or strengthening of port groupings by axis and seaboard.**

The investment policy of ports also poses a question; it must be treated case by case, but with an overall vision of the ports as a whole, the French major ports each experiencing their own individual situation and, through their investment (Fos 2XL at Marseille-Fos or Port 2000 at Le Havre for example), having already undertaken some diversification of their port communities.

## **Proposals:**

- 2.1 Consolidate the commercial character of port communities.** The "commercial" character of ports depends above all on the private actors (handling companies, freight forwarders, forwarding agents,...), that is to say, the port community as a whole. The actors of this port community ought to be capable of "doing business" together, and with the goal of setting out together the overall commercial action of their port. The 2008 reform clarified and reinforced the roles of the port actors: the handling companies have become entrepreneurs capable of themselves attracting clients. The port has become a catalyst for helping to create a climate of confidence and commercial dynamism in the port community. In this context, one of the challenges for the port authority is to succeed in mobilising the various economic actors of the port community around a commercial strategy. To strengthen these provisions, it is recommended to take a lead from the Act on the Blue Economy which expands the presence of private actors in port dynamics via the creation of an Investments Commission within the Development Councils of MMPs.
- 2.2 Introduce a collaborative approach by sector:** reasoning in terms of the goods transported helps to prevent the dispersal of flows and to structure the competition between European ports. This approach can also be extended to servicing the hinterland: one of the roles of the port community could be, on the one hand, to contribute to the forward thinking about infrastructure investments to be planned for the port and, on the other, to develop a culture of shared risk when launching innovative services (rail and river shuttles towards the hinterland for example).
- 2.3 Put in place a national strategy and regional strategies for the energy sector** that take account of its importance in port revenues and that take account too of the substantial changes expected in the context of the energy transition.
- 2.4 Think in terms of services more than of infrastructure,** to help the growth of container traffic. Even if the recovery of traffic lacks dynamism, the cycle embarked upon by French ports since 2008 is positive: consolidation of the Seine and Rhône axes, development of logistics parks, growth of 3% in containerisation in 2015, very high capacity port infrastructure, and so on. A focus on the commercial policies of ports is therefore recommended rather than on investment in port infrastructure, which has already been undertaken and which at present, and in the opinion of a large majority of actors we met, is as advanced as in the ports in Europe's Northern range.

## **In the parliamentary reports:**

### **Seine axis:**

- Recommendation 30: Require the body responsible for drawing up a strategy for the Seine axis to discard the port community by port community approach and reason in terms of traffic flows.
- Recommendation 31: Associate economic circles more closely in the Council for Inter-port Coordination of the Seine.

### **Northern axis:**

- Proposal 11: Reconstruct a regional forward plan by sector, focused on maritime transport and logistics chains, and promote simultaneously a national forward plan for 2040-2050.

### **Atlantic axis:**

- Axis 1: Steer a development strategy for the ports of this seaboard in a new way, sustaining it by involving the State and regions, seconded by Europe
  - o Proposal 3: Really engage in ambitious and coordinated action, using: commercial approaches to the deep hinterland areas; joint analyses of logistics and industrial business sectors, shared analyses and strategies for the three ports to prevent an excessive dominance of the beneficiary operators over one or more terminal agreements; joint analyses of investment priorities for each port.
  - o Modify the arrangements for the current CCIA (Committee for Inter-port Coordination of the Atlantic) i to make it an essential, effective actor and explore the following paths: confer the status of a GIE on this coordination and organising body as for the Seine axis, reinforce its role by making its intervention or opinion indispensable, in practice, to a certain number of processes (large investments, attribution of terminals, approval of the port chapters of the State-region plan contracts,...). It would be desirable in addition for all the commercial ports on this seaboard to be associated with this common action, in particular Brest, Lorient, Bayonne, etc.



### 3. Strengthen the business model of French ports

#### Evidence:

The world economic crisis of 2008 did not fail to affect European and French ports, explaining in part the difficulty in returning to pre-2008 levels of traffic. To that must be added the overall trend to de-industrialisation on French territory and the energy transition in Europe. But despite this tendency, ports remain strategic industrial sites. The energy sector is very widely present on them; they possess sizeable land holdings. Ports are strategic tools for economic development.

However, **French ports suffer from their modest capacity for self-financing and volumes of investment, as well as substantial debt.** Furthermore, State contributions to the running of ports and port investments are declining year on year. For all these reasons, **the business model of French ports must be strengthened.**

This state of affairs notably concerns the dredging of port access channels: the State, according to the Act No.65-491 of 29 June 1965 creating the autonomous maritime ports, must ensure access channels to French ports. **Today the State provides a little under 50% of the funding for access channels** and this share decreases a little more every year. The loss of revenues due to the shortfall in State funding for dredging amounts to 38% of its cash flow for Le Havre; 50% for Rouen. In comparison, the Flemish government provides 100% of the dredging of channels at its ports of Zeebrugge and Antwerp.

