

The European Union's Tacis TRACECA programme
for Armenia, Azerbaijan, Bulgaria, Georgia, Kazakhstan, Kyrgyz Republic, Moldova,
Romania, Tajikistan, Turkey, Turkmenistan, Ukraine, Uzbekistan

TACIS 117107

Improvement of Maritime Links between TRACECA and TENs Corridors

Bulgaria Georgia Romania Turkey Ukraine

Progress Report 1

November 2007



This project is funded
by the European Union

A project executed by
Royal Haskoning,
NEA
BCEOM



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1 Report cover page

Project Title:	Improvement of Maritime Links between TRACECA and TENs Corridors	
Project Number:	TACIS 117107	
Country:	Ukraine, Romania, Bulgaria, Turkey, Georgia	
Document Name	Maritime Links TRACECA-TEN Progress Report 1	
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TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



Table of Contents

1	REPORT COVER PAGE.....	1
2	PROJECT SYNOPSIS	3
3	EXECUTIVE SUMMARY	4
4	INTRODUCTION	6
5	PROJECT EXECUTION.....	7
5.1	PROJECT PROGRESS	7
5.2	PROJECT OBJECTIVES AND DELIVERABLES	29
5.3	PROJECT EXECUTION IN THE REPORTING PERIOD	34
5.4	CONSTRAINS, RISKS AND ASSUMPTIONS.....	34
5.5	UPDATE OF LOGFRAME	37
6	PROJECT PLANNING	40
6.1	OVERALL PLANNING	40
6.2	WORK PLAN FOR THE NEXT REPORTING PERIOD.....	42
6.3	REQUESTS FOR BUDGET DEVIATIONS AND PROJECT EXTENSION.....	43

ANNEXES

Annex A	List of Visits and Meetings in the Reporting Period
Annex B	Questionnaire ICT / PCS
Annex C	Questionnaire Tariff Study
Annex D	Report Distribution List



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2 Project synopsis

Project Title:	Improvement of Maritime Links between TRACECA and TENS Corridors
Project Number:	TACIS 117107
Countries:	Bulgaria, Georgia, Romania, Turkey & Ukraine

Project activities:

Phase 0 (April – June 2007):
Inception

Phase 1A (June 2007 – April 2008):
Preparation of the Market Study

Phase 1B (June 2007 – April 2008):
Preparation of the Action Plan
Development of Port PPP Framework

Phase 2 (May 2008 – April 2009):
Preparation of the Feasibility Study for Samsun Port Ferry Links
Implementation of maritime safety and security improvements
Development of a Port Community Pilot Scheme
Assessment of the PPP potential of port investment needs/projects in the region and selection of Bankable Projects.

Project starting date: 16 April 2007

Project duration: 24 months

Project implemented by: Royal Haskoning (The Netherlands) and consortium partners:
NEA Transport Research and Training (The Netherlands)
BCEOM (France)



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3 Executive Summary

The purpose of the project is to create the basis for the improvement of maritime links in the Black Sea region. This relates to reliable, safe, secure, competitive and efficient shipping and port services and to enable viable links with the Trans European Networks mainly with regard to rail ferry, Ro-Ro ferry and container services.

The project focuses on the Black Sea countries of the Ukraine, Romania, Bulgaria, Turkey and Georgia.

The ports to be covered by the project are pointed out in the following figure.



This first Progress Report covers the period from 16 April till 15 October 2007.

During this reporting period the project was started up with a kick-off meeting (16 April 2007) in Brussels with the EU Task Manager and the project management, the Inception Phase was concluded and the project team with respect to international and local non-key experts was formed.

The Inception Phase (16 April – 30 June) was done by the principal key experts, Mr. Verwaerde (PCS), Mr. Westerkamp (Market Research) and Mr. Lock (Team Leader). Mr. Merrien (Port Infrastructure) could not take part in the missions to the Black Sea region due to health reasons.

During the Inception Phase the principal recipient organisations were visited, the project was explained and the key experts introduced to those organisations. Additionally, the local organisation of the project was set up with the local partners.

The Inception Report was submitted to the EC at the beginning on July 2007.

As it was found important to achieve the overall long term objectives of the project, the project was extended with a 5th project result: Public Private Partnership (PPP) and Bankable Projects. This project result is aimed to identify realistic maritime transport investment project, define per project country the legal framework for PPP financing and to advise how to structure PPP finance for specific port development projects.



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This addendum to the project was accepted by the EU and in August, the PPP expert started his work.

As the main focus in the first project year is the Market Research and Action Plan, the initial activities were aimed to obtain as much statistical information and to have interviews with the stakeholders and the Black Sea maritime transport sector. This was done by the Transport Economist and the Port Operations and Maritime Transport expert.

It has to be noted that the collection of relevant statistical data is progressing slowly and not all data is available in the required format (and language).

Furthermore, the PCS expert visited the ports in the Ukraine, Romania Bulgaria and Georgia to identify the present status in those ports with respect to Port Community Systems. The Turkish ports are to be covered in the month of November 2007.

It has to be noted that within the budget and Terms of Reference of this project, the PCS expert is not to design, develop and implement a Port Community System in the project ports. The principal task is to identify how far the ports in question are with a PCS, make a proposal on what direction the PCS for Black Sea ports should develop to, work this out for a pilot port in the Black Sea region and, on the basis of the pilot project, disseminate the results and prepare a proposal for a common PCS Plan of Approach for all project ports.

The Safety and Security expert started his tasks in September and covered so far Bulgaria and Romania. During his mission, the Safety and Security expert had several one-to-one and one-to-two meetings during which he could explain more in depth the structure and approach of safety and security management systems.

His main concern is the evaluation of Port Security and Port Facility Security Plans as he needs to be commissioned by the Ministry of Internal Affairs in the countries concerned.

All the rail ferry terminals in the Black Sea, except Derince, have been visited in the reporting period and it was noted that not too much handling operations were taking place at those terminals. The rail ferry terminal of Samsun has only been operational between 1986 and 1989.

In September the Regional Project Office was established in Sofia and all relevant organisations informed about the new contact details for the project.

The Consortium has started to write the Working Papers for the five project results. Those dynamic papers are to be updated regularly and are to be finalized in line with the project planning.



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4 Introduction

This first Progress Report covers the period from 16 April till 15 October 2007.

During this period the project was started up, the Inception Phase was concluded and the project team with respect to international and local non-key experts was formed.

The Inception Phase (16 April – 30 June) was done by the principal key experts, Mr. Verwaerde (PCS), Mr. Westerkamp (Market Research) and Mr. Lock (Team Leader). Mr. Merrien (Port Infrastructure) could not take part in the missions to the Black Sea region due to health reasons.

During the Inception Phase the principal recipient organisations were visited, the project was explained and the key experts introduced to those organisations. Additionally, the local organisation of the project was set up with the local partners.

This first Progress Report gives an overview of the activities carried out during the reporting period, progress made, deviations and bottlenecks encountered and the work plan for the next reporting period.

The project team consists presently of the following experts:

Name Expert	Position	Approved person-days
Key expert		
Edwin Lock	Team Leader	420
Klaas Westerkamp	Transport Economist	175
Peter Verwaerde	PCS Expert	210
Andre Merrien	Port Infrastructure Expert	105
Johan Gauderis	PPP Expert	105
International non-key experts		
Bertrand Apperry	Safety & Security Expert	60 (1 st phase)
Wouter van Nus	Tariffs Expert	20
Sean Newton	Traffic Forecast Expert	30
Barry Zondag	Modelling Expert	20
Loretta Rudzikaite	Market Research & Database	25
Amanda Rasch	Data Collection & Reporting	25
Local non-key experts		
Kristiana Chakarova	Local Expert Bulgaria	40
Ekaterina Bassova	Local Expert Ukraine	40
Ioan Cuncev	Local Expert Romania	40
Georgi Gogiashvili	Local Expert Georgia	40
Ozan Kuyumcuoglu	Local Expert Turkey	20



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5 Project Execution

5.1 Project Progress

5.1.1 Project Missions

The following missions to the Black Sea region have been executed in the period 16 April – 31 October 2007.

Mission description	Period	Project Result	Countries, cities or ports	Team members
Inception 1	7 – 16 May	All	Ukraine, Bulgaria & Romania	EL, KW, PW
Conference	5 – 8 June	PM	Odessa	EL
Inception 2	11 – 15 June	All	Turkey & Georgia	EL, KW, PW
IGC TRACECA	18 June	PM	Baku	EL
Rail seminar	2 – 5 July	1	Odessa	KW
Fact finding	10 July	1	Baku	KW
Regional office	30 July – 10 Aug	PM	Sofia	EL
Fact finding	6 – 17 Aug	1, 4	Varna, Burgas, Constantza, Sofia	PW, WW
Fact finding	3 – 14 Sep	1, 4	Poti, Batumi & Sofia	KW, PW, WW
Regional office	10 – 21 Sep	PM	Sofia	EL
Fact finding	17 – 28 Sep	3	Sofia, Burgas, Varna, Constantza, Bucharest	BA
Fact finding	1 – 12 Oct	1, 4	Odessa, Illiychevsk, Sofia	KW, PW, WW
Fact finding	1 – 12 Oct	5	Sofia	JG, WN
Regional office	1 – 12 Oct	PM	Sofia	EL
Fact finding	22 – 25 Oct	1	Samsun, Ankara	KW, WW
Fact finding	29 – 31 Oct	1, 3	Haydarpasa, Derince	KW, WW, BA

Project results:

- 1 Market Research
- 2 Rail Ferry Connections Samsun
- 3 Safety & security management systems
- 4 Port community systems
- 5 PPP and investment projects
- PM Project management

Team members:

- EL Edwin Lock (Team leader)
- KW Klaas Westerkamp (Market research)
- PW Peter Verwaerde (PCS)
- JG Johan Gauderis (PPP)
- BA Bertrand Apperry (Safety & security)
- WW Wim Welvaarts (Port operations)
- WN Wouter van Nus (Transport tariffs)

For details about the missions, reference is made to Annex A: List of Visits and Meetings in the Reporting Period.



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5.1.2 Market Research and Action Plan

5.1.2.1 *Project Progress*

Introduction

Main objective of the market research on maritime transport in the Black Sea area is to support the ports, shipping lines and other actors involved in maritime links in the Black Sea in their development as important elements in current and future logistics chains along the TRACECA corridors. The main element for this support is a forecast of transport flows in the Black Sea area for the year 2020. By presenting a forecast for transport flows for the year 2020 ports, shipping lines and related organisations will be able to focus their development plans in line with market demands. In this respect especially the forecasted number of containers is essential, given the increasing containerisation, the developments in the trade Europe – Asia and the current lack of capacity of container terminals in the Black Sea ports. On the basis of the results of the market analysis an action plan will be determined including recommendations for a more balanced and transparent tariff setting, recommendations on additional logistics services to be established, identified priority investments and stages for further technical assistance.

Overview of activities

During the first phase of the project after the inception missions the activities have been focused on collecting information from port authorities and port related organisations like transport associations, shipping agents and freight forwarders. Also the TRACECA office in Baku was visited to discuss the project with the data base expert. In Odessa a meeting was held with the Association of Black Sea Ship Owners (BINSO).

With port authorities interviews have been conducted focused on the current capacities of the ports, future investment plans and resulting capacities especially in the field of container throughput. Other subjects discussed include their opinions about hinterland connections and tariff setting.

The objective of the interviews was to assess a first global SWOT analysis of the different ports and their future perspective as logistics centres in the Black Sea area. Furthermore, stakeholders were asked for detailed statistical information regarding origin and destination of current transport flows handled by the ports and current port performance.

The results of the SWOT analysis will be used in the transport forecast, combining forecasted trade and transport data based on trade and transport models with essential stakeholder information on port developments in terms of capacities and hinterland connections.

Interviews with port authorities and other port related stakeholders have been conducted with organisations in the ports of Batumi and Poti, and Odessa and Illychevsk. Later in October the Turkish ports and related Turkish organisations will be visited.

The Port Operations and Maritime Transport Expert has visited the seven ports as identified in the ToR of the following countries; Bulgaria, Romania, Georgia and Ukraine during the past period.

Meetings were organised with a.o. representatives of the Port Authorities and Terminal Operators to obtain an understanding of the current port operations and future development plans.

Each of the ports was requested to complete a standard template as prepared by the Consultant or forward the required information in their own format. The requested information comprises the following items:

- Commodity (referring NSTR 25 standard)
- Berth number(s) at which the commodity is handled



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- Number of vessels handled at berth for the commodity per year
- Time of vessels at berth [hrs/year]
- Throughput of the commodity at berth per year
- Total number of quay handling equipment at berth incl. their specifications (i.e. capacity)
- Containerised or not containerised
- Containers handled at berth [TEU/year]
- RoRo or not RoRo
- RoRo Trucks handled at berth per year

It was requested that the above information would be supplied for each commodity (referring NSTR 25 standard) and separately for the following years: 2004, 2005 and 2006.

So far the Consultants have received statistical information from the Port of Burgas, the Port of Constantza and the Port of Illiychevsk. The information as forwarded by the Port of Constantza is deficient in some items and we are awaiting additional data. Information from the following ports is still awaited; Varna, Poti, Batumi and Odessa.

The received data will be analysed and compared with international benchmarks in a later stage of the project and is to be included in the working paper 'Market Research'.

Overall results

Before presenting the first results of the discussion with stakeholders in the Ukrainian and Georgian ports regarding the current situation, prospects for the future and investment plans; first a global assessment is presented.

Capacities / development plans

The situation in the Georgian ports Batumi and Poti is at the moment uncertain because of complete privatisation of these ports. Batumi has already been sold to a private operator who now intends to act as a landlord by concessioning terminals/berths, while Poti is moving away from the landlord model via a privatisation like in Batumi that will take place in the very near future. Shipping agents and freight forwarders have expressed their concern and indicate that they do not have any idea about the future development of the ports.

Batumi port is mainly focused on oil, but a new container terminal is being developed and will be operating soon. However, the capacity of the container terminal is limited to around 200,000 TEU. This is related to the location of the port in the centre of the city.

Poti port is currently relatively small in size (29 ha) but a new area will be developed of in total 400 ha. Since this area will have to be developed by a private party, the capacity of the port in terms of TEU is not yet known, but could be considerably higher than Batumi.

Both ports have relatively weak hinterland connections with the first forty kilometres of the railway track to Tbilisi being single track, and a lack of a double lane highway.

The ports of Odessa and Illiychevsk in Ukraine are managed using the port land lord model. Odessa Port mainly serves cargo related to Ukraine, while Illiychevsk grows as a hub for Ukraine, Russia and Belarus.

Odessa Port is located in the centre of the city and has a serious storage problem. To facilitate the growing container flows the port is working on the development of a dry port a few kilometres away from the port, and to be reached by a road bridge stretching several kilometres over the city. The economics of this investment project seem currently doubtful, given the fact that the solution may not positively influence port efficiency and the dry port might occupy quite valuable land.



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Illiyechevsk port has a good perspective in terms of expansion possibilities, and already attracts direct container vessels from China. Hinterland connections currently are not regarded as a bottleneck though investments in especially roads would be welcomed.

Transparency and predictability of tariffs

Though the Terms of Reference indicate that tariffs related to maritime links in the Black Sea are regarded as not transparent and unpredictable, the ports themselves, shipping agents and freight forwarders indicate no problems in this field.

The main problems mentioned in this field are uncertainty about the future development of the ports in Georgia and the possible effects on tariffs of privatisation and upgrading, while in Ukraine the monthly increase in rail tariffs and the three-monthly increase in port related fees were mentioned.

To tackle the latter problem it might be recommended to substantially increase tariffs and fees only once or twice a year instead of small changes every month or every quarter. In this way shipping agents and freight forwarders only have to negotiate prices once or twice a year, which might be more acceptable for their clients.

Priority investments

Especially the ports of Odessa and Illiyechevsk seem to have well elaborated investment plans for the coming 5 to 10 years, giving the possibility to assess the capacity of these ports in the longer term. The plans are described in the next section. Concrete investment plans are almost lacking in Poti and especially Batumi due to privatisation.

