Interreg

EUROPEAN UNION

Danube Transnational Programme

DAPhNE

PORT ADMISTRATION PROCESSES

Conclusions Report – port administration processes

Work Package 4

Activity 4.1

PP Responsible: OUC
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OUC

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Contributing Authors

Name	Organisation	Email
Diane Paula Corina Vancea	OUC	economics@ovidius-university.net
Ion Botescu	OUC	ion_botescu@yahoo.com
Cristina Duhnea	OUC	cristina@duhnea.net
Andreea-Daniela Moraru	OUC	moraru.ad@gmail.com

Table of Contents

Table of figures

Table of tables

1 Project description, general information, specific objectives, expected results, and partnership

Project description

The DAPhNE project– Danube Ports Network is co-funded by European Union funds (ERDF, IPA) under the Danube Transnational Programme and it aims at facilitating a balanced development of Danube Ports as eco-friendly, well accessible multimodal hubs for the transport system of the region and to turn them into buzzing economic centres functioning as catalysts for economic growth and creation of high value jobs.

A permanent cooperation between public & private entities along the Danube - ministries, port administrations, port users, specialized consultancy firms, logistics companies, NGOs and universities will contribute to the achievement of the project goal.

The activities aim to improve port legislation, funding of port investments (State Aid Schemes and Public-Private Partnership models), port administration processes**,** port business strategies as well as port infrastructure & industrial development strategies. Special attention is paid to human capacity building and eco-improvement options for the port sector. An innovative port IT community system (electronic platform that connects multiple systems operated by a variety of organisations within the port area) will be tested in real-life and new markets for Danube ports will be analysed (business development determined by arising opportunities from circular economy, usage of alternative fuels, transportation of Liquefied Natural Gas, distribution of renewable energy). The solutions elaborated by the consortium will be shared with more than 60 Danube ports as possible blueprints by building a Danube Port Network, which shall emerge into a Danube Port Network Organisation to ensure durability of the results and their continuous further development.

General information on the project

Start date: 01-01-2017

End date: 30-06-2019

Overall Budget: 2 985 406.15 €

ERDF Contribution: 2 415 219.42 €

IPA Contribution: 122 375.77 €

ENI Contribution: €

Call number: Call 1

Priority: *Better connected and energy responsible Danube region*

Specific objective: *Support environmentally-friendly and safe transport systems and balanced accessibility of urban and rural areas*

Project specific objectives and expected results

DAPhNE has three main specific objectives which are the following:

1. Know-how transfer for a common Danube port development strategy

There are strong differences along the Danube in terms of port infra- and super-structure, port governance, port administration procedures due to an uncoordinated regulatory framework and no/ little funding options. The joint DAPhNE collaboration between private and public port stakeholders is designed to bridge these differences, transfer know-how between Upper, Middle and Lower riparian countries and produce harmonized strategies and tools for stimulating port investments (State Aid Model Scheme).

2. Inter-sectoral & transnational cooperation for better port services

To become sustainable multi-modal hubs, Danube ports need to improve their administrative processes and rely on business strategies that take into account joint regional cooperation and green port development strategies. A better economic port performance is accompanied by an improved environmental status relying on use, provision and distribution of alternative energy. Improved port business strategies also take into account the need for continuous and customized training for port employees.

3. Innovative IT solutions for the Danube Port community

Danube ports need to prove themselves as advanced logistics centres that can provide their users high quality services and detailed live information on the shipments in progress. Specialized IT solutions of port community systems are needed for this and will be tested on a pilot basis in DAPhNE (model architecture for an IT port community system). Concepts like

Logistics 4.0 and the Physical Internet will be investigated to identify how they can be applied to the Danube ports.

The main expected result of the project is the improvement of the collaboration in the Danube region between public and private port sector representatives. The cooperation in the region will be improved and intensified based on the set-up of the Danube Ports Network, a platform which will include all stakeholders relevant for the sustainable development of the Danube ports. It is expected that by the end of the project, 120 members from all Danube riparian countries will have free access to DAPhNE deliverables and outputs. Moreover, the Danube Ports Network will continue to function as a permanent independent entity with the scope of strengthening the ties within the port community, beyond the end date of the project.

The project partnership

Nine out of the ten Danube riparian countries are represented in the DAPhNE consortium enabling a truly transnational work approach, fostering exchange of experiences and preparing the basis of the development and implementation of widely harmonized solutions.

The DAPhNE partners make up a balanced consortium distributed on the Upper, Central & Lower Danube with ample expertise in IWT, port operations, legal & administrative frameworks, research& innovation, education & human resources.

The project partners are key stakeholders for the future development of the Danube ports and are capable to tackle the core problems identified in the work structure and grouped into:

- Port legislation & public funding
- Port administration & management – including HR & eco-improvements for the port sector
- Port development – focused on innovation (IT port community system, new market opportunities).

Public bodies like ministries and port authorities/administrations which provide the regulatory framework for the Danube ports joined forces with private port operators, port associations, specialized consultancy firms, logistics companies and universities.

This close public - private cooperation not only ensures a wide range of expertise from different angles but also guarantees well-balanced solutions in the interest of states and industry.

The partnership structure also ensures quick transferability of the elaborated strategies, pilot actions, guidelines and recommendations and full take up into the public and private sector.

The cooperation of key stakeholders from peer organizations of the entire Danube region provides a sound basis for a Danube Port Network which will be enlarged and developed into an organisation to ensure durability of the output of DAPhNE, as well as the further development of the Danube ports beyond the project.