The actors interviewed also mentioned several other ways in which the French ports business model was dysfunctional:

- **Administrative and customs procedures when entering ports are not sufficiently harmonised and can appear too complex.** The administrative burdens for a shipper of goods passing through France are much greater than when passing through the Netherlands or Belgium, and can explain why many goods – destined for the French market – could go off to other European ports such as Antwerp. For example, it took 8 years to align VAT reverse charging – a practice which allows shippers to make considerable cash flow savings – on that at other European ports.
- **The port duties levied seem high.** In terms of infrastructure, French ports have the capacity to provide a service at least as good as other European ports but for a higher price levied at the time of entry into the port; in other terms, for a shipping company or shipper of goods, the value for money of a French port seems less attractive than that of a port like Rotterdam, Antwerp or Hamburg.
- **French ports need to keep a flexible fiscal framework.** The exoneration from corporation tax for French ports must be retained. As far as annual property tax is concerned, a solution must be found that is economically viable for the Major Maritime Ports, as for the decentralised ports.
- Finally, **ensuring a competitive business model occurs through introducing and sharpening productivity indicators because much progress needs to be made in this area, and also in forecasting and in monitoring commercial activities:** Key Performance Indicators (KPI), analytical accounting, financial trajectories, productivity...

**Proposals:**

- 3.1 In liaison with the regions and port public bodies, the State must **draw up a plan for modernising investment** with a timetable of at least 10 years in the light of a forecasting study for 20 to 30 years ahead. The timetabling should relate to port investments directly and to those concerning services in the hinterland.
- 3.2 **Raise the State contributions to port dredging to 100%** of the needs of Major Maritime Ports.
- 3.3 **Introduce monitoring of the Act on the Blue Economy to evaluate the effectiveness of simplifying the procedures inaugurated by the reverse charging of VAT and the European single customs office.** Care must be taken that reverse charging of VAT is applied in similar conditions to those of competitor ports.
- 3.4 **Adapt the fiscal framework to which ports are subject**, through corporation tax or property tax for example, to guarantee their competitiveness, at a time when half the member States do not subject their ports to corporation tax.
- 3.5 **Give the reduction in port charges – also called port duties – a time-frame common to all the French Major Maritime Ports.**
- 3.6 To supplement the Key Performance Indicators (KPIs) of port companies, introduced some years ago in the MMPs, **encourage the establishment of productivity indicators that measure the economic and commercial effectiveness of the MMPs** (traffic/employee or turnover /employee).
- 3.7 **Invite the ports to enhance the value of their property portfolio and derive revenues from a product in strong growth to re-establish a viable business model on a healthy basis and in order to be able to reduce port duties.** Land holdings policy can constitute a stimulus to growth in port revenues; new business activities should be found to improve the financial situation of ports, and one of these activities lies in the management of ports property. A ports property strategy could enable, on the one hand, new revenues to be found; and on the other, encourage ports to engage in business forecasting and marketing. **Parliamentarians and ports ought to be associated with the government's discussion on the reform of the law on public property.**
- 3.8 Even though Customs have made enormous efforts to smooth and simplify port passage, they must prepare themselves to **meet the challenge of the Union Customs Code (UCC) in such a way as to give French ports a good position in European competition.**

## **In the parliamentary reports:**

### **Seine axis:**

- Recommendation 6: Confirm the responsibility of the State for dredging access channels and estuaries, as well as for maintaining external protection works and sea locks in order to avoid the categorisation of its financial intervention as State aid.
- Recommendation 14: Free up budgetary resources to bring State intervention in dredging access channels and estuaries, as well as in the maintenance of external works and sea locks to the level provided for by Articles R5313-69 to R5313-76 of the Transport Code. Require the MMPs to reduce their port duties in due proportion.
- Recommendation 11: Check that the application of reverse VAT charges operates in conditions similar to those in competitor ports, or even more favourably, while ensuring the risk of fraud is avoided.
- Recommendation 12: Extend to MMPs the exoneration of property tax that applies to Autonomous Ports. Compensate the local authorities for the loss of the relevant receipts.
- Recommendation 13: Look for ways of reducing the field of application of corporation tax on companies, which the European Commission requires to be introduced. Draw the consequences for the level of dividends demanded from port entities.
- Recommendation 20: Carry out a benchmarking study of the productivity (including of staff) of MMPs in France and their main competitor ports in neighbouring countries.
- Recommendation 22: Check that the application of provisions in the Ports Code that permit persons belonging to the unified collective convention of dock handling to hold a monopoly over employment is still within the letter and spirit of these provisions.
- Recommendation 25: Widen the field of action of the Haropa Group; in particular, give it the role of making coherent both the charging strategies for port duties in the two sea ports and the land holdings strategies of all three ports.

### **Northern axis:**

- Proposal 5: Re-establish the State's regulatory funding for dredging port access channels.
- Proposal 20: Fix the level of overall level of levies by the State (corporation tax and shareholder dividends), below that observed on average over the last decade to enable the port to make long-term investments.

### **Rhône axis:**

- Recommendation to the Prime Minister: introduce a suitable fiscal framework (public service role, ports of small size...) and accompanying measures (progressive entry into force, reduction of dividends...) to preserve the competitiveness of commercial ports as far as their being subject to corporation tax is concerned.
- VAT: Check that the application of reverse VAT charges operates in conditions similar to those in competitor ports, or even more favourably, while ensuring the risk of fraud is avoided.
- Recommendation to the Secretary of State for Transport: update the indicators for the effectiveness of the MMP Marseille (traffic/employee and turnover/employee).
- Port duties: Recommendation to the MMP: carry out organisational reforms such that the next strategic project could organise stability or, even better, a decrease in port charges over the whole period.