Results per port

Below the first results of the interviews conducted with stakeholders are presented, focusing primarily on current capacities, future development plans, opinions on rail ferry services and hinterland connections:

Georgia – Poti

General information

- Poti Seaport Ltd. acts as the port authority:
 - o 80% of all terminals are leased out to private operators
 - o remaining 20% (the Rail Ferry- and Container Terminal) are operated by Poti Seaport Ltd. themselves)
- Poti Seaport Ltd. acts also as dispatcher/coordination centre for all vessels
- Poti Seaport Ltd. owns and operates all service vessels (tugs, pilot boats, water supply, etc.)
- A new area of 400 ha (now the port covers 29 ha) will be developed by a private party; deadline for Expressions of Interest was October 15. This is a step away from the landlord model used in the current situation.

Organisations like shipping agents and freight forwarders are uncertain of the developments related to the privatisation of both ports since it is not clear what private parties are planning to do with the ports.

Current capacities

The container throughput of Poti port in 2006 is estimated at 127,000 TEU. In 2007 a growth of 25% is expected. Other ports in Georgia mainly handle oil. Poti handles some oil products (about 1 mio tonnes per year) but no crude. Alumina is transported via Poti – Baku – Turkmenistan to Tajikistan, where aluminium is made and transported back via the same route.

Investors from Kazakhstan have upgraded the existing grain terminal with better storage capacities and loading equipment. The export of Kazakh grain is 0.5 mio tonnes.

Willy Betz operates a RoRo ferry from Bulgaria, but containers are better than RoRo, therefore RoRo is not popular.



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The Dutch company Boskalis is currently upgrading the breakwater with so-called X-blocs. Poti port is hindered by mud coming from the river, so regular dredging is necessary.

Poti has a large passenger terminal which is not used because of lack of demand.

The main problem of Poti port is the limited space and berth length. The current container terminal is overloaded, and has only 2 ha of available space. The berth can only handle 1,000 TEU vessels. The current solution is to move containers out of the port as soon as possible.

Another problem is that the cranes are obsolete. Many times cranes don't function because of electricity problems or other mechanical failures.

Future development plans and capacities

Poti sees the potential of the TRACECA corridor, an alternative using Russian rail to bring goods from China to Europe is hindered by cold temperatures in Siberia.

Main objective is to reach 10 mio tonnes, by developing a new area (400 ha, now 29 ha). This new area will be developed by private investors. Expressions of Interest were requested by October 15. The investor has to develop the 400 ha plus a free industrial zone like the model used in Dubai. Apparently Sony had planned to build a warehouse there to serve the entire region, but retreated recently because of unfavourable conditions

If all plans are developed, Poti expects to have the capacity to handle 20 mio tonnes total. Poti aims to attract main deep sea container liners, instead of feeders from Illiychevsk.

Hinterland connections

Containers are transported to and from Poti by road (80%) and by rail (20%). Main problem with the rail connection is that the first 40 kilometres in the direction of Tbilisi is single track. The total distance between Poti and Baku is around 1,000 kilometres. Apparently a consortium (Transoil) has recently taken over the Georgian railways, and intends to exploit the railways like the British model. It is not clear yet whether this will positively influence the rail corridor connected with Poti.

Stakeholders indicate that investments are also needed in the road infrastructure, for instance a double lane highway to Tbilisi.

Rail ferry

Apparently the concept of rail ferry connections was supported by the former USSR. Rail ferry connections gave major strategic military advantages because of the possibility to transport large volumes of tanks relatively fast. The use of rail ferries for the transportation of goods was facilitated by introducing favourable port dues for these vessels. Apparently another reason to develop rail ferry transport in the past was to create better possibilities to reach Bulgaria from Ukraine while surpassing Romania.

Stakeholders in the port doubt whether the concept can continue to be used in an economically sound way in the Black Sea now port dues are also collected from these vessels. Furthermore, rail ferry facilities at ports are relatively large which may hinder the development of the ports. Last but not least is the problem with the wagons of which the use is much less flexible than for instance containers. In the past there have been problems with wagons between Bulgaria, Ukraine and Georgia.

Poti port has a rail ferry connection operated by UkrFerry with Varna and Illiychevsk. Poti and Illiychevsk have Russian gauge rail tracks, while at Varna a bogey exchanging station is used to transfer rail wagons to European gauge rail standards.

The relation with Varna is of less importance than Illiychevsk. It is estimated that only in one of five trips also the Port of Varna is included.



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Because of the political problems in the north of Georgia (Abkhazia), apparently Russia has tried to set up rail ferry connections between Kavkaz and Poti, mainly to facilitate trade with Armenia. For this the Russians modified a vessel (former tugboat) to be used as a rail ferry.

Currently three vessels call at the berth:

- Graveswald (Ukrainian vessel, Georgian flag), capacity 50 wagons, line Illiychevsk – Poti;
- 2 Bulgarian owned vessels, capacity 103 and 108 wagons.

The vessels are unloaded and loaded in 24 hrs. The Ukrainian wagons are directed all the way to Armenia and Baku, i.e. the cargo is not being transferred to Georgian wagons. The current throughput is some 18,000 – 25,000 tons per week; cargo transported comprises a.o. steel pipes and timber.

Tariffs

Shipping agents and freight forwarders indicate that there are no problems related to tariffs, in terms of transparency and predictability. Shipping agents however indicate that the necessary upgrading of port facilities should not lead to a tariff setting that makes competition with other ports difficult.

The current tariff for a 60 tonnes wagon transport by rail ferry between Illiychevsk and Poti seems to be USD 2,400, though also other figures (USD 1,200 – 1,500) were mentioned.

Georgia – Batumi

General information

- Batumi Sea Port Ltd (BSP) is the concessionaire of the Port of Batumi, duration of the concession agreement is 49 years. BSP is owned by the Green Oak Group.
- Currently BSP is holding talks with potential operators for the container terminal¹, it is expected that a lease agreement is signed with the successful bidder before the end of the year.
- The intention is to act in the near future more as a land lord concessioning all other berths and terminals except the oil terminal. Concessioning of the new container terminal is under way.

Organisations like shipping agents and freight forwarders are uncertain of the developments related to the privatisation of both ports since it is not clear what private parties are planning to do with the ports.

Apparently the turnover of the port has decreased with 50% the last months due to the uncertainty, though this has not been confirmed by other sources.

Current capacities

The main commodity handled are oil products (in 2006 about 12 mio tonnes), arriving from Baku. Apart from containers, also LPG is currently handled, though in small amounts. Other products handled include wheat, ammonium, sugar, general cargo, and quite large amounts of scrap.

Kazakhstan is the main key in transferring the cargo either through Georgia or Russia to Europe. The total value of goods transported from Kazakhstan each year is some 92 billion USD of which some 10% goes to Europe via Georgia, and 80% via Russia.

The main bottleneck in Batumi at the moment is the equipment which is outdated and needs to be replaced as soon as possible. Another bottleneck is the lack of storage space.

Furthermore, the port has a (minor) problem with swells which results in closing down the port on average 5 days per year.

¹ Latest news is that the Georgian branch of International Container Terminal Services Inc. (ICTSI) has acquired the new concession to develop and operate the container terminal, the ferry terminal and the dry bulk handling facility in the Port of Batumi in Georgia.



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Future development plans and capacities

A new container terminal will be given in concession to another private operator. The capacity of the new container terminal will be around 200,000 TEU. Also a new oil terminal is currently under construction

Hinterland connections

For a more detailed assessment of the hinterland connections see Poti Port. In Batumi, the apparently high rail tariffs in Azerbaijan were mentioned.

Rail ferry

BSP is not optimistic about the future of rail ferry connections. It seems commercially not interesting, requires special ships, jetties/quays (maintenance) and shunting stations, and in cases bogey change stations. Due to the lack of space at Batumi the rail ferry operations may be stopped. However, the rail-ferry landing berths are included into the container operator concession!

Tariffs

As in Poti Port shipping agents and freight forwarders didn't have problems with tariffs in terms of transparency and predictability. Only the relatively high railway tariffs in Azerbaijan were mentioned as a problem area.

Other sources indicate that since the privatisation, port fees have increased with something between 11% and 13%.

Ukraine – Odessa

General information

Odessa Sea Commercial Port is the port authority. It is state owned and manages the port via the landlord model. The port is located in the centre of the city.

Current capacities

The total current capacity of the port is some 30 million tons; the throughput in 2006 was 28 million tons, of which 15 million dry cargo and 13 million liquid bulk. Oil products are handled as well as LPG. The grain terminal has a capacity of 3 million tons.

In 2006 about 400,000 TEU has been handled in Odessa, with growth figures reaching 30% the last years. In 2007 it is expected that the port will handle 450,000 TEU. Hamburg Port Consultants (HPC) operates the container terminal.

Main problem of Odessa Port is the lack of storage capacity and the impossibility to expand because the port is situated near the centre of Odessa. For the container terminal this problem will be solved by building a new dry port/terminal a few kilometres away from the port. This area will be connected with the berths via an extension of the current bridge leading to the Customs area. The extension is about two kilometres.

Currently about 6,000 people work in the port, of which 3,000 for the Port Authority and 3,000 for private operators.

Future development plans and capacities

The problem of the lack of storage facilities for containers be solved by building a new dry port/terminal (50 ha) a few kilometres away from the port. This area will be connected with the berths via an extension of the current bridge leading to the Customs area. The extension is about two kilometres. One could argue that the expansion of the container terminal located so close to the centre of Odessa might occupy land and other resources that could find better destinations in the near future.

The total capacity of container handling, if all investment plans are realised, is estimated at 2.5 mio TEU.



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Apparently the port of Yuzny, north-east of Odessa, is developing fast in recent years and will also handle containers. Estimated maximum capacity the coming years is 1.5 mio TEU...

Other investment plans include the rehabilitation of the ship (repair) yard(s), the development of the passenger terminal, and a new container terminal at berth 29 expected to be completed early 2008.

Hinterland connections

The Port of Odessa is located near the centre of the city. Given the growing traffic congestion in the city, the transport connections to/from the port are not ideal.

The rail connection Odessa-Kiev takes one full train about one day, while small quantity cargo may take 5 days via rail. Road transport takes one day.

The rail connection Odessa-Ukraine/Russian border takes 3 to 5 days.

The rail connection between Odessa and Georgia takes about 9 to 10 days.

Rail ferry

Odessa has no rail ferry facilities.

Tariffs

As in Georgia, shipping agents and freight forwarders have no problems with tariffs in terms of transparency and predictability.

However, some stated that port costs increase about every 3 months while rail tariffs increase almost every month. The Port Authority stated that port dues were (almost) not increased the last years, and rising costs are related to increasing fees of private operators in the port.

Ukraine – Illiychevsk

General information

The Commercial Sea Port of Illiychevsk is the Port Authority. It is state owned and manages the port via the landlord model. The port is relatively large and has excellent possibilities to expand.

Current capacities

In 2007 the throughput of the port of Illiychevsk was:

- 6 mio tonnes bulk, of which
 - o 2 mio tonnes grain
 - o 3 mio tonnes import of mores
 - o 1 mio tonnes sulphur
- 1.5 mio tonnes liquid cargo, of which
 - o 1 mio tonnes vegetable oil (capacity is 3.5 mio tonnes - 4 terminals)
- 8 mio tonnes general cargo, of which:
 - o 3 mio tonnes metal (has decreased because of rail transport and change of production locations within UA)
- 1.5 mio tonnes via rail ferry (decreasing)

The port has the capacity for containers transshipment of 850,000 TEU per year. However, in 2007 only 500,000 TEU will be handled. In 2008 the capacity will be increased to 1 mio TEU.

Since 2007 four main container lines are calling to the port of Illiychevsk coming directly from China, and it is expected that very soon more lines will follow. This fits in the ambition of Illiychevsk to be a regional container transshipment hub (for the Ukraine, Russia, Georgia, Poland and Belarus), sharing the market with Constantza.



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The container terminal is operated by UkrTransContainer, a co-operation between the port itself and a Russian/Ukrainian consortium.

The container terminal is capable of receiving 6,000 TEU vessels. In the near future the port expects to receive 8,000 TEU vessels.

Furthermore, Illiychevsk is developing as a hub for the automotive sector, handling new passenger cars produced in Turkey and other countries like Spain, and transported via RoRo to Illiychevsk to be distributed to Ukraine, Russia and Belarus. In 2006, 40,000 cars were handled, in 2007 80,000 and the expectation for 2008 is 150,000 cars.

Future development plans and capacities

Main efforts are focused on containers. In 2008 the capacity will reach 1 mio TEU, in two years the capacity will reach 3 mio TEU. If additional investments are done, the capacity could grow easily to 4.5 mio TEU. The port tries to develop its container capacity in line with the expected market growth of about 30% per year. The new container terminal will be developed by a private operator. The port is considering focusing only on liquids and containers in the near future.

Hinterland connections

The main mode used for (land) hinterland connections is road transport (much preferred by clients) with about 90% market share, followed by rail. Also river transport is used to distribute cargo to the region.

The road connections need to be improved. There are plans to reconstruct and develop motor roads from motorways to the ports of Odessa and Illiychevsk, which are points where international transport corridors and Trans Black Sea going lines are connected.

Rail ferry

Illiychevsk has facilities to handle two rail ferry vessels at the same time. The rail ferry concept is considered only economically viable if the same gauge is applied at origin and destination, and only for specific types of cargo (bulk).

UkrFerry has opened in October 2007 a new rail ferry terminal in Kerch, but the facilities in Illiychevsk will continue to be used.

Tariffs

See Odessa.

Bulgaria

The ports in Bulgaria have not yet been visited to discuss the market analysis. However, some statistical work has been executed regarding transport flows within Bulgaria and between Bulgaria and other countries. The next graphs give an impression of the first results.

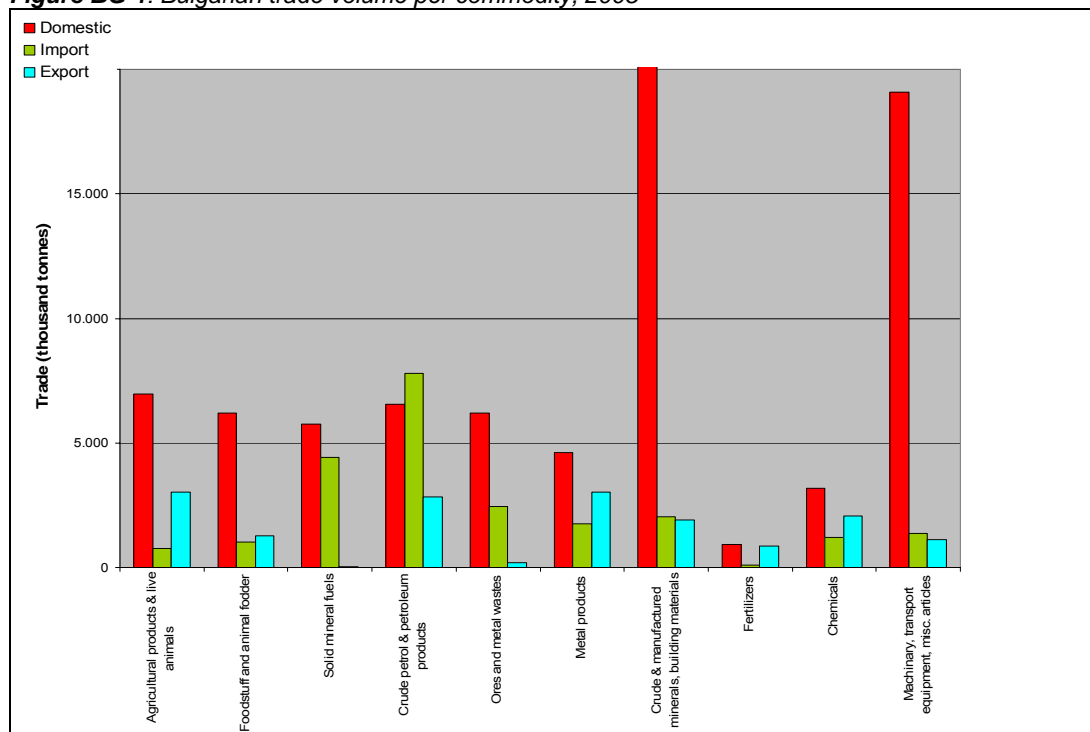


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Figure BG-1: Bulgarian trade volume per commodity, 2005



Due to the very intensive construction works, the predominant commodity transported in Bulgaria over the past few years were building materials (almost 100 million tonnes or 50%), 95% of which are transported domestically. These are followed by the end products (11%), fuels; both solid mineral (10 million tonnes) and crude oil and oil products (17 million tonnes) represent an important part of the freight volumes accumulating together 14% of the total volumes transported. The 2005 situation is shown in figure BG-1. It is expected that the volumes of end products, oil and oil products will increase, but construction material will still dominate in the next decade.