Lead Partner:

- Pro Danube International (PDI) – Austria

ERDF Partners:

- Ennshafen Port (EHOO) - Austria
- iC consulenten ZT GesmbH (iC) - Austria
- University of Applied Sciences Upper Austria (FHOO) – Austria
- National Company Maritime Danube Ports Administration Galati (APDM) - Romania
- National Company Maritime Ports Administration SA Constanta (MPAC) - Romania
- Ovidius University of Constanta (OUC) - Romania
- Pro Danube Romania (PDR) - Romania
- Ministry of Transport (MT) - Romania
- Bulgarian Ports Infrastructure Company (BPICo) - Bulgaria
- Public Institution Port Authority Vukovar (PAV) - Croatia
- RGO Communications Ltd. (RGO) - Croatia
- ILR Logistica Romania SRL (ILR) - Romania
- Hungarian Federation of Danube Ports (HFIP) - Hungary
- Public Ports jsc (VP.a.s) - Slovakia

IPA Partners:

- Port Governance Agency (PGA) - Serbia

Associated Strategic Partners:

- Container Terminal Enns (CTE) - Austria
- Giurgiu Municipality (Giurgiu) - Romania
- Port of Vienna (PoV) - Austria
- Ministry of the Sea, Transport and Infrastructure(MMATI) - Croatia
- Ministry of Transport, Information Technology & Communications (MTITC) - Bulgaria
- Danube Logistics SRL (DANLOG) - Moldova
- State Enterprise Ukrainian Sea Ports Authority (USPA) – Ukraine
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2 Activity 4.1. Improve and harmonize port administration processes

Work package 4 (WP 4 – Administration & Management) focuses on aspects regarding the administration and management tasks, the improvement and harmonization of port administration processes and consolidating business strategies, and is coordinated by BPICo. Given the wide array of diverse activities covered by ports, ranging from administrative functions to operational functions, bearing in mind the necessity to use resources in a sustainable manner, and paying due attention to human resources, the work package is divided into four activities, as follows: 4.1. Improve and harmonize port administration processes (Responsible Partner OUC), 4.2. Improve port business strategies (Responsible Partner HFIP), 4.3. Human resources development (Responsible Partner FHOO), 4.4. Eco-improvements for Danube ports (Responsible Partner FHOO).

The outputs of the WP4 include two international workshops connected to enhancing and harmonizing port processes and to port management models, recommendations for port processes and port management, and green port policy and capacity building guidelines.

Activity 4.1 focuses on the analysis of port processes applied to port users and its goal is to determine the aspects that need simplification and/or modification in order to increase the efficiency. In order to achieve this goal, a survey will be employed, using as main research tool a questionnaire. The survey will be conducted in all the riparian countries represented in

the project partnership, and five national reports will be subsequently delivered. The national reports conclusions will be integrated in one general report that will emphasize all adjustments required in order to increase port efficiency.

Based on the survey results comprised in the national reports and on additional research work conducted, two reports will be elaborated. The first report will provide good practice examples in port administration. The second report will summarize the conclusions of the five national reports elaborated and it will emphasize the necessary adjustments in order to increase efficiency.

The responsible partner for activity 4.1 is OUC (Ovidius University of Constanta).

OUC has developed the survey instrument – a questionnaire and the template for the national reports, and has provided the final versions of the documents considering the partners' inputs.

The survey was conducted in five riparian countries, as follows:

- Austria – the responsible partner for conducting the survey and the elaboration of the national report is FHOO;
- Bulgaria – the responsible partner for conducting the survey and the elaboration of the national report is BPICo;
- Croatia – the responsible partner for conducting the survey and the elaboration of the national report is PAV;
- Hungary – the responsible partner for conducting the survey and the elaboration of the national report is HFIP;
- Romania – the responsible partner for conducting the survey and the elaboration of the national report is MPAC.
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Objectives of the Sub - activity 4.1. Improve and harmonize port administration processes

Work package 4 aimed at analysing the procedures that port authorities/administrations apply to vessels and terminal operators as well as to other users of port infrastructure and services. Its declared goal is to determine the aspects that need to be simplified, modified, and eliminated in order to increase efficiency and reduce the red tape in connection to port administration processes.

To this end, several activities were scheduled:

- Elaboration of the research tool – questionnaire aimed at investigating port processes;
- Elaboration of a research methodology for conducting the research in the five countries;
- Elaboration of a national report template that would serve a common reporting tool for the countries participating in the survey – Austria, Bulgaria, Croatia, Romania, Hungary;
- Surveys conducted in each of the five countries;
- Data analysis and incorporation of research results within the five national reports, in accordance with the provided national report template;
- Elaboration of a conclusions report that integrates the five national reports;
- Elaboration of a good practice report in port administration

3 Overview of the national reports context and sample structure

The national reports aimed at analysing the procedures that port authorities/administrations apply to vessels and terminal operators and to other users of port infrastructure and services and at determining the aspects to be simplified, modified, or eliminated in order to increase efficiency.

In **Romania**, the research was carried out in six relevant Romanian Danube ports (Constanta, Galati, Brăila, Tulcea, Giurgiu and Drobeta-Turnu Severin) selected on the basis of criteria such as: cargo throughput, the connection with the transport corridors, the development of the port infrastructure, etc.

The port users interviewed for the research included: Terminal operators; Ship owners; Ship agents; Cargo shippers/ cargo owners; Forwarding companies; Road/ railway transport companies; Inspection companies; Other (e.g. classification societies).

Since the port administration's response rate was 100%, the data collected is relevant and sufficient to have an overview of the elements studied for this report.

Particularities and disparities between ports were generated by the following aspects: Direct access to seagoing ship routes (the case of the Port of Constanta); Total cargo throughput; Hinterland connections; Infrastructure development; Hinterland potential economic development; Level of co-operation among port stakeholders.

Ports have the ability to operate almost all types of goods, but their traffic is still linked to the economic characteristics of their hinterland.

There is a real need in the hinterland for the development of container traffic, but the navigation conditions on the Danube and the development of the infrastructure are still barriers to be addressed in the next future.

In ports such as Galati and Giurgiu there already are initiatives for the development of multimodal platforms, financed through European projects, which will improve the response to this demand.

The port processes analysed are considered to be of medium complexity, and their improvement is primarily due to the cooperation capacity of port stakeholders.

Initiatives to harmonize administrative procedures and to address port processes are rarely found, most of them being the result of projects implemented or under implementation.

Even if the operation of a quality management system is not a legal requirement, all port administrations operate such a system, and, in all cases, it is integrated with another one or two other management systems based on international standards.

The processes considered as improved by port administrations during the last 10 years are: Managerial planning, Integrated management policy, Planning and control of risks, Providing port services, Communication with port stakeholders, Ship movement monitoring.

There still is a high level of expectation regarding the harmonization of practices along the Danube, so that port users can optimize their specific activities.