### **Atlantic axis:**

- Axis 2 Pay more attention to the costs of passage through the port; these are often cited by port clients as a major factor influencing the position vis-à-vis other competing ports.
  - o Proposal 4: Build a long-lasting and dispassionate view between the State, the Supervisory Boards and the Directorates of the MMPs, about the issue of dredging.
  - o Proposal 5: Gain agreement from all port actors on common conclusions about French port structures and port costs. Call for the launch of a Benchmarking process on port structures, their costs and their environmental implications by reference to other European ports. An assessment of these items of comparison should be made quickly.





#### **4. Massify traffic and make it reliable: strengthen and extend the port hinterlands**

##### **Evidence:**

**The re-conquest of the hinterland is a major challenge for French ports.** It concerns more particularly container traffic, which carries consumer products just as much as intermediate products and reflects the current system of consumption. Through the establishment of a single large market in the European Union, services related to freight in the ports have in practice been faced with head-on competition from ports in the same maritime range. **The largest international operators, created by globalisation, shipping companies, freight handlers, freight forwarders, shippers of goods, logically play on this competition when organising their logistics network, for which ports become just the entry gate into an open and much larger game.**

Thus the question of massification of traffic and the strengthening of the port hinterlands ought to take into account several issues:

- **The challenge of massification of traffic and its reliability can only be met if the port possesses an excellent service from its hinterland: fluid road access but also and especially river and road services.** According to the expression used by a port actor, there is no limit to the hinterland other than "that for which clients are ready to pay to see their products arrive in the desired timescale". Rail and river transport is essential to enlarge the hinterland of ports because they offer reliable massified transport, not too costly and respectful of the environment. For all that, It does not mean ignoring the substantial role of the road and road freight in the commercial business of ports, but rail and waterways are totally indispensable. The implementation of rail and river services does not need just suitable infrastructure, but a competitive supply of services.
- The ports are facing forces which increasingly overwhelm them: **the economic crisis and low freight rates have brought the world shipping companies to create alliances which structure and protect them but at the same time weaken the ports.** Ports risk a great deal in effect if an alliance decides to prefer one entry into Europe rather than another. For that reason ports must ensure a good level of reliability, an easy ports passage and the massification of the hinterland. These urgent challenges need to be recognised at the highest levels as well as substantial investment strategies.
- **Ports in the North European range are encroaching on the domestic hinterland of French ports.** Unlike the hinterlands of the Hanseatic ports, French hinterlands hardly extend beyond the national territory. The hinterland of Antwerp services a part of North-West France while that of the port of Le Havre has trouble in projecting itself beyond the Paris region. In other words, the domestic hinterland of French ports is too weak: French ports ought to project themselves beyond their domestic hinterlands if they want to remain competitive on the European scale, gain market share, and increase their revenue.

**In addition, the development of massified modes, which could enable French ports to extend their hinterlands beyond national borders, is held back by several administrative, organisational and political problems:**

- **The massified modes are experiencing a certain financial disengagement by the State, as evidenced by the question marks over the future of the grant provided for transshipment between road and waterway ("aide à la pince").**

- **The waterways mode for its part is suffering a damaging differentiation of treatment with respect to the other modes** of onward terrestrial transport during the handling operations of containerised goods. This differentiation stems from the price of the THC (Terminal Handling Charge). While port handling for the rail and road modes is a service wholly included in the THC billed by the shipping company to the shipper of freight, for waterways transport the shipping company passes on the surcharge to the shipper or the waterways operator. Thus the operators of waterway transport must bear the cost of the surcharge for the port handling operations.
- The electronic systems for tracking goods through the port, the Cargo Community Systems (CCS), the most harmonised and common system possible from one port community to the other, are factors for greater efficiency for international operators. Yet **the French port communities – notably those of Le Havre and Marseille-Fos – are currently developing two different and incompatible CCS**. In the context of European competition it is essential to achieve harmonisation of these CCS in order to take their ambitions in this area up to the scale of France.
- **Setting up industrial and logistics sites is a long process** – two years on average, against six months in the Benelux countries – and this despite the size of the port estate available. This state of affairs is explained notably by the lengthy administrative procedures required before the setting up of a logistics site. The report of October 2013 by CGEDD CGIET on this topic formulated some proposals which it would be appropriate to put into effect.<sup>5</sup>
- **Rail freight suffers from problems with the structuring of freight paths and of operations:** a lack of dynamism and of "attention" by SNCF Réseau et Mobilité, the worn out network, difficulties in implementing the projects of local rail operators,...
- The improvement, densification or creation of new freight networks come up against **problems in having them accepted by citizens and the general lack of political promotion of the dossiers**, even when the utility of these networks is unanimously recognised by the actors and experts in the profession. One could cite here the example of the electrification of the rail line between Serqueux et Gisors whose advantages for de-saturation and an alternative route to the traditional network were favoured by the actors interviewed.

These various pieces of evidence define a typology of directions for action developed below:

- Simplify French administrative instruments to facilitate the port passage and re-conquer "local" hinterlands;
- Ease the preliminary procedures required for new logistics sites;
- Carry out the priority freight infrastructure works;
- Strengthen rail and river freight transport.