Figure BG-2 Bulgarian modal-split international transport 1995 – 2005

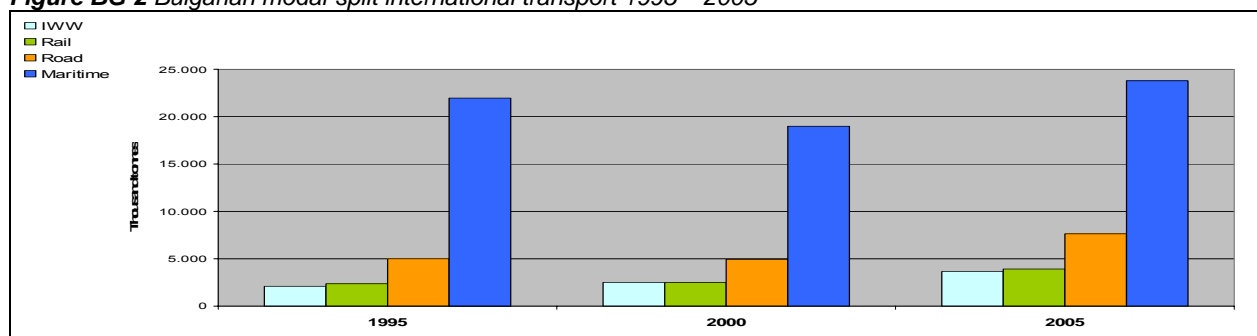


Figure BG-2 shows the modal-split development of Bulgarian international transport in the past decade. Although growing in tonnes the relative share of sea transport has slightly decreased from 69% in 1995, to 65% in 2000 and 61% in 2005. In the period 2000 – 2005 when the recovery of the Bulgarian economy started, the absolute volumes and the relative shares of land transport modes increased by more than 50%. The main reason for these trends is the increasing trade exchange between Bulgaria and the EU, served predominantly by road and rail, whereas the sea transport mainly serves the extra-Europe flows. In line with the expected further increase of intra-European trade, the land transport modes are expected to increase, providing room for an increase in inland navigation.

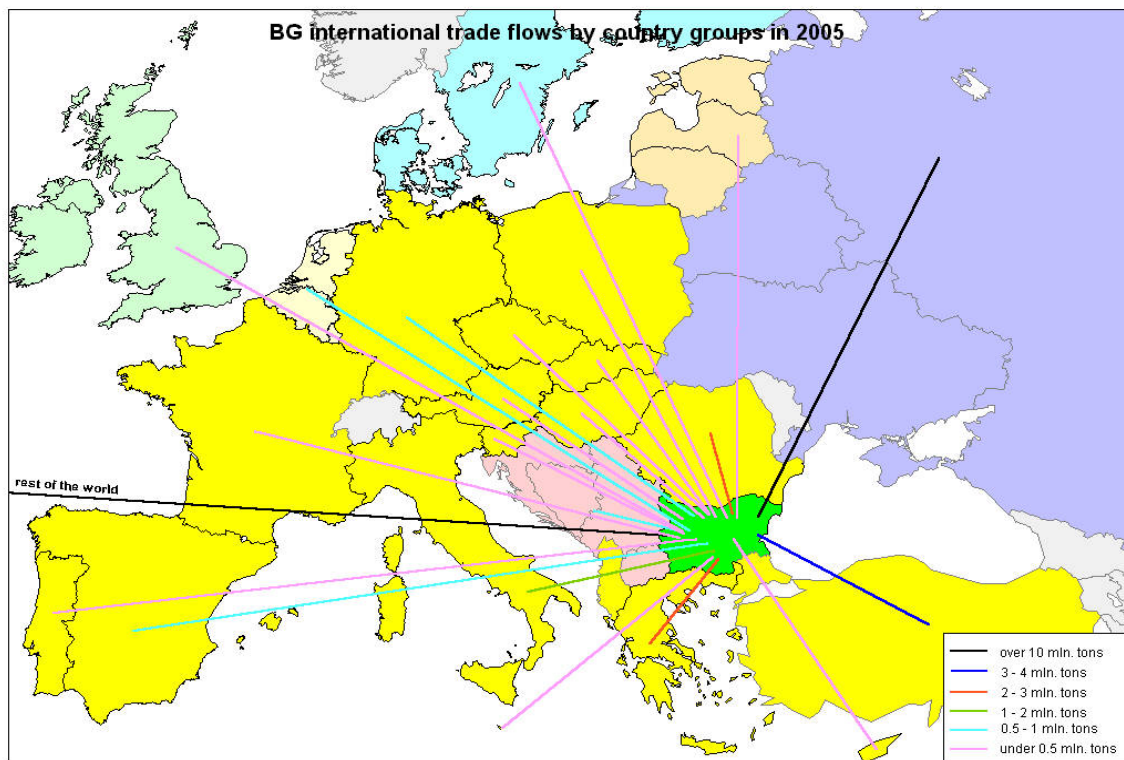


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Figure BG-3 Bulgarian trade partners by countries 2005



In 2005 the relative share of the volumes Bulgaria traded with extra-European partners accounted for 29%, which is similar to the total relative share of Russia and Ukraine (30%). In fact 98% of volumes traded with Russia and Ukraine are the import of crude oil and raw materials. The immediate neighbours of Bulgaria: Turkey, Greece, Romania, Macedonia and Serbia accounted for 24% of Bulgarian international trade volumes with 9.5 million tonnes.

Fig. BG-4 Transit freight traffic through Bulgaria 2005





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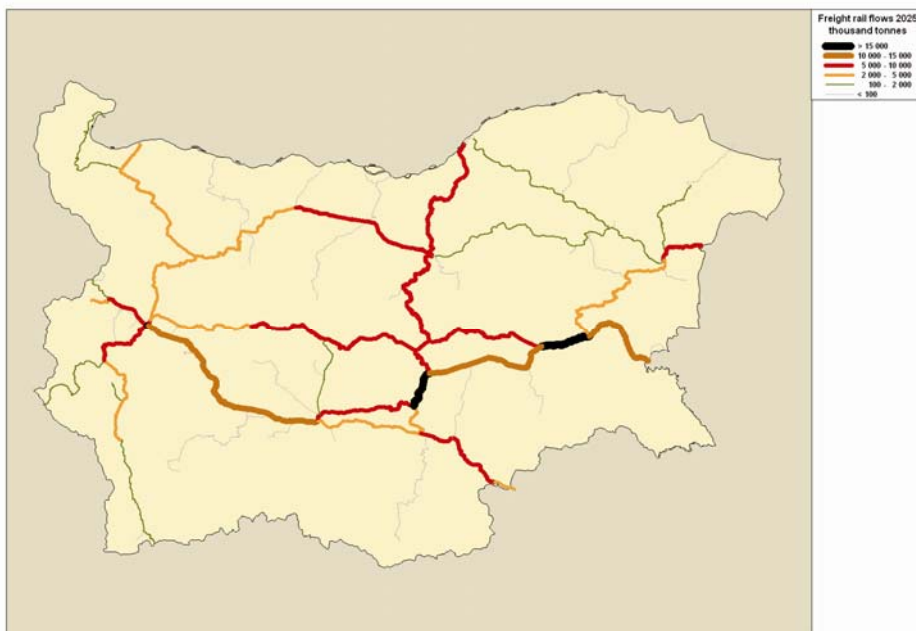


Patterns of international traffic and especially of transit traffic are very important when finding the common platform for the EU/global and national interests. This is especially relevant for the projects to be supported by the EU funds. Figure BG-4 shows the freight volumes and routes of freight traffic transiting Bulgaria in 2005.

Fig. BG-5 Bulgarian intra-zone freight flows by rail 2005



Fig. BG-6 Bulgarian intra-zone freight flows by rail 2025



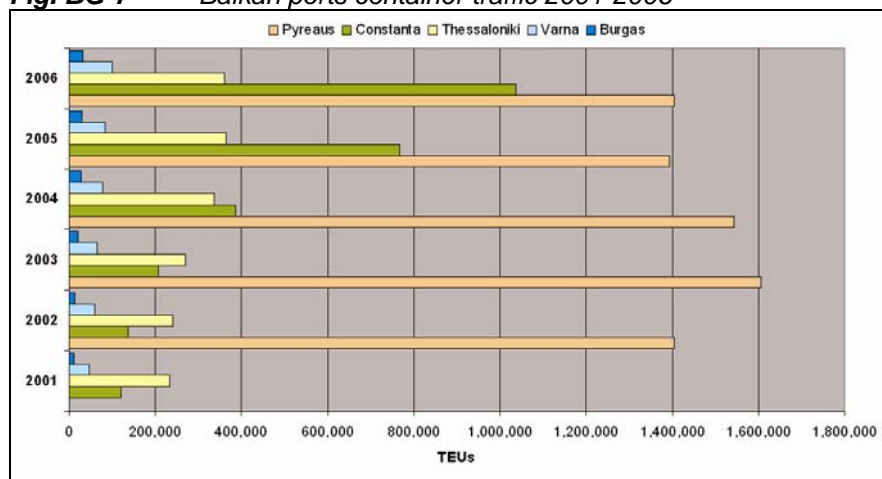


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Fig. BG-7 *Balkan ports container traffic 2001-2006*



Intermodal transport in Bulgaria is still lagging behind the EU and Balkan development trends. Figure BG-7 shows the annual container traffic in TEUs in major Balkan seaports. The market share of Bulgarian ports is some 4.5% and any future development will face strong competition from the Greek ports on the one side and especially of the Port of Constantan on the other. With regard to the rail sector the share of intermodal traffic is insignificant. Further development is needed before Bulgaria can make use of the potential market share.

5.1.2.2 *Deviations from Original Planning and Reasons*

As indicated in the proposal, a regional workshop will be organised to discuss the results of the market analysis with main stakeholders. This workshop is now planned for mid-February 2008. Compared to the earlier planning, the workshop is a little delayed, but the adjusted planning is still in conformity with the indicated time schedule in the Terms of Reference (Action Plan to be finalised 1 year after the contract is signed).

The reasons for this small delay are:

- during the summer period it is difficult to make appointments (the contract was signed April 16 2007, followed by a inception phase of two months and the summer holiday season, the actual work started in September)
- the co-operation of the ports is good in the sense that during the missions meetings could be organised with port authorities; however, the requested follow-up and especially requests for statistical data on cargo handled in the ports have not always been successful.
- the team wants to make use of statistical data on world trade flows which are currently being collected through DG-TREN projects like WorldNet.

5.1.2.3 *Specific Action Required from TRACECA National Secretaries and/or the EU*

According to the Terms of Reference recommendations should be made regarding transparent and predictable tariffs. This implies that in the current situation organisations related to maritime links in the Black Sea apparently have problems with the transparency and predictability of tariffs.

However, the organisations consulted in the first phase of the project have indicated that they do not have any problems with tariffs, except for the fact that especially port and rail fees seem to increase regularly. Also there is some concern that the modernisation of the ports will eventually lead to higher tariffs which may endanger the competitive position of the ports.



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The consultant would appreciate if some more information could be provided on the problems encountered in this field and the organisations which indicated these problems.

5.1.3 Feasibility Study Rail Ferry Terminal Samsun

5.1.3.1 Project Progress

In the reporting period, the port of Samsun has been visited, together with the Black Sea ports where rail ferry terminals are available: Illiychevsk, Constantza, Varna, Batumi and Poti. The port of Derince, which also has a rail ferry terminal, will be visited in the 2nd half of October.

The Team Leader has visited the port of Samsun in June and the Rail Ferry Terminal was not in operation. According to the information received from the Port management, the terminal has only been operational in the period 1986 – 1989, accommodating a regular rail ferry service with Constantza.

The Port Operations and Maritime Transport Expert has visited the rail ferry terminals in the following ports; Varna, Constantza, Poti, Batumi and Illiychevsk. A substantial amount of information was collected from these visits which will also be included in the Feasibility Study for the Samsun Rail Ferry Terminal.

Poti

Apparently the concept of rail ferry connections was supported by the former USSR. Rail ferry connections gave major strategic military advantages because of the possibility to transport large volumes of tanks relatively fast. The use of rail ferries for the transportation of goods was facilitated by introducing favourable port dues for these vessels. Apparently another reason to develop rail ferry transport in the past was to create better possibilities to reach Bulgaria from Ukraine while surpassing Romania.

Stakeholders in the port doubt whether the concept can continue to be used in an economically sound way in the Black Sea now port dues are also collected from these vessels. Furthermore, rail ferry facilities at ports are relatively large which may hinder the future development of the ports. Last but not least is the problem with the wagons of which the use is much less flexible than for instance containers. In the past there have been problems regarding ownership of rail wagons between Bulgaria, the Ukraine and Georgia.

Poti port has a rail ferry connection operated by UkrFerry with Varna and Illiychevsk. Poti and Illiychevsk have Russian gauge rail tracks, while at Varna a bogey exchanging station is used to transfer rail wagons to European gauge rail standards.

The connection with Varna is of less importance than Illiychevsk. It is estimated that only in one of five trips also the Port of Varna is included.

Because of the political problems in the north of Georgia (Abkhazia), apparently Russia has tried to set up rail ferry connections between Kavkaz and Poti, mainly to facilitate trade with Armenia. For this the Russians modified a vessel (former tugboat) to be used as a rail ferry.

Currently three vessels call at the berth:

- Graveswald (Ukrainian vessel, Georgian flag), capacity 50 wagons, line Illiychevsk - Poti
- 2 Bulgarian owned vessels, capacity 103 and 108 wagons

The vessels are unloaded and loaded in 24 hrs. The Ukrainian wagons are directed all the way to Armenia and Baku, i.e. the cargo is not being transferred to Georgian wagons. The current throughput is some 18,000 – 25,000 tons per week; cargo transported comprises a.o. steel pipes and timber.



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Batumi

Batumi Sea Port is not optimistic about the future of rail ferry connections. It seems commercially not interesting, requires special ships, jetties/quays (maintenance) and shunting stations, and in certain cases bogey change stations. Due to the lack of space at Batumi rail ferry operations may be stopped. However, the rail-ferry landing berths are included into the container operator concession!

Illiychevsk

Illiychevsk has facilities to handle two rail ferry vessels at the same time. The rail ferry concept is considered only economically viable if the same gauge is applied at origin and destination, and only for specific types of cargo (bulk).

UkrFerry has opened in October 2007 a new rail ferry terminal in Kerch, but the facilities in Illiychevsk will continue to be used.

5.1.3.2 Deviations from Original Planning and Reasons

According to the planning as included in the Inception Report the activity 2 has not yet commenced, though as indicated before, the Team Leader and the Port Operations and Maritime Transport Expert have visited a number of rail ferry terminals in other ports than Samsun.

5.1.3.3 Specific Action Required from TRACECA National Secretaries and/or the EU

No specific action is required at the moment, the Port Operations and Maritime Expert will visit the Port of Samsun in the second half of October. It is also planned to have a meeting with the Turkish Ministry of Transport and the Ministry of Railways (TCDD) in order to discuss the rationale of the possible upgrading of the Rail Ferry Terminal in the port of Samsun.

5.1.4 Safety and Security

5.1.4.1 Project Progress

General

The Safety and Security expert went on his first mission from 16th to 28th of September.

This mission covered Bulgaria and Romania.