The area considered to have an increased need for improvement remains the ship inspection procedure on port arrival.

A better communication between institutions from different European countries could be a solution. Also, the use of information systems to allow for better reporting and monitoring is strictly needed.

Extending the good practices of Danube ports to other similar ports is also a good opportunity for improvement.

For the Romanian Danube ports, the main source of developing good practices proved to be the European projects implemented or being under implementation.

For **Bulgaria**, the participants in the research were as follows: Port administration/ authority[1] (MTITC and secondary administrations within its structure: 1. Executive Agency for Exploration and Maintenance of the Danube River; 2.Bulgarian Ports Infrastructure Company.); Port operators (Port Invest ltd. – operator for port terminal Lom; Rousse Free Zone JSCo.; Port Complex Ruse JSCo. – operator of terminals Ruse – East, Ruse – Center, Tutrakan and Silistra; Dredging fleet "Istar" JSCo. – operator for port terminal Svishtov); Private port owners and operators (Port Svishtov West JSCo. – operator of Port Svishtov – Sviloza; ADM Bulgaria Logistics ltd. – operator of Port ADM Silistra); Forwarding companies (Donau Transit ltd.; Holleman Bulgaria ltd.; Werta ltd.; Rubicon Shipping ltd.; Hermes Lind ltd.; Despred AD Branch Ruse); Ship agents (Andreea Shipping and Trading ltd., Port Invest ltd. as a ship agent, Holleman Bulgaria ltd.).

The questionnaire was not filled in by control organizations and inspections. The BPICo and MTITC in their capacity as authorities filled it in, and the EAEMDR as an administration.

The questionnaires were received from different categories of respondents with headquarters in Silistra, Ruse, Svishtov, Lom, and Sofia. Except information about smaller terminals, the report presents the views of the port authorities and port users about the biggest port centres on the Danube in Bulgaria - Ruse-East, Svishtov, and Lom.

For **Croatia**, in the first part of the research only Port Authority Vukovar acted as respondent.

Regarding the second part of the survey, research was conducted among the port users that relate to Port of Vukovar. Focus was on Port of Vukovar due to fact that this is only Croatian cargo port located on the Danube River. The port users' categories that participated in the survey were as follows: Port operators; Port agents; Forwarders company; Quality control company; Ship-owners (only one ship-owner who in fact is port operator with tugboat for providing port towing service).

[1] The current port management structure in Bulgaria is characterized by typical responsibilities and responsibilities in port management, shared between the government, in conjunction with MTITC, EA Maritime Administration and BPICo. There is no independent port authority in the current Bulgarian model of port management. For the purposes of the survey conducted and with regard to the functions and responsibilities of the various entities, MTITC and BPICo. are designated as port authority, and the EAEMDR - as port administration.

For **Austria**, the respondents were the Ennshafen Port and the port of Vienna including potential port users, which are using these two ports. These two ports were indicated as two important ports in Austria, since they are important trimodal hubs within Austria, connecting companies situated in Eastern and Western Austria and important industrial areas as well as other European countries. Even though, the highest volume of cargo is transshipped waterside in the company port of Voestalpine in Linz, the Ennshafen port and the port of Vienna were chosen as target ports of this survey.

Concerning the considered port authorities/owners in this survey, both ports have almost the same infrastructural conditions. However, there are differences in terms of administrative processes performed by these two organizations (see section 4.1.7 in the national report). There are also differences in terms of services provided by the organizations. For example, the port authority of Ennshafen port does not provide any logistics services but the port authority from the port of Vienna does (see section 4.1.8 in the national report). This may be due to the different port management models – the port of Vienna is a public service port with minor landlord activities and the Ennshafen port is mainly oriented towards a landlord port. Both organizations evaluated administrative processes in connection with construction, maintaining & repairing of port infrastructure as complex. Other administrative processes were evaluated as relatively complex which indicates that there is room for improvement for the stated administrative processes in the questionnaire (see section 4.1.10 in the national report). Both organizations are part of a consortium/association in order to promote ports or represent the interests of ports in Austria such as IGÖD (Austrian Public Ports). Another possibility is that they are aware of different initiatives, which aim to promote ports as important logistics hubs in Austria such as DAPhNE, DANTE or DBS Gateway. This indicates that both organizations recognize the importance to further promote ports in Austria as important logistics hubs in the future. It is interesting that the trend of digitalization, which is currently very important and present in the field of logistics, is also recognized by both organizations. Both organizations indicated that they use electronic exchange of information with the port users and indicated that this a relevant service for the operation of a port. Both organizations indicated that only few administrative processes have improved in the past five years (e.g. documentation was facilitated, general IT support was

improved). This indicated, that there is still room for improvement in this context in Austrian ports.

Concerning the port users, it can be said that the answers from the respondents in the port user category are quite similar. Port users of both considered ports indicated the same administrative processes such as "loading and unloading (including special and heavy lift cargo)" and "Storage and Warehousing" with the greatest potential for improvement (e.g. the tariff system and complexity related to fiscal legislation for these two processes may be improved).

The category, which was ranked best by all respondents, are safety and security. Concerning the other categories which were evaluated in this survey no great discrepancies between the Ennshafen port and the Port of Vienna were identified. These categories are: communication with port administration; berth allocating & port acceptance process; loading & unloading; Ro-Ro services, loading and unloading of trucks, cars and other special vehicles and roll stocks to and from ships; port manoeuvring process and transhipment. All findings are mostly in the medium range (2-3), therefore it can be said that there is still room for improvement in all evaluated categories.

Concerning the current administrative processes there was only one difference between the respondents, the port users from the port of Vienna (terminal operators and forwarding companies) mentioned that they do not have any paper copies of the electronic data in contrast to the port users of the Ennshafen port.

For **Hungary**, there were identified 42 potential respondents, but eventually were received only 18 filled in questionnaires.

Regardless of the annual turnover, capacity, area, relations with other industries, location or main profile and core services of ports, most of them have either no problem with the current administrative processes in Hungary or would not like to share with the public, if any. Hard to tell which is truer due to respondents' laconism or the possibility to simply say yes or no to YES/NO questions in the questionnaire.