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<sup>5</sup> S. Catoire, F. Gadbin, J-M. Lacave and G. Patey, *"La mise en œuvre des projets portuaires pour y développer durablement les activités logistiques et industrielles"*. The report offers a series of recommendations to help French MMPs mobilise their estates effectively and carry out programmes of investment projects that favour commercial development and the siting of new activities.

**Proposals:**

**Smooth out the instruments of French administration to facilitate the port passage and reconquer so-called "local" hinterlands**

- 4.1 Implement the intention in the National Logistics Strategy to develop a single CCS at national level.** Monitor the implementation and mobilise the various State administrations concerned.
- 4.2 Maintain the transshipment grant for road-river combined transport ("aides à la pince") and make the payment of the grant to operators of combined transport promptly.**
- 4.3 Encourage the willingness of port communities, and notably of shippers and shipping fleets to look favourably on the use of waterways by introducing clear processes that would stimulate the massification of pre/post transport, for example in sharing the surcharge for waterways handling in their pricing structures.**

## **In the parliamentary reports:**

### **Seine axis:**

#### **CCS:**

- Recommendation 8: Set up a committee of CCS users and a single database at national level open to all the professions, responding to their needs on data handling, and connected to the Customs data systems.
- Recommendation 9: The State should contribute its support to the developments needed to bring up to standard the software indispensable to the CCS and PCS (Port Community System for ship movements). The resources of the Plans for Investment in the Future (PIA) and the Public Investment Bank (BPI) should be mobilised through shareholdings at a suitable level. By these means, ensure the presence of the State and the MMPs at a 50% level in the body in charge of commercialising the CCS/PCS.
- Recommendation 10: Improve significantly the fluidity of operations by introducing a CCS or even a single CCS-PCS for, as a minimum, the seaports of the Seine axis and, if possible, integrating the container terminals of the Autonomous Port of Paris and also available to all the domestic platforms outside the Paris region accessible to the seaports on the Seine axis. Offer, as at Antwerp for example, cost-free access for the export operations of all shippers, including those who operate from Belgium, the Netherlands and Germany.

#### **Aide à la Pince:**

- Recommendation 15: Maintain the grant for transshipment of combined transport at waterway terminals ("aide à la pince") in conditions equivalent to those of neighbouring countries. In any case, evaluate the impact the cessation of this grant would have on multimodal traffic.

#### **THC:**

- Recommendation 16: identify the best way of bringing about the sharing of THC at Le Havre after having examined the feasibility of the various approaches (voluntary process / national legal framework)

### **Northern axis:**

#### **CCS:**

- Proposal 17: Create a body responsible for commercialising a single CCS-PCS at the level of the Hauts-de-France region bringing together the MMP of Dunkerque at 50% and the professionals of the region at 50%.
- Proposal 18: Do everything possible to bring about a single national CCS and in the absence of significant advance in this process before the end of 2016, to impose through law the hosting of CCS data by a single State operator.

#### **Aide à la pince:**

- Proposal 12: Consider a harmonisation (even an alignment) of grants to combined transport with those current in Belgium.

#### **THC:**

- Proposal 16: Support the planned platforms on the Seine-Nord-Europe canal with specific provisions facilitating modal transfer towards the massified modes.

### **Rhône axis:**

#### **CCS:**

- Recommendation to the President of the future Council for Mediterranean inter-port coordination: set up a single CCS for the France Med Range, accessible to all domestic platforms and cost-free for exporting operations to all European shippers.

#### **Aide à la pince:**

- Recommendation to the Prime Minister: keep the "aide à la pince" transshipment grant to encourage waterway transport while awaiting the new provisions for handling river freight that will follow on from the entry into service of the "rotule" area at Fos.

#### **THC:**

- Recommendation to the MMP Marseille: negotiate the clause of the lease relating to the filling in of the "rotule" in favour of a guarantee of service to riverside berths, and an end to surcharging barges through recycling the productivity gains to shipping companies, dock handlers and waterway operators.

## Facilitate the development of logistics sites

**4.4 Facilitate the construction of logistics warehouses in order to retain industrial and logistics activities in ports and their close hinterland.** The logistics systems of shippers are driven by the transformation of their products. If these transformation sites are near a port, a shipper will continue to use this port. This supposition assumes that the ports and local authorities concerned manage to plan the industrial and logistics zones in a way that responds to the needs expressed by the logistics operators. It is a matter of spatial planning and also a matter of being able to prepare in advance the administrative authorisations of all kinds that are needed and notably the environmental documentation (Water Act authorisations, ICPE Integrated Pollution Prevention Control permits, environmental assessments,...) in order to shorten the timescale when responding to potential clients.

**4.5 Take inspiration from the experience of the "logistics conveyer belt" of the port of Le Havre,** which consists of acquiring land in order to start the process of administrative authorisation before an applicant arrives. It is necessary to have "ready to use land" close to the port.

**4.6 Encourage the setting up of a one-stop shop at the prefecture** that could accompany and facilitate the administrative authorisation of major logistics development projects.

### In the parliamentary reports:

#### Seine axis:

- Recommendation 17: The question of the location of new industrial and logistics sites on the public ports estate should be subject to a special examination in the context of updating the general property code of public entities.
- Recommendation 18: Carry out the administrative investigation in a way to be able to guarantee to investors the timescales and conditions, and thus their location costs.
- Recommendation 18b: Set up a really one-stop shop in the Prefecture able to help the larger projects obtain their administrative authorisations (building permits, authorisations relating to the Water Act, ICPE,...).