Bulgaria:

Meetings in Sofia, Burgas and Varna
Visit of the port in Burgas and Varna

Romania:

Meetings in Constantza and Bucharest
Visit of the port in Constantza



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Results

For Flag and Port State Control of ships, Bulgaria and Romania have taken the necessary measures to ensure their share of control within the framework of Paris Memorandum of Understanding – MOU (since January 1, 2007) and of the Black Sea MOU (since 2000).

The control methods are defined by the regional MOU, following the instructions of the IMO resolutions A 787 and 882.

The organization of these controls can be defined in a management system which will ensure their quality ("Quality Insurance" concept).

Bulgaria and Romania are well organized for those type of controls and appear to have sufficient qualified personnel to ensure the necessary control within the framework of a global safety and pollution prevention management system involving ships.

The Safety and Security expert was not permitted to check the application of the ISPS code on ships of Bulgarian flag or Romanian flag (that is quite difficult to perform because the destiny of a ship is...to sail around the world!). But during quite targeted interviews on the methods to verify the conformity of security assessment and plans or conformity operation of a ship, it seemed that the inspectors met are carrying out these audits in a very professional manner.

The verifications carried out by Bulgaria and Romania administrations are apparently in conformity with the ISPS Code and can be integrated easily in a possible future common management system for the verification process of ship's security. Reminder: in case of serious doubt, the PSC verifies only the presence of the ISSC (International Ship Security Certificate). The security plan of a ship includes a confidential part and a thorough verification requires the formal authorization of flag authorities. This ISPS code requirement is constraining and will not facilitate the Port State Controls on ships security as effective as those already existing for management of ship's safety.

Bulgaria and Romania have relatively small lengths of coast and thus a limited number of ports. The differentiation between international or national shipping trade does not mean anything for these countries. In a word, the voyages carried out along their coasts are only international.

The ILO guidelines on port operations (Code of Practice "Safety and Health in Ports") seemed not or a little known at all by our Bulgarian and Rumanian interlocutors (they expressed their intention to get the book from ILO). On the other hand, ISGOTT of OCIMF and SIGTTO guidelines are well known as well as the various IMO codes.

This vigilance is already taken into account in the project of privatization of port facilities from the Bulgarian Ministry of transports; the "fitness", claimed from the future operators, includes safety and health of port workers.

The harmonization via a common management system in each port is thus possible while taking as reference codes:

- ILO guidelines for Safety and Health in ports
- ISGOTT for Oil Terminals
- IMO relevant codes for certain specific terminals

However, if we want effective and protected sea traffic between the partners of the Black Sea, like elsewhere, it is necessary to envisage heaving up all ports to a minimum security level.

This is what the ISPS Code and the European regulations are intended to reach.

Any way, we find two different situations in the two visited countries:



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a. Bulgaria

Bulgaria has chosen a very broad identification of the Port Facility by joining together for example the West port and the East port (in Burgas as well as in Varna). If other specialized terminals are well differentiated, in this case the Port Facility is nevertheless compliant to the ISPS Code. The PFSO (Port Facility Security Officer) can be the same person when the circumstances allow it (ISPS code A 17.1).

However, when a terminal is operated by a private operator and the PFSO is a member of the Port Authority, there is doubt about its authority on the security of the terminal and the necessary resources which can be allocated for security maintenance and improvement.

During our visit, the information appearing in the IMO/GISIS data base was rectified following our interrogations. This update was about appointments of the persons newly responsible for port security at national level.

If the implementation of the ISPS code and the European regulation 725 was carried out, it is not the same for the directive 65/2005.

Indeed the port security plan may exist but the Port Security Officer is not clearly appointed in the two visited Bulgarian ports.

In our opinion, there is a total incomprehension from the Bulgarian Authorities of the logic of a PSO (Port Security Officer) since a PFSO seems mainly occupying this position!

This incomprehension starts with the bad interpretation of the Port facility concept and the PFSO (Port Facility Security Officer). The situation is not easy and the Europeans inspectors have had to point out that.

The only solution lies in the opportunity of the future privatization of terminals. The conditions for the private operator will have to incorporate some obligation in the responsibility of security and safety of operations in the new private terminal.

We expect that the security of the sea area will remain in hands of the port State.

In conclusion for Bulgaria: the situation is viable in the current state with however the implementation of the directive 65/2005 requirements and thus by designating officially a Port Security Officer in both ports...when the setting "in conformity with the ISPS Code" of the various terminals will be carried out naturally at each concession. The requirements for compliance in safety and security matters should not disturb the process to tender. However, they cannot be forgotten except deferring this load on the port itself, like previously and ... there could be a significant risk of lack of resources to set and maintain the conformity with both International and European requirements!

b. Romania

For Romania the situation is clearer for the simple reason that the Port Authorities have well understood the concept of "Port Facility" according to the ISPS Code.

By consulting the GISIS database and throughout interviews, the port facilities are apparently well defined and the PFSOs ensure necessary contact points with shipping companies and ships. The number of port facilities is, for example, 64 in Constantza all of them with an approved security plan and a contact point. High risks port facilities are enclosed and managed in an adequate way (we have been able to carry out some tests)

The implementation of directive 65/2005 was taken into account, but it was not possible for the Security expert of the project again to check that the Port Security Plan exists (Romania and Bulgaria had apparently 6 months to put themselves in conformity after their entry in the European Union).



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The inspectors of the European Commission came in June this year and the results have been communicated to the authorities.

It was not possible for me to see the results in Romania or Bulgaria but it was pointed out to me that these results were dispatched without complementary questions.

The Security expert will contact the Inspectors of the EC to discuss the results of the security inspections.

Conclusion

Maritime and port safety are at a good level in these two countries.

Maritime and port security are also at a good level with however a security organization in the Bulgarian Ports which is not in conformity with the requirements of the ISPS code nor with those of the European directive 65/2005.

The prevention measures against the security incidents set up in the ports of the two countries are of a good level while the seaside protection remains under the responsibility of the National Navy and Border police. Such a protection ensured by national units relates to territorial waters and all ports. For the moment there is no seaside protection carried out by a Port facility itself.

If the elements corresponding to the security of port facilities appear in the GISIS data base, the information concerning the safety of the same ports which could be of a great utility for companies and ships, appear sometimes only on the port website and in a too brief manner.

We will suggest some improvement in order to make this information available for shipping companies and ships' captains.

5.1.4.2 Deviations from Original Planning and Reasons

The visit to Romania started from the two ports instead of visiting Maritime and Port authorities in the capital Bucharest.

Indeed the proximity of Constantza and Varna was taken into account to modify the planned schedule and also that all security authorities appearing in the IMO GISIS data base were situated in Constantza.

5.1.4.3 Specific Action Required from TRACECA National Secretaries and/or the EU

Security documents

To be able to consult Security Assessments or Plans of Ports Facilities as well as Ports, the Safety & Security expert is to be officially authorized by the Ministry of Internal affairs in each country.

At the other hand, if the security assessments or plans are without a translation in English, the Safety & Security expert is only able to verify their existence, and nothing more!

It is hoped the EU inspectors have had that kind of authorization and they were able to check an English version of the documents when they came for inspection.

We understand the compliance of Maritime and Port Security with European regulations have been checked by these European inspectors and relevant reports issued. To be able to propose improvement in management of safety and security, the Safety & Security expert should be able to consult the results of these EU inspections.



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To consult these results, the Safety & Security expert should be officially authorized by the European Commission and maybe by the representatives of Bulgaria and Romania in Brussels.

This consultation could be carried out in Brussels in order to keep the necessary confidentiality in these matters.

Information on Security Threats

The Safety and Security expert was informed by both Bulgarian and Romanian port authorities that any information on local security threats are available only from the Ministries of Internal Affairs.

The Safety & Security expert suggests that this information is to be transmitted to him via some official way after a request from the TRACECA National Secretary.

Actions Requested by the TRACECA National Secretary for the next visits in the region (Turkey, Georgia and Ukraine)

From now, in each capital the Safety & Security expert should meet a representative of the Ministry of Internal Affairs in order to get, in total confidentiality, the necessary information on the local security threats.

5.1.5 Port Community Systems

5.1.5.1 Project Progress

This document contains rather detailed information concerning the (non) existing automated systems/applications in the concerned TRACECA-countries and the 11 project ports.

It should be clear that this reflects a situation on a certain date/time and accordingly of what was told/shown by local involved persons/parties/organisations/... and/or found out (e.g. via Desk research and/or Internet) by the ICT key-expert (whether by checking the given information, whether through in depth search).

- Inception/Acquainting tours:
 - o mission 1 in May
 - o mission 2 in June
 - Operational/local mission 3: Bulgaria (Varna & Burgas)
 - Operational/local mission 4: Georgia (Poti & Batumi)
 - Operational/local mission 5: Ukraine (Odessa & Illiychevsk)
1. The missions 1 & 2 were mainly organised to
 - a. present the project and the team,
 - b. meet the national Traceca co-ordinators and
 - c. meet the involved local port management
 - i. = those people who, after the official/operational start-up, will be involved
 2. This resulted in an **inception report** (delivered beginning of July 2007), followed by some comments by the EU-project officer(s).

B. As per the results:

Result 3: I welcome the satisfactory status of ISPS implementation within the Black Sea region and eagerly suggest that the Project Team meets EMSA responsible for the SAFESEA NET in order to identify specific areas of mutual benefit and interaction.



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Result 4: It is noted both Port of Varna and Port of Poti are currently developing their own websites. This represents an excellent opportunity for the Project to promote the exchange of information between both port authorities and between both national competent authorities.

This could even become an initial common maritime information system shared by Black Sea countries.

These comments/remarks were analysed and, for result nr. 4, answered/commented by the ICT-expert:

- As per the results:

Result 3:

It should be clear that staying within the (original) scope of the project is essential (to be able to respect the planning).

Now already we lack and (or are short in) time to write the MoM's as a result of the complex missions (logistical).

Mixing Safety (& Security-ISPS) and SSN is in my view not wrong, but is extending the scope. A supplementary trip to Lisbon EMSA HQ (to talk to the EMSA/SSN representatives), although very interesting, must be foreseen and arranged.

SSN is THE hot issue and in SSN-V2 changing from the index-server principle towards DB is considered.

Contacts were made (via Mr. Texier and Mr. Sarasua Ibarburu), but do not resolve the requested initiative

See also remarks in Result 4.

Result 4:

- Even within the EU there seems to be a serious misinterpretation of definitions. The ports of Poti and Illiychevsk indeed developed an own website, but as already mentioned so many times: the developed websites are Port OPERATOR'S WEBSITES (see further).
- The EU-comments only describe the "the exchange of information *between both port authorities and between both national competent authorities*".
 - This is *not* the basic concept of an overall PCS.
 - Exchanging info between authorities *may* look as essential and of great priority, but is only a part of a PCS (it is the automatic result of the one stop shopping PCS).
 - A PCS is meant to *facilitate* the trade & the communication (incl. the accompanying documents/papers) through a Single Window principle (or One Stop Shopping).
 - The sources of this information are the (mostly) private port users (ship/liner agents, (freight) forwarders, operators, service providers, etc.) and not authorities, as they are *users* of the information.
- It should be cleared *very soon* (& rapidly) what is meant (& wanted) exactly by:
 - a PCS for "the exchange of information between both port authorities and between both national competent authorities"?
 - or "a common maritime information system shared by Black Sea countries"
 - o and no more mentioned 'a PSC'
- even more surprising:
 - o "It is noted both Port of Varna and Port of Poti are currently developing their own websites"



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- these 2 websites which are developed are not real 'port authority websites' but the homepages of 'port *operators*'
- the case of Poti (vs. Batumi) being even more complicated

3. In addition, the following recommendations are given:

0. General remark on this item:

- in my opinion there is mix-up:
 - . these recommendations refer to 'general' and
 - . not to specifically Result 4: PCS (may be except nr. 2 Content)

1. Language

- Website to be *build*? I suppose the EU refers to the project website?
- But in case a PCS is meant:
 - o As I already mentioned several times (also to be stated very clear into the inception report)
 - Within the project deliverables there is no space to build a PCS
 - A demo-version (depending the available funds in e.g. access, flash, ppt; of which flash and/or access must be done by a local expert) will be drafted as a pilot project.
 - 3/4 languages?
 - I can not find any document in which 3/4 languages are mentioned

2. Content

- the knowledge/perception of 'a' PCS is quite different
- I note that:
 - o Only messaging with regards to public function communication should be done/treated.
 - o I also note that *only* Varna & Poti should be treated?
 "It is noted both Port of Varna and Port of Poti are currently developing their own websites. This represents an excellent opportunity for the Project to promote the exchange of information between both port authorities and between both national competent authorities. This could even become an initial common maritime information system shared by Black Sea countries".

3. Methodology

- what 'beta website' is referred to?
- in my opinion one refers to the TRACECA-project website?

5.1.5.2 *Deviations from Original Planning and Reasons*

- Up to now no deviations from the original planning have to be noted
- Missions were done as planned, only 1 remaining (with an even more strange port-management structure -> including the Turkish Railways – TCDD, as a port operator/manager)
- I foresee some future problems if the problems (as mentioned above) will not be solved quickly; being:
 - First of all and in my opinion the most difficult/essential:
 - o a clear difference between and in view of separation of responsibilities and or functionalities (working fields):
 - private and public port community actors
 - service providers in the strict sense of the word (cfr. EU-regulations)
 - public port- and maritime authorities (cfr. W-European ports – except British ports)
 - private port authorities (Batumi and may be Poti)



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- private port operators & state port operators
- Information exchange between authorities only?
 - which would mean that in fact only SSN should be explained and shown
 - and which would mean a much closer cooperation between result 3 & 4 (as mentioned higher)
 - but what I, personally, do not think is the case as everywhere one speaks of a PCS
- Information exchange from port community actors towards authorities only?
 - being the so-called Harbour Master's messages
 - BERMAN – for announcements (incl. updates/changes) of ship's arrival/shift/departure
 - incl. ordering services (pilots, tugs, etc.)
 - IFTDGN – for announcements (incl. updates/changes) of dangerous goods (to be loaded/discharged, in transit)
 - if needed cross-ref.
 - IFTMCS – for announcements (incl. updates/changes) of ship's manifest
 - PAXLST - for announcements (incl. updates/changes) of ship's crew/passengers
 - WASDIS – for announcements (incl. updates/changes) of ship's waste disposal/collection

5.1.5.3 Specific Action Required from TRACECA National Secretaries and/or the EU

From the EU:

- an clear vision, even statement, on the way to be followed:
 - either single window approach via PCS, and in a next phase linking with SSN
 - either SSN as a result of (non) existing PCS for information exchange with safety & security as main issues

From the TRACECA National Secretaries:

- better (and more in advance) arranging meetings
- especially by Y/N inviting
 - the right organisations/departments; e.g.
 - harbour masters' services which were to be suspended
 - customs/border police were never invited
 - the right persons
 - for my result I (very) often encountered counterparts without any notion of PCS
- avoiding losing times through too much (national) centralised coordination

5.1.6 PPP and Bankable Projects

5.1.6.1 Project Progress

Work on this result commenced as planned in September 2007. To this date the following activities have been carried out:

- development of 4P framework;
- mission to Sofia, Bulgaria (October 2007) including visits to relevant departments of the Ministry of Transport and Port Infrastructure Company;
- analysis of state-of-the-art in Bulgaria (port infrastructure investment plans, legal and institutional framework relevant to PPP and port investments, PPP experience);
- identification and contacting of local legal experts in view of their recruitment to assist in analyzing current PPP framework in five TRACECA countries concerned.



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Bulgaria, Georgia, Romania, Turkey and Ukraine



5.1.6.2 Deviations from Original Planning and Reasons

There are no deviations from original planning.

5.1.6.3 Specific Action Required from TRACECA National Secretaries and/or the EU

The missions involve meetings with high-ranking officials in the central ministries (transport, seaport administration/investments, finance, PPP-unit, etc.). Intervention of TRACECA National Secretaries may be required if own attempts to arrange meetings with relevant officials are not successful.