Users are mostly satisfied with processes in ports both in terms of speed and complexity. In almost every case, respondents have very similar opinions. However, there is no agreement among them whether port administrative processes have been improved in the previous years. Half of them told that processes could become clearer due to IT based services,

more detailed data collection and better experts, while the other half of them disagreed, saying no change has happened at all, e.g. speed of loading is the same, EKÁER (Electronic Public Road Trade Control System) has made transhipping from/to road a lot more difficult and complicated, all in all, slower.

Among port owners / authorities and administrative bodies, who answered the questions, their permits, certificates for overall operation of the ports are valid for 6-7 years from now on in cases of 6 out of 11 ports.

Future directions for development and harmonization of Danube ports

80% of respondents did not or did not want to name their comments, ideas about further developments of administrative processes in Danube ports. The only constructive answer was to introduce a centralized electronic gate system to standardize and make processes quicker especially at border-crossing ports.

4 General information regarding the research conducted

In all of the five riparian countries listed below, the research was conducted between September and December 2017.

Table 1: The number of filled in questionnaires

Country	Filled in questionnaires		Rate of non-responses	
	Port administrations	Port users	Port administrations	Port users
Austria	2	5	0 %	86%
Bulgaria	9	13	47 %	81%
Croatia	1	4	0 %	60%
Romania	6	52	0 %	60 %
Hungary	11	7	44 %	41 %

Source: compiled based on the national reports

The main problems and limitations of the research identified by the five partners in charge of the national reports:

The following problems were encountered during the research process:

Romania

- Very low interest in taking surveys, the 40% being reached after significant efforts
- Respondents' mistrust in the ability to contribute to change the port industry environment
- Lack of openness in communicating data, subject to the requirement to record the company and the name of the responsible person
- Unavailability of time in private organizations to address topics such as those of this study.

Bulgaria

- The amendment of the questionnaire after it was already sent to the recipients. This resulted in receiving partial information from some of the respondents, as only some of the questions of the original template are retained in the latest version of the document. The change of the questionnaire led to the need for additional contact with respondents to supplement the information or if they refused to cooperate - a further study by the Consultant of this report.
- Another problem was the lack of feedback from a large number of respondents. This led to incomplete coverage of the situation in Bulgaria. To get a clear view of the current situation, besides analysing the received questionnaires, a further study of publicly known data on the port sector in the country was carried out.
- Another major obstacle was the circumstance that some of the respondents expressed the opinion that the questions are either not relevant to their activity or do not correctly and fully reflect the information they provide. This had an additional negative effect on the level of feedback.
- The willingness of the participants to fill in the questionnaire quickly has led to a formal answer to questions from most respondents and where open responses are required, they are not filled in at all.

Croatia

- A lack of interest for participation;
- Questionnaires filled mostly with putting tick, no additional explanation given;
- Necessary to provide interview with port users by phone or face to face;
- Lack of time in private organization to do the interview.

Austria

- concerning the survey design, the problem concerning getting a certain response rate was encountered
- not all respondents were able to answer all questions of the questionnaire – thus some information might still be missing
- it was necessary to contact a few respondents more than once (e.g. reminder via email and call) to get a response

Hungary

- Original questionnaire had to be translated first into Hungarian to achieve higher rate of responses due to stakeholders' lack of foreign language skills. Answers had to be translated back to English. It took time and there was a chance some terms were not equal in English and in Hungarian.
- Having influent and unclear conditions of creating the original questionnaire, i.e. partners created newer and newer versions of it, resulted difficulties once an earlier version had been already sent to stakeholders, potential respondents. It was not easy to convince them to answer again once they already did.

Limitations of the research:

Romania

The research was carried out in the relevant Romanian Danube ports (Constanta, Galati, Brăila, Tulcea, Giurgiu, Drobeta-Turnu Severin) selected on the basis of criteria such as: cargo throughput, the connection with the transport corridors, the development of the port infrastructure, etc.

All other Romanian ports are operating small quantities of cargo and they have a low level of potential development in the next future.

The selection of relevant ports was correlated to those ports included in the previous studies carried out under this project in order to assure the traceability of data.

Croatia

- In Vukovar Port there are only 4 port operators dealing with cargo. The Questionnaires were sent also to ship agents and other service providers (quality control etc.);

- A small number of Danube cargo ports in Croatia, only one, survey possible to conduct only in the Port of Vukovar;
- Not possible to provide comparison between Danube ports at national level;
- A small number of port users needed for the survey;
- Lack of ship-owners as port users at the national level.

Austria

- Not all ports from Austria were included in the survey – thus not all port authorities and port users are represented in this report. However, this report may provide a first overview of the current situation in Austria.
- Since a quantitative questionnaire was used for this report, no detailed information can be provided about the main challenges in the observed ports as may be possible by applying a qualitative survey.

Hungary

The questionnaire seemed to expect absolutely competent and engaged respondents. However, most of them were not committed, nor active respondent, nor experienced in some fields if we were curious about their opinions.

Problems and limitations of the research identified by OUC (limitations of the results obtained with regard to their integration in the conclusions report):

Problems:

- Lack of interest in taking part in the survey;
- The necessity to translate the questionnaire in national languages;
- Lack of openness, limited time resources;
- Lack of trust as to the relevance and impact of the respondents' efforts to participate in the survey;
- General English phrasing and syntax used in the national reports has led to the impossibility to understand correctly the intended meaning in several cases and required further correspondence in view of proper understanding;
- Due to the introduction of the second version of the questionnaire, in some cases the answers remained those gathered before the change (the scale was inverted in the second

version); the interpretation of the results took into account the significance of the scale, so that the research results were conclusive;

- In some cases, where scales were recommended for assessment, the reports did not record the average score;

Limitations of research identified by OUC;

- The research methodology recommended that each partner responsible for the elaboration of the national report would decide upon the number of respondents in order to ensure the representativeness of the sample. However, there were significant differences in the number of participants in the survey in each of the five countries. In three national reports, the limited number of respondents and/or of ports covered by the survey was mentioned as a limitation of the research. However, this choice was the responsibility of each partner in charge of elaborating the national report;
- Recommendations were made for obtaining necessary information where opinions and supplementary information were requested, thus covering both the quantitative and the qualitative dimensions of the research; however, in several cases only laconic answers were provided;
- In the case of Austria, there were not provided good practice examples.