#### Northern axis:

- Proposal 7: introduce a real strategy of advance property development on the territory concerned by the Canal Seine Nord Europe project with:
  - o An extension of the boundary of the land retained, so as to preserve the prospect of future locations for industrial and logistics activities that are big users of waterways;
  - o The mobilisation of the relevant land management agencies (EPF and SAFER) that aid territorial development projects.

- Proposal 25: Introduce an entity for the common governance of risk that includes the MMP of Dunkerque.

#### Rhône axis:

- Recommendation to the Prime Minister: following an analysis, ask the prefects of the perimeter of Medlink to implement the proposals from the "regulatory competitiveness" approach initiated in the PACA region.
- Recommendation to the DREAL of PACA and MMP Marseille: use the "regulatory competitiveness" approach to guarantee to investors the timescale, cost and conditions of their location project: introduce without delay the changes using current law and identify legislative and regulatory modifications.
- Recommendation to the prefect of PACA: promote the proposals from the "regulatory competitiveness" approach to the directorates of the central administration and ministers.
- Recommendation to the association Medlink: extend its competences to the location of transformation activities and to all transport modes (rail and multi-modal terminals for waterways, roads and pipelines).
- Recommendation to the MMP Marseille: be assertive as facilitator of the regulatory procedures, and of the good functioning of the supervisory services including when they are exercised by the State.

## Carry out the priority freight infrastructure projects

- 4.7 Restore service quality in the hinterlands through an increased infrastructure budget:** the public authorities, State and Regions, responsible for the dialogue with the infrastructure managers (SNCF Réseau and VNF), must reinforce and improve infrastructure. They must "send a signal to the shipping alliances with a shock supply of infrastructure"<sup>6</sup> and **favour the regeneration and maintenance of rail and river transport infrastructure.**
- 4.8 Carry out the freight projects suggested in the report *Mobilité 21*: the Serqueux-Gisors rail link and the Fos-Salon motorway.**

## Support rail and waterway freight transport

- 4.9 Improve the hinterlands and freight corridors in a European strategy.** To survive, French ports must project their hinterlands beyond their domestic hinterlands, and beyond national borders. To do that, **it would be appropriate to encourage the development of river services, while remaining nevertheless conscious of the geographical limits of the waterway, as well as confronting the challenge of rail freight** to enable the boundaries of domestic hinterlands to be overcome.
- 4.10 Increase the connectivity of the hinterlands by discussing the restructuring of train paths with SNCF Réseau in order to make freight paths more reliable. The local port rail operators could be helpful on this topic.**

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<sup>6</sup> Phrase borrowed from Stephan Snijders, former Director general of MSC France.

## **In the parliamentary reports:**

### **Seine axis:**

- Recommendation 23: Put in place rules for renovation and a suitable operating regime for feeder networks.
- Recommendation 24: Make the reservation of freight rail paths on the different routes from the ports of the Seine axis more reliable. Coordinate the operations of SNCF's marshalling networks, the port rail networks and the industrial-port site terminals.

### **Northern axis:**

- Proposal 10: Prioritise and accelerate the investment projects to be carried out to improve the competitiveness of infrastructure.
- Proposal 16: Support the planned platforms on the Seine-Nord-Europe canal with specific provisions facilitating the modal transfer towards the massified modes.

### **Rhône axis:**

- Recommendation to the Prime Minister: Establish an indicator to measure the effectiveness of port activity for the economic development of its hinterland and test it at full scale.
- Recommendation to the prefect of PACA: Carry out a joint discussion on the massification of railway services (continental and maritime flows) with the logistics organisations and the port of Marseille-Fos.
- Recommendation to the MMP Marseilles: integrate the lines of SNCF Réseau situated within the port domain and draw up an ambitious operating strategy for the new port rail network.

- Recommendation to SNCF Réseau: carry out the electronic modernisation of the system for managing train paths.
- Recommendation to the MMP Marseille and SNCF Réseau: ask the "workshops for railway cooperation" to meet to share diagnoses and development objectives, and increase the capacity of rail corridors while generating efficient freight paths in good timescales.

### **Atlantic axis:**

- Axe 1: Steer a development strategy for the seaboard ports in a new way by seeking commitments on support by the State and regions, aided by Europe.
  - o Proposal 2: Draw up and implement a programme of the investments needed to connect the three ports of La Rochelle, Bordeaux and Nantes closely to their hinterland. The Western and Centre regions should take the initiative, with the State, of piloting a specific strategy and plan of action focused on this issue of developing rail, road and river transport networks, and the logistics zones behind the three ports and closely linked to them. This plan should be designed with the transport network operators and the public officials dealing with logistics, who should find the resources needed to support a coherent development of the seaboard ports, oriented towards the improvement of services rendered to the economy of the regions concerned.





## 5. Strengthen the image of French ports

### Evidence:

Apart from recent events which upset the smooth running of French ports in the context of demands that go well beyond port issues, **French ports have returned to more peaceful working relationships since the 2008 reform was implemented, in the opinion of all the actors interviewed.** At that time there were more strikes in the ports of Antwerp or Rotterdam than in Le Havre or Marseille. The ports reform of 2008 has thus been beneficial for the social climate of French ports, even if the image of adversarial French ports is still present in many international minds.