5.2 Project Objectives and Deliverables

5.2.1 Overall

Overall Project Objective:

“To facilitate trade along the corridor Europe - Black Sea Region – Caucasus - Central Asia by increasing its competitiveness and attractiveness as stated in the Basic Multilateral Agreement for International Transport for Development of the Europe-Caucasus-Asia corridor”

Specific Project Objective:

The project's purpose is to create the basis for the improvement of maritime links in the Black Sea region. This relates to reliable, safe, secure, competitive and efficient shipping and port services and to enable viable links with the Trans European Networks mainly with regard to rail ferry, Ro-Ro ferry and container services.

5.2.2 Market Research and Action Plan

Result 1

An in-depth market research of the actual maritime transport situation in the Black Sea area is drafted and support in implementing a successful marketing policy is provided to the relevant ports and shipping lines in the Black Sea area. Marketing strategies are developed, comprising not only PR, advertising and other means of communication to the clients and the public, but also ranges from systematic market research to the determination of services to be rendered, optimised tariff setting for the services, quality and safety/security management. A more transparent transport tariffs and transit fees structure applied in maritime sections of TRACECA corridor are developed, which will finally result in predictable prices on this route. Removal of illegal and non-physical barriers for transport services shall be promoted, in order to ensure customers' confidence and increase the attractiveness of the route. The Black Sea ports capacities, as stations for forming, accumulating, depositing, redistributing, forwarding and receiving freights will be used maximum effectively. Further on, these ports will be converted into centres offering optimal logistic schemes and more effective use of the ferry lines and the combined transport to the carriers.

Objectives

Main objective of the market research on maritime transport in the Black Sea area is to support the ports, shipping lines and other actors involved in maritime links in the Black Sea in their development as



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important elements in current and future logistics chains along the TRACECA corridors. The main element for this support is a forecast of transport flows in the Black Sea area for the year 2020. By presenting a forecast for transport flows for the year 2020 ports, shipping lines and related organisations will be able to focus their development plans in line with market demands. In this respect especially the forecasted number of containers is essential, given the increasing containerisation, the developments in the trade Europe – Asia and the current lack of capacity of container terminals in the Black Sea ports. On the basis of the results of the market analysis an action plan will be determined including recommendations for a more balanced and transparent tariff setting, recommendations on additional logistics services to be established, identified priority investments and stages for further technical assistance.

Deliverables

- Draft report on the results of the market analysis, January 2008
- Workshop on results of market analysis with main stakeholders, mid February 2008
- Draft action plan, March 2008
- Final action plan, mid April 2008

5.2.3 Feasibility Study Rail Ferry Terminal Samsun

Result 2:

A Feasibility study is provided on the provision of a better Railway – Sea combined transportation (railway ferry transportation) between Samsun port and other TRACECA countries located on Black Sea coast, and hence to set up commercial links especially between Turkey, Georgia, Azerbaijan, Turkmenistan, Uzbekistan and other TRACECA countries to which there is no direct rail link from Turkey at present, except for the connection to Bulgaria. The study findings should provide all the necessary information to further discuss and decide the eventual resuming of the rail ferry services at the port of Samsun and on the technical, economic, financial and environmental feasibility of the construction of a bogie exchange station.

In Phase 2, a feasibility study for the upgrading (a.o. the installation of a bogey-exchanging station) of the rail ferry terminal in Samsun is to be executed.

5.2.4 Safety and Security

Result 3:

Existing safety and security management systems are improved in the respective countries and adjusted in order to achieve proper interoperability and to comply with the IMO (International Maritime Organisation) International Code for Ships and Port Facility Security (ISPS Code). Favourable conditions are laid down for the creation of a common security management system applicable for the maritime transport and operation in the Black Sea area in order to reduce risk levels and to protect port facilities, ships, environment and people.

5.2.5 Port Community Systems

Result 4:

A pilot scheme for efficient port communication and information system, which facilitates and fastens maritime transportation within the Black Sea region, is established and findings are disseminated. That implies tracing of movements and handling of the ships in the ports, tracing and control of cargo-handling operations and information services of outer clients. For the pilot scheme the port of Varna is to be envisaged, provided the information obtained in the review phase (please refer also to result 1) does not suggest otherwise.

The most important questions to be answered, through key-personal interviews, in this task are:

- Which are the various parties in the D2D-supply chain and



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- Which are involved in a 'Port Community'
- Which parties possess (or buy) door-to-door data and
 - for what purposes are the data used?
 - a typical, sometimes forgotten, reason is 'statistics'
 - do they want to share this information in exchange of other (missing) data?
 - are the parties willing to collect and register those extra data?
 - what are the implications in terms of workload/investments?
- Which information/data are missing and
 - what is needed to obtain those data?
- How can all these data be collected to establish a PCS?

More reliable data has to be collected.

Via a bottom-up approach information should be gathered both on statistical needs of policy makers and data availability at supply chain parties.

There seems to be an ambiguous interpretation of

- 'Port Community Systems/Services' (or Portals)/port & Portals-PCS/Country/Black Sea
- Waterway managers & Ports
- What information to be exchanged
 - between (Port) Authorities only (as suggested in the comments by the EU project officer on the Inception report)
 - between the Port Community and other involved authorities (the so called: Harbour Masters' Messages)
 - between whatever organisation/system and SSS

3 main systems may be used

- fully EDI/EDIFACT (cfr. Antwerp APICS/Port Actors via SEAGHA)
- fully Web (cfr. Rotterdam with PortInfoLink) or
- web-enabled (cfr. Finland with PortNet & Port of Ghent with ENIGMA)

Depending the (organisational, hierarchical & operational) structures (and consequently the view of the involved managements), one may state that:

1. Creating a Portal able to provide **general and specific data** about the *specific* port
2. Creating a **visit card** of that port, able to be accessed by the Internet users from the country and abroad.
3. Presentation of the **main advantages** of the business in the port in order to attract potential collaborators, especially from abroad.
4. Presentation of the **updated data** about all companies and services they provide in that port
5. Up to date presentation of **specific data about (maritime) transport/navigation**, such as
 - a. ships movements (and general cargo information)
 - i. (pre)announcements/arrivals, ships in port(s), shifting, departures, etc.
 - b. oro-hydrographical information
 - c. weather report.
6. Easy entry and retrieval of all the data needed to portuary community members in order to **carry-out his business** in good conditions
 - a. via automated, interactive applications (single window web-application (or web-enabled))



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TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



5.2.6 PPP and Bankable Projects

Result 5:

In a first phase a Port PPP (4P) Framework is developed for (i) the identification of Public Private Partnership (PPP) opportunities in the port and maritime transport sector on the TRACECA routes, (ii) the assessment of the added value of PPP (with respect to traditional, public procurement solutions), and (iii) the optimal design of PPP constructions in order to effectively achieve this added value. In a second phase, the 4P Framework is applied to the investment needs and project plans in the region. The outcome of this exercise is an assessment of the PPP potential of these investments, and a selection of Bankable Projects.

5.2.6.1 Objectives

Phase I:

- Establish **state-of-the-art** of PPP in infrastructure sector (especially seaports) in the five TRACECA countries concerned (legal and institutional framework, experience, plans)
- Development of a **Port PPP (4P) Framework** developed for (i) the identification of Public Private Partnership (PPP) opportunities in the port and maritime transport sector on the TRACECA routes, (ii) the assessment of the added value of PPP (with respect to traditional, public solutions), and (iii) the optimal design of PPP constructions in order to effectively achieve this added value. The “ideal” 4P Framework is compared to current conditions and practices in the five TRACECA countries concerned, resulting in general (i.e. not project-specific) policy recommendations.

Phase II:

- Application of the 4P Framework to the investment needs and project plans in the region. The outcome of this exercise is an **assessment of the PPP potential** of these investments, and a selection of **Bankable Projects**.
- **Project-specific recommendations** on PPP models/procedures

5.2.6.2 Deliverables

Report divided into two parts:

- **general section** presenting some relevant background information on PPP for investments in public transport infrastructure (why?, how?, types of PPP projects, etc.), and describing the 4P framework mentioned above.
- **country-specific sections** covering:
 - the legal and institutional framework within which PPP projects must be undertaken;
 - PPP experience to date (especially in ports);
 - selection of bankable investment projects contributing to the development of TRACECA-TEN maritime links;
 - recommendations on how to realize this specific project in a PPP (e.g. with respect to PPP construction, tender management and project management);
 - general (not project-specific) recommendations to improve the 4P framework in the country.



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TRACECA and TENS Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



The report will be completed in the second phase of the project. Interim versions of the report will be published in the form of a working paper. The working paper at the end of phase I will contain the completed 4P framework.

Regional workshop on PPP and bankable projects

- Presentation of selection of bankable projects
- Recommendations on PPP models/procedures to implement these projects (including application of procedure based on the “competitive dialogue”)

National workshops

Some national/sub regional workshops (number and location dependent on national interest) for concession and public procurement officials on tendering and managing PPP projects (with focus on implementation of competitive dialogue) are to be organised in Phase 2 of the project.



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TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



5.3 Project Execution in the Reporting Period

5.3.1 Staff Input and Incidental Expenditure

Herewith follows an overview of the resources used over the period 16 April – 31 October 2007.

	Total Budget	Used in Period	Percentage used to date
Team Leader	420 person-days	116 person-days	28 %
Key Experts	595 person-days	132 person-days	22 %
International Non-Key Experts	449 person-days	70.5 person-days	16 %
Local Non-Key Experts	449 person-days	28.25 person-days	6 %
Total staff input	1,913 person-days	246.75 person-days	18 %
Incidental Expenditure	€ 570,000	€ 37,435	7 %
Expenditure Verification	€ 15,000	€ 0	0 %
Total Project Budget	€ 2,249,600	€ 371,228	17 %

Incidental Expenditure used in this period includes:

- Travel to and in the region (except for travel between Sofia and home country after 1 September 2007)
- Daily subsistence allowance (except for Sofia, after 1 September 2007)
- Rent and operating costs Regional Project Office Sofia

5.4 Constrains, Risks and Assumptions

5.4.1 Market Research and Action Plan

The consultants have encountered some difficulties in obtaining statistical data from the ports, but will continue to request this data with the required detail.

5.4.2 Feasibility Study Rail Ferry Terminal Samsun

No constrains and risks encountered during this reporting period.

5.4.3 Safety and Security

Constrains

The confidentiality of security documents is constraining. Any person willing to consult ship or port security plans has to be agreed by National Security Authorities.

The national language use for security related documents is constraining for us.

Risks

The quality of the management of maritime risks could be lower than expected. Any management system includes verification of functioning; so normal care should be established to organize and conduct the future internal audits within a common management system.



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Assumptions

Conformity to International and European regulations of the preventive measures taken by the Bulgarian and Romanian authorities will ease the implementation of a common management system for Maritime and Port safety and security.

If the common management system expected seems to be welcomed, the success of such system will be suspended to the involvement of head of departments and the quality of the future internal audits.

5.4.4 Port Community Systems

This report was prepared after 5 missions.

It should be noted that not one PCS is in operation; even worse: not one port has an overall port management system (Constantza to be seen as an (technical) exception – by law the port, although a 100% state owned port operator, was awarded the management of the port as a 'port authority').

There even are no clear rules/procedures of announcing ship's arrivals. Everybody enters data as they receive it (whatever the source might be; e.g. (mostly) physical documents, AIS/Radar information, etc.)

The most difficult issues encountered were:

- language: poor to bad English
 - o even with the help of translators it was hard (issues being too technical)
- bad project information and follow-up in the Traceca countries
- very bad know how concerning ICT and especially concerning PCS
- cargo operators are almost everywhere automated (because it's in their own interest)
- maritime (naval) administrations are automated everywhere in the same way (cfr. waterway managers in W-European waterways)
 - o VTS (Radar, ..)
 - o VT(MI)S (DBs, AIS, ...)
- port administrations (!! definition to be very careful with): almost also automated towards statistics/invoicing
- complexity of organisations/departments/structures and hierarchical steps
 - o on all levels
 - o centralistic approach (ex-communist system)
 - o authorities vs. other organisations: very complex
 - o some ports pretend to be landlord ports but are in fact also operators
 - o other ports pretend to be private but still are the traffic regulators (via the typical 'dispatcher' functions)
 - o maritime administration is sometimes scattered around and without real defined responsibilities/functions
 - we even encountered harbour masters' services which had almost nothing to say/do as they were in a status of being reorganised/wiped out
 - o too strict border lines between involved parties
 - everyone pretends to be the beginning of the cycle
 - e.g. ship's arrival announcement
 - resulting in the fact that everyone duplicates all necessary documents and
 - brings all the documents to all involved (public/private) authorities
- no good communication between (port) community members
 - o mainly as a result of language and lack of know-how on the specific issue
- lack of standardisation and differences in interpretation of definitions
- not one of the agreed 'to do' items was fulfilled (see MoM)
- transfer of expertise/know-how (will) not (be) easy



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TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



5.4.5 PPP and Bankable Projects

With respect to the desired outputs of Phase I (4P framework and country state-of-the-arts) the risks are very limited. Cooperation of national authorities is evidently needed. But much of the work in this phase depends on own research and public sources of information (national and international).

Some of the outputs of Phase II (bankable projects and project-specific PPP recommendations) depend on the results of the market and operational analysis in Phase I. It is obvious that investment needs should be present and identified before bankable projects can be selected. However, we think that the risk of finding no suitable projects is very small. The needs of the Black Sea Region in the area of port development are already known to be substantial.



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5.5 Update of Logframe

	Intervention logic	Objectively Verifiable Indicators	Sources of Verification	Assumptions
Overall objectives	<p>To facilitate trade along the corridor Europe- Black Sea Region- Caucasus- Central Asia by increasing its competitiveness and attractiveness as stated in the Basic Multilateral Agreement for International Transport for Development of the Europe-Caucasus-Asia corridor.</p> <p>Taking into consideration the strategic importance of the Black Sea in terms of regional transportation, the project should contribute to develop effective maritime links and improved hinterland connections. They should better comply with customer requests and best practices in corridor development and thus attract continuously more cargo and concentrate the freight traffic on multi-modal maritime-based logistical chains connecting the European TEN-Corridors with the TRACECA multi-modal transportation network.</p>	<ul style="list-style-type: none"> Relative increase of transport in TRACECA region, especially on Black Sea maritime link Level of trade along the corridor Europe- Black Sea Region- Caucasus- Central Asia Customer satisfaction (periodically) Corridor Competitiveness Due Diligence Project monitoring 	<ul style="list-style-type: none"> Transport statistics Trade statistics Questionnaires Independent audits Balance Scorecards 	<ul style="list-style-type: none"> Continued adherence to the principles laid down in the Basic Multilateral Agreement for International Transport for Development of the European Caucasus –Asia corridor.
Project purpose	<p>To create the basis for improved maritime links in the Black Sea region. This relates to reliable, safe, secure, competitive and efficient shipping and port services and to enable viable links with the Trans European Networks mainly with regard to rail ferry, Ro-Ro ferry and container services.</p>	<ul style="list-style-type: none"> Time schedules (frequency) and prices of transport services Number of accidents, incidents Service level due diligence (pricing, connectivity, reliability) Level of investments 	<ul style="list-style-type: none"> Websites of service providers or market prices as indicated in contracts National and mode specific statistics Port statistics User questionnaires, etc Sector service level reviews 	<ul style="list-style-type: none"> Continued co-operation between (indicated) TRACECA counties and international bodies, e.g. EU Continued expansion of international trade links Political stability in the TRACECA region and the region at large Continued efforts for co-operation within the TRACECA region, aimed towards promoting the increased competitiveness of the TRACECA corridors The involved TRACECA countries and the institutions involved will give full support to the project and are strongly committed to project objectives.