Immanent and inevitable challenges were encountered during the research phase due to the complexity of the research, the geographical spread of the respondents, the language barriers as well as the particularities of each of the five countries involved in the survey. During this research, as well as in the cases of similar studies of such high magnitude and spread, several problems arose. The efforts made by the partners responsible for the five national reports, as well as the collaboration within the partnership contributed to overcoming most of those problems.

Although there were listed also limitations of the conducted research, the national reports contain valuable information and provide an adequate overview on the port administrative processes along the Danube, that constitute a solid base for the identification of harmonization directions, in accordance with the project objectives.

5 General presentation of the Danube Ports in the five countries

The analysis of the port processes in order to identify the directions of their harmonization, took into account five countries: Romania, Bulgaria, Hungary, Croatia and Austria. In order to carry out the survey, each partner responsible for the national report decided the selection of the ports that were the subject of the research.

Romania

The research was carried out in the relevant Romanian Danube ports (Constanta, Galati, Brăila, Tulcea, Giurgiu, Drobeta-Turnu Severin) selected on the basis of criteria such as: cargo throughput, the connection with the transport corridors, the development of the port infrastructure, etc.

All other Romanian ports are operating small quantities of cargo and they have a low level of development potential in the future.

The selection of the relevant ports was correlated to those ports included in the previous studies carried out under this project in order to assure the traceability of data.

The present report is based on the analysis of **six relevant Danube ports in Romania**. The six ports are administrated by three port administrations as follows:

The Maritime Ports Administration Constanța: the Port of Constanța.

The Maritime Danube Ports Administration Galați: the Port of Galați, the Port of Brăila, the Port of Tulcea.

The River Danube Ports Administration Giurgiu: the Port of Giurgiu, the Port of Drobeta-Turnu Severin.

All the ports are landlord ports. The owner of the land is the state represented by the Ministry of Transport, and the three national companies signed a concession contract in order to act as port administrator.

The port infrastructure is rented to the port operators for a period of 1 to 10 years based on the investments made and may be extended by another 10 years.

Port of Constanța

The Port of Constanta is located on the Western coast of the Black Sea, at 179 nautical miles from the Bosphorus Strait. The connection of the port with the Danube River is made through the Danube-Black Sea Canal, ending the Rhine-Danube Corridor, which provides the main east-west link across Continental Europe.

The port authority is CN Administraţia Porturilor Maritime SA Constanţa (the National Company "Maritime Ports Administration" of Constanta) – a joint stock company established by Government Resolution no. 517 / 1998 to act as port administration for Constanţa and its maritime satellite ports (Mangalia, Midia, Tomis Marina).

The port includes a total surface of 39,260,000 m^2, having 33 terminals and 156 berths, out of which 140 are operational.

The port has 120 mil. tons capacity for cargo turnover, but the annual cargo throughput is about 60 mil. tons, including the maritime and inland water operated cargo.

Port of Galaţi

Galati County is located in the eastern part of Romania, in the southernmost point of Moldovas plateau. Located on the left bank of the Danube, it covers an area of 246.4 km^2, at the intersection of Siret river (in the west) and Prut river (in the east), near Brates lake.

The port authority is CN Administraţia Porturilor Dunării Maritime SA Galaţi (the National Company "Maritime Danube Ports Administration" – Galati) - a joint stock company established by Government Resolution no. 518 / 1998 to act as port administration for the Danube ports from Brăila to Sulina.

The port includes a total surface of 864,131 m^2, having 4 terminals and 56 berths with 28.4 mil. tons capacity for cargo turnover.

Port of Brăila

The Port of Braila is the second river port of the Danube, situated west of the Danube Delta between Km 167 and Km 175 (Ordinance 2/2015) upstream from Sulina, 19.2 km from Galati.

The port authority is CN Administraţia Porturilor Dunării Maritime SA Galati (the National Company "Maritime Danube Ports Administration" – Galati).

The port includes a total surface of 398,630 m^2, having one terminal and 25 berths with 2.53 mil. tons capacity for cargo turnover.

Port of Tulcea

The Port of Tulcea is one of the largest and most important Romanian river ports. Located in the city of Tulcea on the right bank of the Danube, between km 70.0 and km 73.5 including the Industrial and Commercial sectors.

The port authority is CN Administraţia Porturilor Dunării Maritime SA Galati (the National Company "Maritime Danube Ports Administration" – Galati).

The port includes a total surface of 82,762 m^2, having one terminal and 41 berths with 1.99 mil. tons capacity for cargo turnover.

Port of Giurgiu

The Port of Giurgiu is located on the left bank of the Danube at km 489-497. The port is considered to be the port of the TEN-T central network. It is located at the intersection of the Danube River and Corridor IX, which is on the north-south route between the Baltic countries and Bulgaria, Greece and Turkey.

The port authority is CN Administraţia Porturilor Dunării Fluviale SA Giurgiu (the National Company "Administration of Danube River Ports" – Giurgiu) – a joint stock company established by Government Resolution no. 520 / 1998 to act as port administration for Danube ports from Drobeta-Turnu Severin to Brăila.

The port includes a total surface of 393,035 m^2, having one terminal and 23 berths with 2.5 mil. tons capacity for cargo turnover.

Port of Drobeta-Turnu Severin

The Port of Drobeta Turnu Severin is located on the left bank of the Danube at km 927-934 (near the water storage Hydroelectric and Navigation Complex Portile de Fier 2).

The port authority is CN Administraţia Porturilor Dunării Fluviale SA Giurgiu (the National Company "Administration of Danube River Ports" – Giurgiu).

The port includes a total surface of 137,592 m^2, having two terminals and 7 berths with 0.5 mil. tons capacity for cargo turnover.

Bulgaria

There are 38 port terminals in the Bulgarian section of the Danube River. 15 of them are public transport ports of national importance, 20 are ports of regional importance and 3 are ports of special purpose.

The study of the port terminals located in the Bulgarian section of the Danube River falls within the territorial scope of the two Branches-Territorial Directorates of BPICo, Ruse and Lom respectively. The territorial distribution of the ports and their terminals is based on NUTS 3 (Classification of Territorial Units for Statistics).