More broadly, the TDIE working group noted the low ranking of port, freight and logistics matters in the concerns of local and national politicians, as well as in those of the general public:

- **Freight infrastructure lacks national political support.** The utility of freight infrastructure needs to be justified and promoted politically in order to win the adhesion of local residents as well as of the local authorities called upon to contribute to their construction.
- **Needs in the rail freight area are not generally given priority in comparison with the strong pressure on the rail network to transport passengers.**
- **The reputation of French ports and the attraction of clients and new traffic lack a "French ports team",** as emphasised by Valérie Fourneyron (MP for Seine-Maritime) and Charles Revet (Senator for Seine-Maritime),<sup>7</sup> that could promote the port interests of France beyond national borders. This idea of a community of actors "hunting in a pack", occurred several times in the discourse of the actors interviewed,<sup>8</sup> evidence of a collective desire for a collective project. This wish was often combined with an appeal for the strategic State to take responsibility.

### Proposals:

#### Raise the political profile of freight transport in France (maritime, waterways, rail, road)

**5.1 Improve awareness of the value of transporting goods** – notably for rail – whose economic and societal importance tends to be minimised, among the public as much as among politicians, in comparison with transporting passengers.

**5.2 Encourage the creation of commercial, marketing and communication divisions within the port groupings of each seaboard.** One of their roles could be to dialogue with local and national politicians, as well as the public, on the importance of ports in the French economy and for French territorial development (jobs, tourism,...).

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<sup>7</sup> Parliamentary Report, "Attractivité des ports maritimes de l'axe Seine", July 2016.

<sup>8</sup> As well as during a breakfast-debate organised by TDIE at the Senate, 1 March 2016, on the theme: "Les ports français, acteurs majeurs de la stratégie nationale de la logistique".

## Strengthen the image of French ports abroad

- 5.3 Increase publicity among international freight shippers and shipping companies about the advantages of French ports compared to their European competitors.** This role could be taken on, for example, by the commercial, marketing and communication divisions within the port groupings.
- 5.4 Create communication synergies so that the French port community appears united on the international scene.** The Union des Ports de France could federate and represent the French Major Maritime Ports, at international Shows in Europe for instance.
- 5.5 Mobilise the commercial and communications intermediaries of French ports abroad** via the French Economic Missions in embassies overseas and the Business France network.
- 5.6 Exert greater pressure in European negotiations, to promote the French national structuring axes on the European scene.** Setting up a real European lobbying effort by French ports led by the Union des Ports de France seems today to be necessary.

### In the parliamentary reports:

#### Seine axis:

- Recommendation 19: Create a flexible coordinating structure between the Regions, the development agencies, the logistics sector and HAROPA to be in a more advantageous position to capture foreign investment in the port zones and nearby. Sign a partnership with the national operators, and in prime place Business France, and with the diplomatic network.

#### Rhône axis:

- Recommendations to the port community and trade unions: continue with the joint promotion of the port of Marseille-Fos to territorial authorities and foreign clients.
- Recommendation to the prefects of Auvergne-Rhône-Alpes and PACA regions: facilitate the rapprochement of the Lyon and Aix-Marseille-Provence Metropolitan Authorities so that an action plan to make Marseille-Fos Lyon's port could be promoted jointly, in Brussels in particular.
- Recommendation to the MMP: invite the Union Maritime et Fluvial and Via Marseille Fos to locate their offices in the port's headquarters.

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Definition of the study's objectives

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- Facts and figures: Current position of French ports
- The Major Maritime Ports
  - Ports in the Seine valley
  - Ports on the Atlantic seaboard
  - The Major Maritime Port of Marseille (GPMM)
  - The Major Maritime Port of Dunkerque (GPMD)
- Current debates relating to ports in 2015 and/or 2016
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- The European Union
  - Trans-European Transport Network (TEN-T) and the Connecting Europe Facility (CEF)
  - Proposal for a Regulation of the European Parliament and of the Council establishing a framework on market access to port services and financial transparency of ports
- Local rail operators (OFP)
- Short Sea Shipping

### The port issue in parliamentary debate

- 2007-2016: Chronology of the main national current events related to ports
- National Strategy for Re-launching Ports of 2013
- Thematic Conferences:
  - The Environmental Conference
  - The National Conference on Waterway Freight
  - The Conference for Re-launching Rail Freight
- Parliamentary reports on the attractiveness of French seaports
  - Comparative summary of the reports
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Glossary of terms