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	Intervention logic	Objectively Verifiable Indicators	Sources of Verification	Assumptions
Results	<p>The following four results are defined:</p> <ol style="list-style-type: none"> 1. An in-depth market research of the actual maritime transport situation in the Black Sea 2. A Feasibility study on the provision of a better Railway – Sea combined transportation with specific regard to Samsun 3. A country-wise ISPS Implementation concept 4. A pilot scheme for efficient port communication 5. An analysis of the applicability of Public Private Partnerships as a mean to increase project feasibility and facilitate project realisation 	<ul style="list-style-type: none"> • Provision of market research report • Provision of a detailed feasibility study • Level of ISPS compliance for ports and shipping • Provision of port communication report and implementation strategy • Provision of PPP institutional analysis report and insight in bankability of various projects in the region within a PPP framework 	<ul style="list-style-type: none"> • Final report • Final report • Compliance reviews • Final report 	<ul style="list-style-type: none"> • The pilot scheme for improved communication and information system can draw on experiences with information systems in Poti and Illiyehevsk port established in the framework of the TRACECA programme • Common (approach towards) legal and organisational bases of the Beneficiaries' maritime administrations. • Rules and regulations are not subject to variations and interpretation • Appropriate classification of ships under operation
Activities	<p><i>Result 1: An in-depth market research of the actual maritime transport situation in the Black Sea</i></p> <ol style="list-style-type: none"> 1.1. Collect and analyse data 1.2. Develop scenarios 1.3. Carry out sensitivity analysis 1.4. Development of an action plan <p><i>Result 2: A Feasibility study on the provision of a better Railway – Sea combined transportation with specific regard to Samsun</i></p> <ol style="list-style-type: none"> 2.1. Review of project alternatives 2.2. Technical feasibility assessment 2.3. Environmental impact assessment 2.4. Financial and economic feasibility assessment 	<p><u>Inputs:</u></p> <p>Key experts:</p> <ul style="list-style-type: none"> • Team leader: 24 man-months • Other key experts: 34 man-months <p>Short-term experts:</p> <ul style="list-style-type: none"> • Senior international experts: 25 man-months • Senior local experts: 25 man-months 	<p><u>Costs</u></p> <p>Fee budget on key experts and short-term experts</p> <p>Incidental expenditures on:</p> <ul style="list-style-type: none"> • Local and regional transport costs; • Travel costs for missions to be undertaken as part of this contract from the regional office in Sofia to other partner institutions in the region and between 	<ul style="list-style-type: none"> • Relevant data and supporting documents are made available to the project team • Assistance in providing insight in tariff structure • Assistance in providing insight in the adequacy of hinterland connections • Full support and commitment from project partners • Relevant data and supporting documents are made available to the project team • Assistance in providing insight in cost structures for rehabilitation and construction works • Willingness to use outputs of feasibility studies as input for decision making on optimal level of investment



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Improvement of Maritime Links between TRACECA and TENs Corridors Bulgaria, Georgia, Romania, Turkey and Ukraine



	Intervention logic	Objectively Verifiable Indicators	Sources of Verification	Assumptions
	<p><i>Result 3: A country-wise ISPS Implementation concept</i></p> <p>3.1. Review of ISPS implementation</p> <p>3.2. Elaboration of relevant guidelines</p> <p>3.3. Identification of bottlenecks</p> <p>3.4. Propose implementation concept</p> <p>3.5. Organise workshops</p> <p>3.6. Identification and formulation of projects</p> <p><i>Result 4: A pilot scheme for efficient port communication</i></p> <p>4.1. Review of findings from previous studies</p> <p>4.2. Define and implement pilot project</p> <p>4.3. Disseminate findings to other ports</p> <p><i>Result 5: PPP and Bankable Projects</i></p> <p>5.1. Determination and analysis of state-of-the-art PPP structure and activities per country</p> <p>5.2. Identification of bankable projects</p> <p>5.3. Assessment of applicability of PPP</p> <p>5.4. Recommendations per country</p>	<p>See: project planning overview</p>	<p>the regional offices;</p> <ul style="list-style-type: none"> Subsistence allowances for expert missions in the region; Office rent and running costs incl. Office communication; Translation of training materials and other relevant documents, Seminars and Workshops to be conducted. <p>See: financial proposal</p>	<ul style="list-style-type: none"> Access to information regarding security Access to port sites and ability and support to interview stakeholders Willingness to share findings from the pilot project Willingness to share experiences from Illiychevsk and Poti Cooperation from EC task manager on defining pilot project The ability to define united communication systems and the willingness to accept these



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TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



6.2 Work Plan for the next reporting period

6.2.1 Market Research and Action Plan

The activities for the next reporting period will focus on:

- visiting the Bulgarian, Romanian and Turkish ports (end of October) to discuss current situation and capacities, investment plans and future capacities, hinterland connections and other issues related to port performance;
- interviews with shipping lines active in the region;
- transport modelling and forecasting

The Port Operations and Maritime Transport expert will visit Turkey in the second half of October. Subsequently and after receipt of the statistical throughput data for all ports an analysis will be prepared of the same which will be included in the Working Paper 'Market Analysis'.

6.2.2 Feasibility Study Rail Ferry Terminal Samsun

The Port Operations and Maritime Transport expert will visit the Port of Samsun in the second half of October. Subsequently a diagnosis of the present conditions of the rail ferry terminal in Samsun port will be prepared and included in the Working Paper 'Feasibility Study Rail Ferry Terminal Samsun'.

The present situation regarding rail ferry operations on the Black Sea and the Rail Ferry Terminal at Samsun will be finalized and the future potential assessed.

6.2.3 Safety and Security

The Safety and Security expert is to visit Turkey (Ankara and the ports of Istanbul, Derince, Samsun and Hopa) and Georgia (Tbilisi and the ports of Poti and Batumi) in the period 29 October – 9 November 2007.

The Ukraine (Kiev and the ports of Odessa and Illiychevsk) will be visited in the first two weeks of February 2008.

6.2.4 Port Community Systems

To be visited in the following reporting period: Turkey (Derince, Istanbul, and Samsun)

Revising comments on Progress report Nr1.

Depending the results of the EU-vision on PCS vs. other views,

- o preparing a list of available 'state of the art' (W) European port and PCS-systems
- o preparing a PCS ppt/access demo version of 'how information exchange could be done' in a standardised way via unique procedures

6.2.5 PPP and Bankable Projects

Until the end of phase I the following activities are planned:



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- completion of port PPP framework;
- completion of state-of-the-art assessments of five TRACECA countries involved (port infrastructure investment plans, legal and institutional framework relevant to PPP and port investments, PPP experience);
- completion of national legal assessments (by national legal experts);
- preparation of action plans for phase II

To accomplish these activities the following missions are planned:

- 10-21 December 2007: Ankara and Tbilisi (meetings with relevant central ministries and authorities)
- January 2008: attendance of regional workshop on market analysis in Varna (of direct relevance to identification of bankable projects)
- February 2008: Kiev and Bucharest (meetings with relevant central ministries and authorities)
- March 2008: Sofia (preparation of action plans for Phase II)

6.3 Requests for Budget Deviations and Project Extension

An extension to the project results was proposed and agreed with the EC and the new project result: PPP and Bankable Project, was worked out and started. This resulted in the following budget neutral addendum:

- Port Infrastructure Expert - Mr. A. Merrien: 6 instead of 12 man-months, and;
- Introduction of PPP Expert - Mr. J. Gauderis: 6 man-months.



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Annex A List of Visits and Meetings in the Reporting Period



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Bulgaria, Georgia, Romania, Turkey and Ukraine



Date	Location	Organisation	Persons	Team
16 April 2007	Brussels, Belgium	European Commission EuropeAid Co-operation Office	Ms. H. Habart <i>Project Manager</i> Mr. F. Terrac <i>Programme Officer</i>	Edwin Lock Paul van Eulem Anthony van der Hoest
8 May 2007	Kiev, Ukraine	Ministry of Transport / TRACECA National Secretary	Mr. Legenkiy <i>TRACECA National Secretary</i> Ms. Dyachenko (project contact person) <i>Assistant to the TRACECA National Secretary</i>	Edwin Lock Klaas Westerkamp Peter Verwaerde Wouter van Nus Katia Bassova <i>(local partner)</i> Larissa Dobrukha <i>(local partner)</i>
10 May 2007	Sofia, Bulgaria	Ministry of Transport / TRACECA National Secretary	Mr. G. Petarneichev <i>Deputy Minister of Transport and TRACECA National Secretary</i> Mrs. L. Trenkova <i>Head of Protocol Directorate, MoT and former TRACECA National Secretary</i> Mr. A. Tzenov <i>European Integration and International Relations Directorate, Executive Agency "Maritime Administration"</i> Mr. A. Pashov (project contact person) <i>chief expert in European Integration and International Relations Directorate, Executive Agency "Maritime Administration"</i> Mr. A. Hadjov <i>National Company "Port Infrastructure"</i> Mr. S. Zagorov <i>Port Administration Agency, Chief Expert Ports</i> Mr. D. Minev <i>National Transport Policy Directorate, MoT</i> Ms. Z. Miladinova (project contact person) <i>International Relations Directorate, MoT</i> Mr. N. Startiev <i>International Relations Directorate</i> Capt. T. Ivanov <i>Marketing, Port of Bourgas</i>	Edwin Lock Klaas Westerkamp Peter Verwaerde Wouter van Nus Kristiana Chakarova <i>(local partner)</i>



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Bulgaria, Georgia, Romania, Turkey and Ukraine



11 May 2007	Varna, Bulgaria	Port of Varna EAD	Mr. D. Papazov <i>Executive Director</i> Mr. A. Stankov <i>Operations Director</i> Mr. K. Donev <i>Head of Portconsult Department</i>	Edwin Lock Klaas Westerkamp Peter Verwaerde Wouter van Nus Kristina Chakarova <i>(local partner)</i>
11 May 2007	Varna, Bulgaria	Podelenie za Tovarni Prevozi (Rail-Ferry Complex)	Mr. V. Marinov <i>Ferry Complex Director</i>	Edwin Lock Klaas Westerkamp Peter Verwaerde Wouter van Nus Kristina Chakarova <i>(local partner)</i>
14 May 2007	Constanta, Romania	NC Maritime Ports Administration, Constanta	Mr. V. Petrescu <i>Director Ports Infrastructure Division</i> Mr. C. Matei <i>President of the Board of Administration, General Manager</i> Ms. Nistor <i>Head of Strategy and European Integration Department</i> Ms. Staetu <i>Head of Foreign Investments Office</i> Ms. Dogaru <i>Head of Development Department</i>	Edwin Lock Klaas Westerkamp Peter Verwaerde Wouter van Nus
15 May 2007	Bucharest, Romania	Ministry of Transport / TRACECA National Secretary	Ms. I. Popescu (project contact person) <i>Counselor & Traceca National Secretary, replacing Mr. Iordache</i> Ms. J. Toma <i>General Directorate for Naval Transport, Maritime Transport Expert, replacing Mr. Cucu</i>	Edwin Lock Klaas Westerkamp Peter Verwaerde Wouter van Nus Viktor Dumitrescu <i>(local partner)</i>
4 June 2007	Brussels, Belgium	European Commission Directorate General for Transport and Energy (DG-TREN)	Mr. J. De la Cueva Aleu <i>Second National Expert – Ports</i> Mr. F. Terrac <i>Programme Officer EuropeAid</i>	Edwin Lock Klaas Westerkamp Peter Verwaerde Wouter van Nus



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Improvement of Maritime Links between TRACECA and TENs Corridors Bulgaria, Georgia, Romania, Turkey and Ukraine



6/7 June 2007	Odessa, Ukraine	Conference: Black Sea Area Transport Network Formation. East-West Network Integration	Presentation introducing the project.	Edwin Lock Wouter van Nus
6 June 2007	Odessa, Ukraine	Port of Illiychevsk	Mr. G. Tokman <i>Director Development and Investment Department</i>	Edwin Lock Wouter van Nus
6 June 2007	Odessa, Ukraine	European Commission Directorate General Energy and Transport	Ms. C. Sikow-Magny	Edwin Lock Wouter van Nus
7 June 2007	Odessa, Ukraine	Black Sea International Shipowners Association (BINSa, BSEC)	Mr. A. Malashenko <i>Executive Director</i> Mr. S. Melaschenko <i>Secretary General</i>	Edwin Lock Wouter van Nus
7 June 2007	Odessa, Ukraine	Black & Azov Sea Ports Association (BASPA, BSEC)	Mr. G. Tokman <i>Executive Director of BASPA</i>	Edwin Lock Wouter van Nus
7 June 2007	Odessa, Ukraine	Union of Road Transport Associations in the BSEC Region (BSEC-URTA)	Mr. H. Özkan <i>Secretary General</i>	Edwin Lock Wouter van Nus
7 June 2007	Odessa, Ukraine	Black Sea Trade & Development Bank	Mr. O. Aytemiz <i>Director Manufacturing</i>	Edwin Lock Wouter van Nus
8 June 2007	Kiev, Ukraine	Delegation of the European Commission	Mr. V. Voráček <i>Project Manager</i>	Edwin Lock Wouter van Nus
11 June 2007	Tbilisi, Georgia	Delegation of the European Commission	Mr. A. Loeber	Edwin Lock Peter Verwaerde Wouter van Nus Gogi Gogiashvili (local partner)



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Improvement of Maritime Links between
TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



11 June 2007	Tbilisi, Georgia	Ministry of Economic Development	Mr. Vatsadze (project contact person) <i>Head of Transport Department & TRACECA National Secretary</i> Note: Georgia has no Ministry of Transport; the Transport Department is part of the Ministry of Economic Development	Edwin Lock Peter Verwaerde Wouter van Nus Gogi Gogiashvili (local partner)
12 June 2007	Poti, Georgia	Poti Sea Port	Mr. E. Machavariani <i>Commercial & Investments Director</i> Harbourmaster Poti Port	Edwin Lock Peter Verwaerde Wouter van Nus Gogi Gogiashvili (local partner)
12 June 2007	Batumi, Georgia	United Transport Administration, Maritime Transport Department	Mr. D. Baramidze <i>Head of Department</i>	Edwin Lock Peter Verwaerde Wouter van Nus Gogi Gogiashvili (local partner)
12 June 2007	Batumi Georgia	Batumi Sea Port Ltd.	Mr. N. Katamadze <i>Deputy Director General</i>	Edwin Lock Peter Verwaerde Wouter van Nus Gogi Gogiashvili (local partner)
13 June 2007	Ankara, Turkey	Delegation of the European Commission	Mr. G. Kara <i>Sector Manager Transport</i> Ms. C. Çoygun <i>Project Assistant</i>	Edwin Lock Peter Verwaerde Klaas Westerkamp Wouter van Nus



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Improvement of Maritime Links between
TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



14 June 2007	Ankara, Turkey	Ministry of Transport & Communications	<p>Mr. B. Tozar (project contact person) <i>TRACECA National Secretary represented by</i></p> <p>Ms. S. Özyanik (project contact person) <i>Assistant to the TRACECA National Secretary</i></p> <p>Ms. Işık <i>General Directorate of Land Transport, Head of Department</i></p> <p>Ms. L. Başkani <i>General Directorate of Railways, Harbors and Airports Construction (DLH), Head of Department</i></p> <p>Ms. I. Elvan <i>General Directorate of Railways, Harbors and Airports Construction (DLH), Urban Planner</i></p> <p>Mr. H. Karabiyik <i>Maritime Department Export Specialist</i></p> <p>Mr. H. Özcan <i>Head of Department TCDD (National Railways)</i></p> <p>Mr. A. Parlak <i>TCDD Engineer</i></p>	Edwin Lock Peter Verwaerde Klaas Westerkamp Wouter van Nus
15 June 2007	Samsun, Turkey	Samsun Port (TCDD)	Mr. E. Gemici <i>Deputy Port Manager</i>	Edwin Lock Peter Verwaerde Wouter van Nus
18 June 2007	Baku, Azerbaijan	TRACECA Permanent Secretary	Mr. N. Mamedov <i>Maritime Operations Expert, replacing</i>	Edwin Lock Wouter van Nus

31 July 2007 Sofia, Bulgaria	Institute of Transport and Communications	Ms. Kristiana Chakarova, Senior project manager	Edwin Lock
7 Aug 2007 Sofia, Bulgaria	Intermodal, Shortsea and Inland Waterway Promotion Association	Mr. Georgi Petkov, Director	Edwin Lock, Kristiana Chakarova



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Improvement of Maritime Links between
TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