The area of operation of the Branch-Territorial Directorate Ruse is from kilometre 374,100 to kilometre 645 of the Bulgarian section of the Danube River with head office Ruse. Branch-Territorial Directorate Ruse serves the infrastructure of:

Public transport ports of national importance Ruse

1. **Port terminal Ruse - east** is part of public transport port of national importance Ruse. It is specialized for general, bulk and liquid cargo, ro-ro and containers; mooring services; supply of electricity, water and communications to vessels; supply of food and other products.

Berths: 14

Capacity: 2 500 000 t/y.

Total Length of Berths: 1490 m

Maximum actual depth in front of berths: 2,50 m

Opened storage area: 190 500 sq.m.

Covered storage area: 15 800 sq.m.

Operator: Port Complex Ruse JSCo.

Figure 1: Port terminal Ruse – East

Source: National report – Bulgaria

2. **Port terminal Ruse – centre** is part of public transport port of national importance Ruse. It is specialized for passenger services; mooring services; supply of electricity, water and communications to vessels.

Berths: 3 /currently equipped with only one pontoon for one berth/

Total Length of Berths: 270 m

Maximum actual depth in front of Berths: 2,50 m

Operator: Port Complex Ruse J.S.Co.

3. **Port terminal Ruse – West** is part of Public transport port of national importance Ruse. It is designed for handling cargo and mail; mooring services; supply of electricity and communications to vessels; supply of food and other products.

Berths: 12

Total Length of Berths: 1395 m

Maximum actual depth in front of Berths: 2,50 m

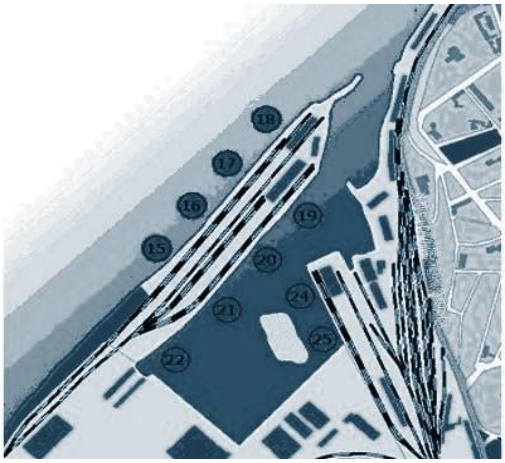
Capacity: approx. 2 000 000 t/y

Opened storage area: 27 600 sq.m.

Covered storage area: 8 900 sq.m.

Operator: Bulgarian Ports Infrastructure Company

Figure 2: Port terminal Ruse – West



Source: National report – Bulgaria

4. **Port terminal Silistra /passenger/** is part of Public transport port of national importance Ruse. It is designed for passenger services; mooring services; supply of electricity and communications to vessels; ship bunkering /water, fuel, oils/; supply of food and other products.

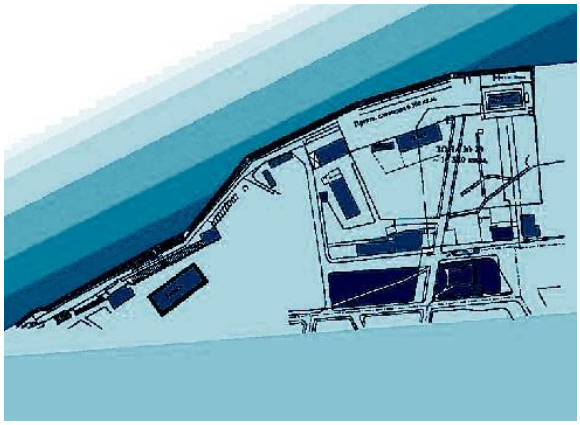
Berths: 3

Total Length of Berths: 300 m

Maximum actual depth in front of Berths: 2,00 m

Operator: Port Complex Ruse J.S.Co.

Figure 3: Port terminal Silistra



Source: National report – Bulgaria

5. **Port terminal Tutrakan** is part of Public transport port of national importance Ruse. It is designed for general and bulk cargo handling; passenger services; mooring services; supply of electricity, water and communications to vessels; supply of food and other products.

Berths: 2

Total Length of Berths: 110 m

Maximum actual depth in front of Berths: 1,00 m

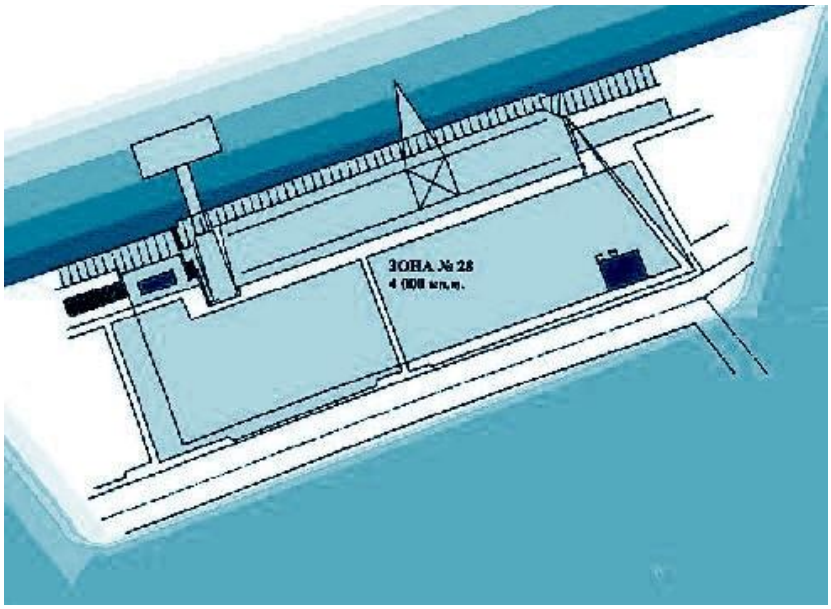
Capacity: 100 000 t/y

Opened storage area: 2 500 sq.m.

Covered storage area: 0 sq.m.

Operator: Port Complex Ruse J.S.Co.