Genealogy of TDIE's work on ports

## List of individual experts met by TDIE

### List of individual experts interviewed by the TDIE working group (in date order of hearings)

- Hervé MARTEL, President of the Union des Ports de France (working meeting Wednesday 7 October 2015)
- Thierry GUIMBAUD, Director of transport services, DGITM (Monday 25 January 2016)
- François PHILIZOT Prefect, inter-ministerial director for the development of the Seine Valley (Friday 29 January 2016)
- Objectif OFP (Wednesday 3 February 2016):
  - Jacques CHAUVINEAU, President, Objectif OFP
  - André THINIÈRES, Director general, Objectif OFP
  - Philippe GUILLARD, President, OFP Atlantique; Director of Operations and Logistics, MMP La Rochelle
- Denis CHOUMERT, President, Association of freight transport users (AUTF) (Friday 12 February 2016)
- TLF Overseas (Wednesday 17 February 2016):
  - Herbert DE SAINT-SIMON, President, TLF Overseas
  - Anne SANDRETTO, Director general, TLF Overseas
  - Alain COHEN, Maritime Director, Kuehne + Nagel
  - Jean-François AUZÉAU, President of the Customs Commission, TLF Overseas
  - Loïc GAY, Project leader on CCS, TLF Overseas
- Hervé CORNÈDE, Commercial and marketing director, HAROPA (Thursday 25 February 2016)
- Albert THISSEN, President, Hapag Lloyd France (Thursday 25 February 2016)
- Paul TOURRET, Director, ISEMAR (Tuesday 1 March 2016)
- Eric BANEL, Director general, Armateurs de France (Tuesday 1 March 2016)
- Jean-Michel SÉVIN, former Director general, Ports Normands Associés (PNA) (Tuesday 8 March 2016)
- SNCF Logistics (Thursday 17 March 2016):
  - Jean-Michel GENESTIER, Deputy director general and General Secretary, SNCF Logistics
  - Anne-Gaëlle SIMON, Director of public affairs, SNCF Logistics
- Jean-Marc LACAVE, former Director general, Autonomous Port of Le Havre (2000-08); former Director general, CMA-CGM (2008-10) (Thursday 17 March 2016)
- Christine CABAU-WOEHREL, President of the Directorate, MMP of Marseille (Wednesday 23 March 2016)
- Alexis ROUQUE, former Director general, Ports de Paris (Thursday 21 April 2016)
- Directorate of Infrastructure, Transport and the Sea (DGITM) (Monday 2 May 2016) :
  - Nicolas TRIFT, Deputy to the under-director of ports and waterway transport
  - Clara BENTZ, Head of the Bureau on ports strategy and development
  - Pierre DES ROSEAUX, Head of the Bureau on ports
- SNCF Réseau (Tuesday 3 May 2016):
  - Romain DUBOIS, Deputy director general of Access to the network
  - Jean-Pierre ORUS, Head of Services provision development
- Jean-Marie MILLOUR, Director general, BP2S (Tuesday 3 May 2016)
- Jean-Philippe SALDUCCI, President, Union maritime et fluviale de Marseille-Fos (UMF) (Monday 9 May 2016)

- VNF (Wednesday 25 May 2016):
  - Marc PAPINUTTI, Director general
  - Renaud SPAZZI, Deputy director general
- Antoine BERBAIN, Deputy director general, HAROPA (Friday 17 June 2016)
- Arnaud LEROY, Member of Parliament for French citizens abroad, rapporteur of the Act on the Blue Economy (Wednesday 29 June 2016)
- Philippe DEISS, Director general, Ports Normands Associés (PNA) (Friday 1 July 2016)
- DGITM (Monday 11 July 2016):
  - Clara BENTZ, Head of the Bureau on ports strategy and development
  - Renan KREMER, responsible for statistics on seaports
- Noël COMTE, President, Medlink (Tuesday 12 July)
- Union nationale des industries de la manutention (UNIM) (Monday 18 July):
  - Christian DE TINGUY, President
  - Xavier GALBRUN, Director general
- Regional Council of Normandie (Tuesday 19 July 2016):
  - Hervé MORIN, President
  - Frédéric OLIVIER, Director general of Services
- François SOULET DE BRUGIÈRE, President of the Supervisory Board, MMP of Dunkerque; President-Director, Union des ports de France (UPF) (Wednesday 20 July 2016)
- Agence des participations de l'Etat APE) (State shareholdings) (Wednesday 14 September):
  - Bruno VINCENT, Deputy director of shareholdings, Transport sector
  - Paul TIRVAUDEY, Shareholdings officer, Transport sector
- Jean-Yves LHOMME, Regional councillor, Hauts-de-France Regional Council (Friday 16 September 2016)
- Sébastien PILARD, Regional councillor in charge of blue growth and international relations, Pays-de-la-Loire Regional Council (Friday 30 September 2016)

#### **List of experts met during the study voyage to Le Havre on 9 and 10 March 2016**

##### *Round table with the actors in the port community of Le Havre:*

- Michel SEGAIN, President, Union Maritime et Portuaire (UMEP)
- Jean-Louis LE YONDRE, President of the Development Council of the MMP of Le Havre; President, Syndicate of Le Havre freight forwarders
- Benoît DOUILLET, Vice-president, Le Havre group of shipping companies and maritime agents
- François GUERIN, Vice-president of UMEP; representative, Group of employers of manual labour (GEMO)
- Franck DHERSIN, President of the transport, major transport infrastructure, ports economy, maritime affairs Commission, Hauts-de-France Regional Council
- François SOULET DE BRUGIERE, President of the Supervisory Board, MMP of Dunkerque
- Catherine TROALLIC, Member of Parliament for Seine-Maritime
- Jacques TRORIAL, Honorary President, Union des Ports de France (UPF); former Minister
- Fabienne CORRUBLE, Director for Manche – Mer du Nord, Engie