7 August 2007 Varna, Bulgaria	Ministry of Transport / E.A. Maritime Administration Varna	<ul style="list-style-type: none"> - Mr. Bogdan Bogdanov <i>Director Harbour Master</i> - Mr. Zlatko Kuzmanov <i>Director Information Services to Shipping, Search and Rescue</i> - Mr. Boris Kovachev <i>Head of Department PSC & FSI</i> 	<ul style="list-style-type: none"> - Peter Verwaerde - Wim Welvaarts - Mr. A. Pashov, Chief expert EA MAA Sofia European Integration & International Relations Directorate Project Contact person
7 August 2007 Varna, Bulgaria	Port of Varna EAD (Port operator)	<ul style="list-style-type: none"> - Mr. Alexander Stankov <i>Operations Director</i> - Mr. Petar Geveziev <i>Chief of IT Department</i> - Tolk 	<ul style="list-style-type: none"> - Peter Verwaerde - Wim Welvaarts - Mr. A. Pashov, Chief expert EA MAA Sofia European Integration & International Relations Directorate Project Contact person
7 August 2007 Varna, Bulgaria	Ministry of Transport / E.A. Port Administration Varna Regional Division	<ul style="list-style-type: none"> - Mr. Ivaylo Radoslavov <i>Chief Inspector</i> - Mr. Chaney ICT-manager 	<ul style="list-style-type: none"> - Peter Verwaerde - Wim Welvaarts - Mr. A. Pashov, Chief expert EA MAA Sofia European Integration & International Relations Directorate Project Contact person
7 August 2007 Varna, Bulgaria	Ministry of Transport / E.A. Port Administration Varna Regional Division Bulgarian Ports Infrastructure Co	<ul style="list-style-type: none"> - Mr. Chaney ICT-manager - Dispatcher 	<ul style="list-style-type: none"> - Peter Verwaerde - Mr. A. Pashov, Chief expert EA MAA Sofia European Integration & International Relations Directorate Project Contact person



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Improvement of Maritime Links between
TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



7 August 2007 Varna, Bulgaria	Bulgarian Ports Infrastructure Co. Varna	- Mr. Veselin Kalpakchiev <i>Director</i>	- Peter Verwaerde - Wim Welvaarts - Mr. A. Pashov, Chief expert EA MAA Sofia European Integration & International Relations Directorate Project Contact person
8 August 2007 Varna, Bulgaria	Port of Varna EAD (Port operator)	- Mr. Petar Geveziev <i>Chief of IT Department</i> - Tolk	- Peter Verwaerde - Mr. A. Pashov, Chief expert EA MAA Sofia European Integration & International Relations Directorate Project Contact person
8 August 2007 Varna, Bulgaria	Ministry of Transport / E.A. Maritime Administration Varna	- Mr. Boris Kovachev <i>Head of Department PSC & FSI</i>	- Peter Verwaerde - Mr. A. Pashov, Chief expert EA MAA Sofia European Integration & International Relations Directorate Project Contact person
8 August 2007 Varna, Bulgaria	Port of Varna EAD (Port operator)	- Mr. Hristov <i>Operations Director Varna West</i> - Tolk	- Wim Welvaarts
8 August 2007 Varna, Bulgaria	BDZ EAD (Rail operator)	- Mr. Marinov <i>Director Rail Ferry Varna</i> - Mr. Lalov - Tolk	- Wim Welvaarts
8 August 2007 Varna, Bulgaria	Ministry of Transport / E.A. Maritime Administration Varna	- Mr. Bonev <i>VTMIS/MRCC/SAR</i> - Mr. Gospadinov <i>VTMIS/MRCC/SAR</i>	- Peter Verwaerde - Mr. A. Pashov, Chief expert EA MAA Sofia European Integration & International Relations Directorate Project Contact person



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Improvement of Maritime Links between
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Bulgaria, Georgia, Romania, Turkey and Ukraine



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9 August 2007 Constantza, Romania	National Company Maritime Ports Administration ² Constantza S.A.	- Ms. Emilia Horovej <i>Head of Protocol & Public Relations</i> - Ms. Cristiana Răcăutanu <i>Head of International Affairs</i>	- Peter Verwaerde - Wim Welvaarts - Ioan Cuncev (IPTANA)
9 August 2007 Constantza, Romania	National Company Maritime Ports Administration Constantza S.A.	- Mr. Constantin Matei <i>Head of the Board of Administration General Manager</i> - Ms. Cristiana Răcăutanu <i>Head of International Affairs</i>	- Peter Verwaerde - Wim Welvaarts - Ioan Cuncev (IPTANA)
9 August 2007 Constantza, Romania	National Company Maritime Ports Administration Constantza S.A.	- Mr. Ambroziu Duma <i>Director – Port Operations, Safety & Security Division</i>	- Peter Verwaerde - Wim Welvaarts - Ioan Cuncev (IPTANA)
9 August 2007 Constantza, Romania	National Company Maritime Ports Administration Constantza S.A.	- Mrs. Elisa Hurduc ICT-manager	- Peter Verwaerde
9 August 2007 Constantza, Romania	CFRI	- <i>Director Ferry Company</i> - Mr. Daniel Jarnea <i>Marketing dept.</i>	- Peter Verwaerde - Wim Welvaarts - Ioan Cuncev (IPTANA)
10 August 2007 Constantza, Romania	National Company Maritime Ports Administration Constantza S.A.	- Mr. Ambroziu Duma <i>Director – Port Operations, Safety & Security Division</i> - Mr. D. Mihai <i>Port Operations</i>	- Peter Verwaerde - Wim Welvaarts - Ioan Cuncev (IPTANA)
10 August Constantza- Romania	Romanian Naval Authority	- Mr. Dumitru Bucuresteanu Sef Servicia SAR-Poluare - Mr. Emil Gusa Sef Servicia Dirijare Trafic - Mr Alexander Mezei Constantza Harbour Master - Mr. Julian Ichim ICT-manager	- Peter Verwaerde - Wim Welvaarts - Ioan Cuncev (IPTANA)
10 August Constantza- Romania	Romanian Naval Authority	- Mr. Emil Gusa Sef Servicia Dirijare Trafic - Mr. Julian Ichim ICT-manager	- Peter Verwaerde - Wim Welvaarts - Ioan Cuncev (IPTANA)

² 'National Company Maritime Ports **Administration** Constantza SA', (sometimes) also called MPAC SA (Maritime Ports

Administration Constantza SA'), to become:

- 'National Company Maritime Ports **Authority** Constantza SA'
- !! situation 10/08/2007: nobody able to find draft proposal of new law (or changes?)
- ? RNA do not agree with name change: 'private (SA/Ltd) Port Authority'



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Improvement of Maritime Links between
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Bulgaria, Georgia, Romania, Turkey and Ukraine



13 August Burgas Bulgaria	POB Port of Burgas EAD (Operator)	<ul style="list-style-type: none"> - Mr. Tanyo Ivanov Chief FR, Marketing & QA Dpt. - Mr. Ivan Todorov ICT-manager - Mr. Pavel Sotirov Chief of Coordination Dept. Dep. director Exploitation dept. - Mr. Dimitar Georgiev Director Constructions - Mr. Jivko Petrov Director-Harbourmaster Maritime Administration - Mr. Todor Shivachev Director MoT E.A. Port Administration - Mr. Dimitar Terziev Manager Bulk Cargo Terminal - Mr. Valentin Kozarov Terminal West - Mr. Grozdan Krastev Terminal East - Ms. Tiha Taushanova Port Infrastructure/Sofia (ICT) - Mr. Stanimir Georgiev Port Infrastructure 	<ul style="list-style-type: none"> - Peter Verwaerde - Wim Welvaarts
13 August Burgas Bulgaria	POB Port of Burgas EAD (Operator)	<ul style="list-style-type: none"> - Mr. Ivan Todorov ICT-manager - Mrs. Darina Stefanova Funct. analyst/pgm 	<ul style="list-style-type: none"> - Peter Verwaerde
13 August Burgas Bulgaria	POB Port of Burgas EAD (Operator)	<ul style="list-style-type: none"> - Mr. Tanyo Ivanov Chief FR, Marketing & QA Dpt. - Ms. Tiha Taushanova Port Infrastructure/Sofia (ICT) 	<ul style="list-style-type: none"> - Wim Welvaarts
13 August Burgas Bulgaria	Port Infrastructure	<ul style="list-style-type: none"> - Mr. Stanimir Georgiev Port Infrastructure - Ms. Tiha Taushanova Port Infrastructure/Sofia (ICT) 	<ul style="list-style-type: none"> - Peter Verwaerde - Wim Welvaarts
13 August Burgas Bulgaria	Ministry of Transport / E.A. Maritime Administration Burgas	<ul style="list-style-type: none"> - Mr. Jivko Petrov Director - Harbourmaster 	<ul style="list-style-type: none"> - Peter Verwaerde - Wim Welvaarts
13 August Burgas Bulgaria	POB Port of Burgas EAD (Operator)	<ul style="list-style-type: none"> - Mr. Ivan Todorov ICT-manager - Mrs. Darina Stefanova Funct. analyst/pgm 	<ul style="list-style-type: none"> - Peter Verwaerde - Wim Welvaarts



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Improvement of Maritime Links between
TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



14 August Burgas Bulgaria	Ministry of Transport / E.A. Maritime Administration Burgas	- Mr. Jivko Petrov Director - Harbourmaster Maritime Administration - Mr. H. Toolorov Atanasov VTS	- Peter Verwaerde - Wim Welvaarts
14 August Burgas Bulgaria	POB Port of Burgas EAD (Operator)	- Mr. Tanyo Ivanov Chief FR, Marketing & QA Dpt.	- Peter Verwaerde - Wim Welvaarts
14 August Burgas Bulgaria	POB Port of Burgas EAD (Operator)	- Mr. Tanyo Ivanov Chief FR, Marketing & QA Dpt. - Mr. Dimitar Terziev Manager Bulk Cargo Terminal	- Peter Verwaerde - Wim Welvaarts
14 August Burgas Bulgaria	POB Port of Burgas EAD (Operator)	- Mr. Tanyo Ivanov Chief FR, Marketing & QA Dpt.	- Peter Verwaerde - Wim Welvaarts
14 August Burgas Bulgaria	POB Port of Burgas EAD (Operator)	- Mr. Ivan Todorov ICT-manager - Mrs. Darina Stefanova Funct. analyst/pgm	- Peter Verwaerde
14 August Burgas Bulgaria	POB Port of Burgas EAD (Operator)	- Mr. Tanyo Ivanov Chief FR, Marketing & QA Dpt. - Mr. Pavel Sotirov Chief of Coordination Dept. Dep. director Exploitation dept.	- Wim Welvaarts
15-17 August Sofia Bulgaria	Local partner ICT	- Div	- Peter Verwaerde - Wim Welvaarts

Date & Location	Organization	Persons	Team
4 September 2007 Batumi, Georgia	Batumi Sea Trading Port Ltd.	- Mr. Phridon Surmanidze <i>Director General</i> - Ms. Nina Oragrelidze <i>Interpreter</i>	- Klaas Westerkamp - Wim Welvaarts
5 September 2007 Poti, Georgia	Poti Sea Port Ltd.	- Mr. Eduard Machavariani <i>Commercial & Investment Director</i>	- Klaas Westerkamp - Wim Welvaarts
5 September 2007 Poti, Georgia	Poti Sea Port Ltd.	- Mr. Zviad Chkhartishvili <i>Marketing Manager</i>	- Klaas Westerkamp - Wim Welvaarts



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Improvement of Maritime Links between
TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



6 September 2007 Batumi, Georgia	Batumi Sea Port Ltd.	- Mr. Dursun Sirabidze <i>Exploitation Manager</i> - Mr. Ioseb Diagami <i>Assistant Exploitation Manager</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
6 September 2007 Batumi, Georgia	Batumi Sea Port Ltd.	- Mr. Michail Barishnikov <i>Deputy ICT Manager</i> - Mr. Ioseb Diagami <i>Assistant Exploitation Manager</i>	- Peter Verwaerde
6 September 2007 Batumi, Georgia	Batumi Sea Port Ltd.	- Mr. Dursun Sirabidze <i>Exploitation Manager</i> - Ms. Chigogidze Irina <i>Interpreter</i>	- Klaas Westerkamp - Wim Welvaarts
6 September 2007 Batumi, Georgia	TERO Shipping and Forwarding Agency	- Dr. Zurab Surmanidze <i>General Manager</i> - Mr. Ioseb Diagami <i>Assistant Exploitation Manager</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
6 September 2007 Batumi, Georgia	Georgian Customs	- Mr. Levan Pailodze <i>General Manager</i> - Mr. Ioseb Diagami <i>Assistant Exploitation Manager</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
7 September 2007 Poti, Georgia	Barwil Unitor Ship Service Ltd.	- Mr. Neil O'Reilly <i>General Manager</i>	- Peter Verwaerde - Wim Welvaarts
7 September 2007 Poti, Georgia	Georgian Customs	- Mr. Zurab Kikalia <i>Head of Port Customs Department</i> - <i>Interpreter</i>	- Peter Verwaerde - Wim Welvaarts
7 September 2007 Poti, Georgia	Poti Harbour Master Georgian Maritime Transport Administration	- Mr. Vakhtang Tavberidze <i>Harbour Master</i> - <i>Interpreter</i>	- Peter Verwaerde - Wim Welvaarts
7 September 2007 Poti, Georgia	Poti Sea Port Ltd. - Port Railways	- <i>Chief Engineer</i> - <i>Interpreter</i>	- Peter Verwaerde - Wim Welvaarts
7 September 2007 Poti, Georgia	Poti Sea Port Ltd. - Rail Ferry Terminal	- Mr. Simon Abakelia <i>Head of Rail Ferry Terminal</i> - <i>Interpreter</i>	- Peter Verwaerde - Wim Welvaarts
7 September 2007 Poti, Georgia	Poti Sea Port Ltd.	- Mr. Pavel M. Zabolotsky <i>Manager of Communication and IT Department</i> - Mr. Zviad Chkhartishvili <i>Marketing Manager</i>	- Peter Verwaerde - Wim Welvaarts



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Improvement of Maritime Links between
TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



7 September 2007 Poti, Georgia	Poti Sea Port Ltd.	- Mr. Zviad Chkhartishvili <i>Marketing Manager</i>	- Peter Verwaerde - Wim Welvaarts
10 September 2007 Batumi, Georgia	Batumi Sea Trading Port Ltd.	- Mr. Katamadze <i>Deputy Director General</i>	- Peter Verwaerde - Wim Welvaarts
10 September 2007 Batumi, Georgia	Georgian Maritime Transport Administration – Maritime Transport Department	- Mr. Valerian Imnaishvili <i>Heads of Ships Registry and Flag State Implementation Division</i>	- Peter Verwaerde - Wim Welvaarts
10 September 2007 Batumi, Georgia	Batumi Sea Trading Port Ltd.	- Mr. Ioseb Diagami <i>Assistant Exploitation Manager</i> - Ms. Chigogidze Irina	- Meeting cancelled
10 September 2007 Batumi, Georgia	Abi-Trans Agency	- Ms. Natalia Mgaloblishvili	- Meeting cancelled
12-13 September Sofia Bulgaria	Local partner ICT	- Div	- Edwin Lock - Peter Verwaerde - Wim Welvaarts

17 September Sofia Bulgaria	MINISTRY of TRANSPORT	Mr ANTON PASHOV Chief Expert of Maritime Administration Mr Roumen PEEV head of port registers and control directorate Ms IANAKIEVA National Transport Policy - Mr BENOVA from National Transport Policy	Mr Edwin LOCK head of project Capt APPERRY Safety and Security Expert Ms Magdelina GEROVA secretary Ms Kristiana CHAKAROVA ITC
18 September Sofia Bulgaria	Maritime Administration	Anton PASHOV & Chavdar KRASYEV	Capt APPERRY Safety and Security Expert
18 September Sofia Bulgaria	MINISTRY of TRANSPORT	Capt Peycho MANOLOV Executive Director Port Adm Roumen PEEV head of Port registers and control directorate) Teodor KALINOV Port Security Expert	Capt APPERRY Safety and Security Expert
20 September Burgas Bulgaria	Maritime Administration	Mr Konstantin GRUDOV Senior Inspector	Capt APPERRY Safety and Security Expert