Figure 4: *Port terminal Tutrakan*



Source: National report – Bulgaria

6. **Port terminal Svishtov** is part of Public transport port of national importance Ruse. It is designed for general, bulk and liquid cargo handling; passenger services; Ro-Ro services.

Berths: 8

Total Length of Berths: 902 m

Maximum actual depth in front of Berths: 2,50 m

Capacity: 1 000 000 t/y

Opened storage area: 22 800 sq.m.

Covered storage area: 6 100 sq.m.

Concessionaire: Dredging fleet “Istar” JSCo.

Figure 5: Port terminal Svishtov

Source: National report – Bulgaria

7. **Port terminal Somovit** is part of Public transport port of national importance Ruse. It is designed for general and bulk cargo handling; passenger services; mooring services; mooring; supply of electricity, water and communications to vessels; supply of food and other products.

Berths: 3

Total Length of Berths: 300 m

Maximum actual depth in front of Berths: 2,50 m

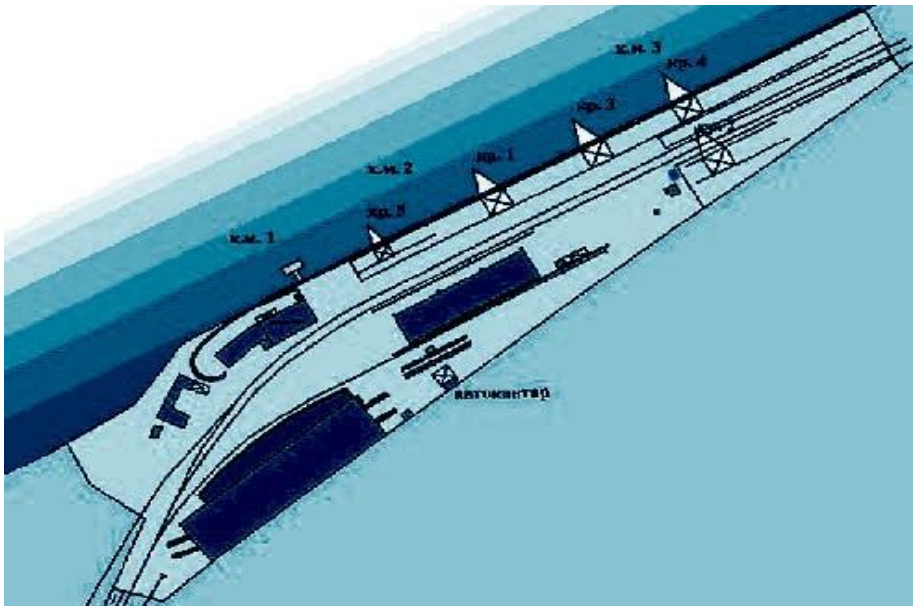
Capacity: approx. 500 000 t/y

Opened storage area: 9 700 sq.m.

Covered storage area: 2 175 sq.m.

Concessionaire: „Octopod - C" ltd.

Figure 6: Port terminal Somovit



Source: National report – Bulgaria

8. **Ferryboat terminal Silistra** (not in exploitation) is part of Public transport port of national importance Ruse for Ro-Ro and mail handling; passenger services.

Berths: 1

Total Length of Berths: 30 m

Maximum actual depth in front of Berths: 1,10 m

Operator: Bulgarian Ports Infrastructure Company

Figure 7: *Ferryboat terminal Silistra*

Source: National report – Bulgaria

9. **Ferryboat terminal Nikopol** is part of Public transport port of national importance Ruse. It is designed for ro-ro and ferry services for vehicles, buses, agricultural and other self-propelled machines; passenger services; mooring; supply of electricity and communications to vessels; supply of food and other products.

Berths: 1

Total Length of Berths: 30 m

Maximum actual depth in front of Berths: 2,50 m

Concessionaire: Bulgarian River Shipping J.S.Co.

Figure 8: "Ferry terminal Nikopol";

Source: National report – Bulgaria

<u>Public transport ports of regional importance Ruse</u>

1. Silistra – Polaris 8 – general and bulk cargo handling;

2. Silistra - Lesil – general and bulk cargo handling; mooring; supply of electricity and communications to vessels;

3. ADM Silistra – bulk cargo handling;

4. Ruse – Oil terminal Arbis - processing of oil products and bunkering;

5. Port Bulmarket – Ruse – general, bulk and liquid cargo handling, including dangerous cargo – classes 2, 3 and 9; mooring services; supply of electricity and communications to vessels; bunkering; reception and processing of ship generated waste;

6. Danube dredging fleet - Ruse - general and bulk cargo handling; supply of electricity, water and communications to vessels; mooring services; bunkering; towing;

7. Sviloza terminal - general and bulk cargo handling; supply of electricity, water and communications to vessels;

8. TPP Sviloza terminal - general and bulk cargo handling; supply of electricity, water and communications to vessels; towing/dragging/; supply of food and other products and services related to vessels;

9. Petrol – Somovit – processing of oil products and bunkering;

10. Ruse – Free zone - processing of oil products; mooring; bunkering;

11. Belene - general and bulk cargo handling;

12. Nikopol – passenger services;

13. Dubal Ve Ko – Ruse - general and bulk cargo handling; supply of electricity and communications to vessels;

14. East Point – Silistra – passenger services; mooring; supply of electricity, water and communications to vessels; bunkering; supply of food and other products;

15. Pristis - passenger services; mooring; supply of electricity, water and communications to vessels; bunkering; supply of food and other products.

Special purpose ports under art. 109 of MSIWPRBA

1. Special purpose port of Executive Agency for Exploration and Maintenance of the Danube River - Ruse - Stay and repair of vessels, mooring and supply of electricity and water, hydrotechnical research and construction;

2. Special purpose port „Rousse Shipyard West" - Shipbuilding and repair;

3. Special purpose port „River service - Ruse" - repair of vessels; mooring; supply of electricity and communications to vessels; bunkering.

Region of operation of Branch-Territorial Directorate Lom is from kilometer 645 to kilometer 845,650 of the Bulgarian section of the Danube River with Head office in Lom. Branch- Territorial Directorate Lom serves the infrastructure of:

Public transport ports of national importance Lom

1. **Port terminal Lom** is part of Public transport port of national importance Lom and is specialized in general and bulk cargo handling.