*Dinner-debate:* Edouard PHILIPPE, Member of Parliament and Mayor of Le Havre (Wednesday 9 March 2016), in presence of Jean-Baptiste GASTINNE, Vice-president of the Normandie Region, in charge of Transport

*Breakfast-debate:* Patrick MALETRAS, President, Tramar (Thursday 10 March 2016)



**List of experts met during the study voyage to Marseille on 11 and 12 May 2016**

- CMA-CGM (Wednesday 11 May 2016):
  - Luc PORTIER, Director of studies, projects and development,
  - François Peigné, Director of operations
- Stephan SNIJDERS, Former director general, MSC France (Wednesday 11 May 2016)
- Marc REVERCHON, President of the Development Council, MMP Marseille, President director general, Compagnie Méridionale de Navigation (Wednesday 11 May 2016)
- PortSynergy (Wednesday 11 May 2016):
  - Nicolas GAUTHIER, Director general, PortSynergy
  - Mathieu DESIDERIO, Responsible for investments, Eurofos
- Grand Port Maritime de Marseille (MMP Marseille) (Wednesday 11 May 2016):
  - Monica MICHEL-BONVALET, Director of the commercial department
  - Fabienne MARGAIL, Head of the hinterlands department
- Alain MALIVERNEY, Regional Director, LOGIRHONE (Thursday 12 May 2016)
- Regional Council of Provence-Alpes-Côte d'Azur (PACA) (Thursday 12 May 2016):
  - Maxime TOMMASINI, President of the Transport, Infrastructure, Territorial Planning and Ports Commission, Transport adviser at the Marseille Metropolitan Authority
  - Julien GEFFARD, Transport adviser to the President

## **Interview guide given to the individual experts**

*In preparation for each hearing, an interview guide was sent to the individual experts invited. This generally comprised:*

- *A cv of the individual interviewed and of his or her organisation,*
- *Some particular questions which were modified for each interview,*
- *Some general questions, separated by theme.*

*The general questions are given below.*

### **Items of evidence and issues relating to French ports**

What, according to you, are the main strengths of the various French port communities, and what factors are holding back their development?

More generally, what view do you have about the functioning of French ports? How can the dynamism and productivity of French port communities be increased? In other terms, what are the principal problems of French ports which remain to be dealt with to make them competitive in Europe?

### **Economic dynamism, port governance and current issues**

What are your expectations in terms of ports strategy on the part of the State?

What is your vision of the place and role of the Region in the design and implementation of a ports policy?

Should the Metropolitan cities or conurbations be more closely associated with the governance of ports? If so, why and how?

Numerous actors in the port communities have stated their agreement that the French ports reform of 2008 was a good thing and is starting to show encouraging results. Do you share this viewpoint? Should the governance of ports change further, and if so, how?

Are the weak maritime dynamics in France explained by a regulatory problem or by the economy (weak port traffic in France, complexity of customs procedures, cost of customs clearance, VAT,...)?

At which levels of the logistics chain should action take place as a priority to free up margins for progress, and provide levers for competitiveness and improvement in the efficiency of these chains? What method should be applied and who should apply it (shipping companies, freight handlers, forwarders, surface transport operators, Customs,...)? Is it the role of private actors or public authorities to find these levers for competitiveness?

What port and logistics projects do port communities need today?

### **Hinterland access: river and rail freight**

On 1 February 2016 the Prime Minister launched a series of four parliamentary commissions on improving the attractiveness and competitiveness of the main French maritime ports. The first concerned Le Havre, the second Dunkerque, the third Marseille-Fos and the fourth the Atlantic seaboard. What are you expecting from this initiative?

What would you consider to be a good service of the hinterland for a port? What are the different levers that could enable this service to be improved?

Is it still useful and/or pertinent to want to encourage modal transfer, and why? What are the handicaps and the solutions envisaged for facilitating the transfer of containers onto a barge (THC, costs of handling,...) ?

### **TDIE's initiative**

What are you expecting from TDIE's initiative?

## Definition of the study's objectives

The association TDIE, in liaison with the Union des Ports de France, launched a project in the second half of 2015 on the issues concerning France's ports strategy over the next few years. This work aimed to identify the levers for improving French ports and port communities, in terms of their attractiveness, productivity and competitiveness.

Today it does not mean thinking of further reform but of identifying the decisions and directions needed to allow French ports to exploit the various tools they were given in the 2008 Act, in the best way, in the European context, and to spread understanding about them.

*Four events marked TDIE's consideration of the issues:*

- A breakfast-debate at the Senate on 1 March 2016, on the theme: "French ports, actors in the national logistics strategy"
- A visit to Le Havre on 9 and 10 March 2016 to see the port and meet the actors of its port community
- A visit to Marseille on 10 and 11 May 2016
- A conference on 11 October 2016

*In carrying out this work, TDIE was supported by a working group composed of:*

- Claude Gressier, Adviser to the Director of DGITM and member of TDIE's Research Council
- Antoine Fremont, Director of research at IFSTTAR and member of TDIE's Research Council
- Bernard Mazuel, Director General of the Union des Ports de France
- Christina Peron, Responsible for communications at the Union des Ports de France
- Pierre Van Cornewal, Director General of TDIE

Rapporteurs :

- Sonja Broëz, Project leader at TDIE
- Pierre-Yves Rollin, Responsible for studies at TDIE

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