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TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



20 September Burgas Bulgaria	Port of BOURGAS Administration	Jivko JELEV Chief crisis management depart. & Port Security Officer Capt Tanyo IVANOV chief Marketing & QA dept	Capt APPERRY Safety and Security Expert
21 September Burgas Bulgaria	Port of BOURGAS Administration	Mr Jivko JELEV Chief crisis management depart. & Port Security Officer Capt Tanyo IVANOV chief Marketing & QA dept George TEMELIEV head of Port safety dept	Capt APPERRY Safety and Security Expert
24 September Varna Bulgaria	Maritime Administration	Mr Peyo PETLEV Senior inspector (PSC & FSI)	Capt APPERRY Safety and Security Expert
24 September Varna Bulgaria	Administration of VARNA PORT	Mr Dragomir PETROV Port facility Officer of VARNA East and West and Oil terminal Mr Krasimir DOXIMOV Port Manager VARNA EAST	Capt APPERRY Safety and Security Expert
24 September Varna Bulgaria	Administration of VARNA PORT	Ivaylo RADOSLAVOV Port Administration Goergi Petrov TSONEV Port Authority Marin CHANEV Port Authority	Capt APPERRY Safety and Security Expert
24 September Varna Bulgaria	RAILWAY FERRY Head office	Mr Orlin RANGELOV Director Mr Ivan LALEV Port operation manager	Capt APPERRY Safety and Security Expert
25 September Constantza Romania	RNA (Romanian Naval Authority)	Mr Paul BRANZA Director of Inspections and safety directorate Mr Constantin RAICU Head of ISM/ISPS department Capt Anton VOITINOVICI Safety and Security depart. CONSTANTZA port Georghe STROE Chief of PSC & PSC department	Capt APPERRY Safety and Security Expert
26 September Constantza Romania	CONSTANTZA Port Authority	Capt Anton VOITINOVICI Safety and Security department CONSTANTZA port Mrs Angela IENESEL Department of Port safety	Capt APPERRY Safety and Security Expert
27 September Bucharest Romania	PORT administration in Ministry of Transport	Mr Christian CAZACU Directia Generala Transport Naval	Capt APPERRY Safety and Security Expert ITC
3 October Sofia Bulgaria	Ministry of Transport, Legal directorate	Mrs. Krasimira Stoyanova (director)	Johan Gauderis Wouter van Nus Magdelina Gerova
3 October Sofia Bulgaria	Ministry of Transport, Concessions directorate	Mr. Georgi Todorov (director)	Johan Gauderis Wouter van Nus Magdelina Gerova
4 October Sofia Bulgaria	Ministry of Transport, Executive Agency "Port Administration"	Capt. Peycho Manolov (Executive Director) Mrs. Magdalena Mateeva (Head of Administrative, Legal and Finance Directorate) Mr. Stefan Zagorov	Johan Gauderis Wouter van Nus Magdelina Gerova



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Improvement of Maritime Links between
TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



5 October Sofia Bulgaria	Bulgarian Ports Infrastructure Co.	Mr. Angel Zaburtov (deputy general director) Mr. Aleksandr Hadjov (international relations)	Johan Gauderis Wouter van Nus Magdelina Gerova
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Date & Location	Organization	Persons	Team
1 October 2007 Odessa , Ukraine	Steder Group, Intrapac GmbH, Nortrop	- Mr. Jangé van Kralingen <i>General Manager Steder Group</i> - Mr. Jerry Heemskerk <i>Cargo Superintendent Intrapac GmbH</i> - Mr. Andrey Varvarenko <i>Nortrop</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
2 October 2007 Odessa , Ukraine	Nortrop, Odessa Ltd.	- Mr. Andrey Varvarenko <i>General Manager</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
2 October 2007 Odessa , Ukraine	Plaske – Freight Forwarding Dept.	- Mr. Ivan Kokorzhitskiy <i>Managing Director</i> - Mr. Dmytro <i>Logistics Manager</i> - Mr. Artem Khachaturyan <i>Deputy Director General</i> - Ms. Olga Shestopalova <i>Interpreter</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
3 October 2007 Odessa , Ukraine	Odessa Commercial Sea Port	- Mr. Mikhail Shaposhnikov <i>Head of Marketing Department</i> - Ms. Nelly Tkachuk <i>Engineer of Marketing Department</i> - Ms. Olga Shestopalova <i>Interpreter</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
3 October 2007 Odessa , Ukraine	Odessa Commercial Sea Port	- Mr. Mikhail Shaposhnikov <i>Head of Marketing Department</i> - <i>ICT Manager</i> - Ms. Olga Shestopalova <i>Interpreter</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
3 October 2007 Odessa , Ukraine	Odessa Commercial Sea Port	- Mr. Alex Antonov <i>Harbour Master</i> - Mr. Mikhail Shaposhnikov <i>Head of Marketing Department</i> - Ms. Olga Shestopalova <i>Interpreter</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
3 October 2007 Odessa , Ukraine	Odessa Port Control	- <i>Various VTMS captains/ operators</i> - Mr. Novichenko <i>ICT Manager</i> - Ms. Olga Shestopalova <i>Interpreter</i>	- Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts



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Improvement of Maritime Links between
TRACECA and TENs Corridors
Bulgaria, Georgia, Romania, Turkey and Ukraine



4 October 2007 Odessa, Ukraine	Binsa, Black Sea International Shipowners Association	<ul style="list-style-type: none"> - Mr. Alexander Malashenko <i>Executive Director</i> - Ms. Olga Shestopalova <i>Interpreter</i> 	<ul style="list-style-type: none"> - Klaas Westerkamp - Peter Verwaerde
5 October 2007 Illiyechevsk, Ukraine	Sea Commercial Port of Illiyechevsk	<ul style="list-style-type: none"> - Mr. Oleg G. Fotchenko <i>Deputy Director General</i> - Mr. Georgiy I. Tokman <i>Director Development and Investment Department</i> - Mr. Alexander Pliska <i>Head of IT Department</i> - Ms. Iryna Babeshko <i>Engineer Development and Investment Department</i> - Ms. Helen Blagodir <i>Specialist Public Relations Department</i> - Ms. Victoria T. Marchenko <i>Director of Marketing and Logistics Department</i> - Mr. Soroka Stanislav <i>Harbour Master</i> - Ms. Olga Shestopalova <i>Interpreter</i> 	<ul style="list-style-type: none"> - Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
5 October 2007 Illiyechevsk, Ukraine	Sea Commercial Port of Illiyechevsk	<ul style="list-style-type: none"> - Mr. Georgiy I. Tokman <i>Director Development and Investment Department</i> - Ms. Iryna Babeshko <i>Engineer Development and Investment Department</i> - Ms. Olga Shestopalova <i>Interpreter</i> 	<ul style="list-style-type: none"> - Klaas Westerkamp - Peter Verwaerde - Wim Welvaarts
5 October 2007 Illiyechevsk, Ukraine	Sea Commercial Port of Illiyechevsk	<ul style="list-style-type: none"> - Mr. Alexander Pliska <i>Head of IT Department</i> - Ms. Iryna Babeshko <i>Engineer Development and Investment Department</i> - Ms. Helen Blagodir <i>Specialist Public Relations Department</i> - Ms. Victoria T. Marchenko <i>Director of Marketing and Logistics Department</i> - Mr. Soroka Stanislav <i>Harbour Master</i> 	<ul style="list-style-type: none"> - Peter Verwaerde
			-



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5 October 2007 Illiychevsk, Ukraine	Sea Commercial Port of Illiychevsk	<ul style="list-style-type: none"> - Ms. Victoria T. Marchenko <i>Director of Marketing and Logistics Department</i> - Ms. Iryna Babeshko <i>Engineer Development and Investment Department</i> - Ms. Olga Shestopalova <i>Interpreter</i> 	<ul style="list-style-type: none"> - Peter Verwaerde - Wim Welvaarts
9-12 September Sofia Bulgaria	Local partner ICT	<ul style="list-style-type: none"> - Div 	<ul style="list-style-type: none"> - Edwin Lock - Wouter van Nus - Peter Verwaerde - Wim Welvaarts



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Annex B Questionnaire ICT / PCS



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Questionnaire Basic guideline for (mainly) ICT-matters

ID	
Country	Bulgaria/Georgia/Romania/Ukraine/Turkey
Port/City	
Date	
Time	
Authority/Company	
Person(s)	
Team member(s)	
Remarks	

1. who are the (maritime) port community actors in the **Port**?
 - a. Public authorities
 - i.
 - ii.
 - iii.
 - iv.
 - v.
 - b. Private enterprises
 - i.
 - ii.
 - iii.
 - iv.
 - v.
 - c. Mixed
 - i.
 - ii.
 - iii.
 - iv.
 - v.
2. who (or what organization/dept) is/are, in your opinion, the most important actors in the (maritime) traffic (ship movements & cargo) flow? end why?
 - a.
 - b.
 - c.
3. if no PCS yet: who (or what organization) should be the "design-build-operate-maintain (DBOM)" entity? and why?
 - a.



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4. websites: Y/N?

i. what is the actual (date:) situation of existing websites?

1. public authorities:

- a.
- b.
- c.
- d. ..
- e.
- f. what are the future plans?
- i.

2. private

- a.
- b.
- c.
- d.
- e.
- f. what are the future plans?
- i.

3. mixed

- a.
- b.
- c.
- d. ..
- e.
- f. what are the future plans?
- i.

5. what (maritime transport related) information do they exchange?:

i. between Authorities?

1. name all documents which are exchanged

- a.
- b.
- c.
- d.
- e.

2. show on a 'document/information flow diagram': what physical document to who?: for information only, for approval and back or - forward, etc....

- a. attach figure 1: information flow



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3. automated?

a. Y: what system/application is used?

i. Local file/record transfer?

ii. e-mail?

iii. EDI/Edifact or EDI/ANSI-X12 transmission?

1. Local msgs? Achronym + short description

- a.
- b.
- c.
- d. ...

2. Official UN-msgs? Achronym + short description

- a.
- b.
- c.
- d.

iv. via a single window PCS?

1. web-enabled? describe

- a.

2. full Portal capabilities? describe

- a.

3. off the shelf package?

a. name & short description:

- i.

4. tailor made?

a. name & short description

- i.



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ii. from private <-> the various Authorities?

1. name all documents which are exchanged

- a.
- b.
- c.
- d.
- e.

2. show on a 'document/information flow diagram': what physical document to who?: for information only, for approval and back or - forward, etc....

- a. attach figure 1: information flow

3. automated?

- a. Y: what system/application is used?
 - i. Local file/record transfer?

- ii. e-mail?

iii. EDI/Edifact or EDI/ANSI-X12 transmission?

1. Local msgs? Achronym + short description

- a.
- b.
- c.
- d. ...

2. Official UN-msgs? Achronym + short description

- a.
- b.
- c.
- d.

iv. via a single window PCS?

1. web-enabled? describe

- a.

2. full Portal capabilities? describe

- a.

3. off the shelf package?

- a. name & short description:

- i.

4. tailor made?

- a. name & short description

- i.



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iii. private enterprises between each other?

1. name all documents which are exchanged

- a.
- b.
- c.
- d.
- e.

2. show on a 'document/information flow diagram': what physical document to who?: for information only, for approval and back or - forward, etc....

- a. attach figure 1: information flow

3. automated?

- a. Y: what system/application is used?
 - i. Local file/record transfer?

- ii. e-mail?

iii. EDI/Edifact or EDI/ANSI-X12 transmission?

1. Local msgs? Achronym + short description

- a.
- b.
- c.
- d. ...

2. Official UN-msgs? Achronym + short description

- a.
- b.
- c.
- d.

iv. via a single window PCS?

1. web-enabled? describe

- a.

2. full Portal capabilities? describe

- a.

3. off the shelf package?

- a. name & short description:

- i.

4. tailor made?

- a. name & short description

- i.



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6. In the example hereafter, please indicate which and where to (who) the indicated information is sent?

Ship's departure last port	(Pre) Arrival	In Port	(Pre) Departure	Next port of call
i.	ii.	iii.	iv.	v.

i. ship's departure in previous port:

1. ship's movement info
2. cargo info
 - a. dangerous cargo info (HG)
3. waste info
4. other

ii. ship's arrival in your port

1. ship's movement info(pre)announcement
 - a. berth request
 - i. arrival
 - b. request for services
 - i. pilot
 - ii. tugs
 - iii. mooring gangs
 - iv. energy
 - v.
2. crew/passenger lists
3. waste
4. cargo info
 - a. dang. goods (cross checking?)
5.

iii. Ship's stay in your port

1. cargo info: loading/unloading
 - a. dang. goods follow-up

2. ship's movement info

- a. berth shift request
- b. request for services
 - i. pilot
 - ii. tugs
 - iii. mooring gangs
 - iv.

iv. Ship's (pre) departure

1. ship's movement info:
 - a. departure request
 - b. request for services
 - i. pilot
 - ii. tugs
 - iii. mooring gangs
 - iv.

2. invoicing

- a. harbour dues



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- i. mooring dues
 - ii. tonnage dues
 - iii. light dues
 - iv.
 - v.
 - b. pilotage
 - c. tugs
 - d. un/mooring gangs
 - e.
- v. Next port of call (cfr. i.)
 - 1. ship's movement info
 - 2. cargo info
 - a. dang. goods
 - 3. waste info



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Annex C Questionnaire Tariff Study



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PORT TARIFF SURVEY QUESTIONNAIRE

1. Please provide the "Port Tariffs" currently applied.

A digital copy of the current port tariffs can be attached to the response (preferably in English)

2. Please fill out the attached table to provide insight in the recent tariff changes (1995 – 2009)

Please enter the units of measurement (column C) for the specified port charges. In the subsequent columns tariff changes (if applicable) can be filled in as a percentage or as an absolute value. A description of the various port charges can be found as an annex to this document.

If a port charge currently charged at the port is not included in the list provided in the table, please provide information of the port charge by filling out the type, the unit of measurement and the subsequent tariff changes.

3. Please fill out the attached table for three hypothetical vessels in the applicable currency of measurement in 2007. With this exercise we would like to gain insight in the actual port tariffs charged and the structure of these tariffs (charging party vs paying party)

If a port charge currently charged at the port is not included in the list provided in the table, please provide information of the port charge by filling out the type, charging party, paying party, rates and basis in 2007. A description of the various port charges can be found as an annex to this document.

A description of the various port charges can be found as an annex to this document.



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Annex: Description of Port Charges

- Conservancy: Utilization of general nautical facilities in the approaches to the port (i.e., outside the port area)
- Port dues: Utilization of general nautical facilities within the port including channels, vessel traffic service, emergency fire services, breakwaters, pollution control, marine security
- Pilotage: Provision of pilot includes all matters ancillary to the provision of the pilot, including labour, craft, shoreside facilities etc.
- Tug service: Provision of tugs
- Mooring/Unmooring: Securing a vessel and subsequent release
- (i) Berth hire (=time of ship alongside size of ship) (ii) Wharfage (=volume/weight/size of cargo)

Items (i) and (ii) cover the use of the berth and all associated fixtures, facilities and services including berth/anchorage, fendering, channel depth, workers facilities, rail facilities, roads, fencing, lighting, stacking area, pollution control

- Ancillary service: Provision of various services at berth, for example, cleaning, water, electricity, telephone, garbage, security
- Stevedorage: Handling of cargo from ship to wharf or from wharf to ship
- Wharf handling: Handling of cargo from wharf to road/rail or vice versa either directly or through a transit shed
- Extra movement: Handling, restacking, and sorting
- Special cargo handling: Handling of cargo requiring special attention by reefers, over-height etc.
- Storage: Storage of cargo beyond basic time period
- Packing/Unpacking: Packing or unpacking of containers or unit loads
- Equipment/Service/Facility hire: Use of equipment, facilities and services for various cargo operations described above not provided as standard. It also includes use of transit sheds, stacking areas and other facilities when they are not uniquely associated with an individual berth



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Annex D Report Distribution List



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TACIS Monitoring Team



Published November 2007

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