Berths: 13

Total Length of Berths: 1335 m

Maximum actual depth in front of Berths: 2,40 m

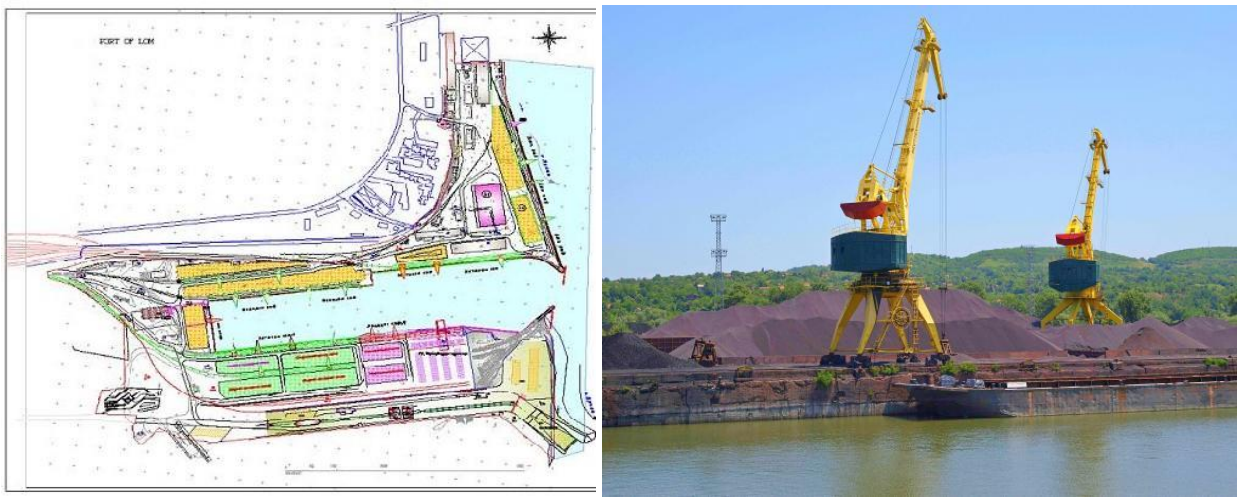
Capacity: approx. 2 500 000 t/y.

Opened storage area: 58 000 sq.m.

Covered storage area: 8 343 sq.m.

Operator: Port Invest ltd.

Figure 9: *Port terminal Lom*



Source: National report – Bulgaria

2. **Port terminal Oryahovo** is part of Public transport port of national importance Lom and is specialized in general and bulk cargo handling; passenger services; supply of electricity and water to vessels.

Berths: 3

Total Length of Berths: 221 m

Maximum actual depth in front of Berths: 2,40 m

Capacity: approx. 500 000 t/y

Opened storage area: 4 400 sq.m.

Covered storage area: 962 sq.m.

Concessionaire: Slanchev Dar AD

Figure 10: Port terminal Oryahovo

Source: National report – Bulgaria

3. **Port terminal Vidin - Center** is part of Public transport port of national importance Vidin and is specialized in passenger services; supply of electricity and water to vessels.

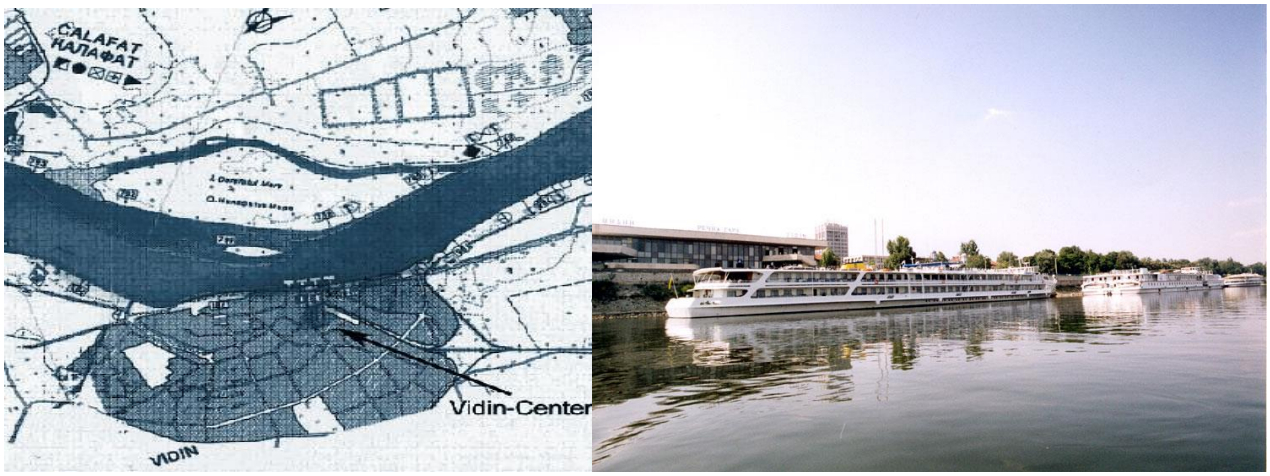
Berths: 4

Total Length of Berths: 1 440 m

Maximum actual depth in front of Berths: 2,40 m

Operator: Port Vidin ltd.

Figure 11: *Port terminal Vidin – Center*



Source: National report – Bulgaria

4. **Port terminal Vidin – South** is part of Public transport port of national importance Vidin and is specialized in general and bulk cargo handling; supply of electricity to vessels.

Berths: 2

Total Length of Berths: 208 m

Maximum actual depth in front of Berths: 2,40 m

Capacity: approx. 500 000 t/y

Opened storage area: 18 000 sq.m.

Operator: Bulgarian Ports Infrastructure Company

Figure 12: Port terminal Vidin – South

Source: National report – Bulgaria

5. **Port terminal Vidin – North** is part of Public transport port of national importance Vidin and is specialized in general, bulk, non-hazardous liquid cargo and containers handling; supply of electricity, water and communications to vessels; supply of food and other products; preventing oil spills and cleaning of oil pollution; and other services.

Berths: 3

Total Length of Berths: 300 m

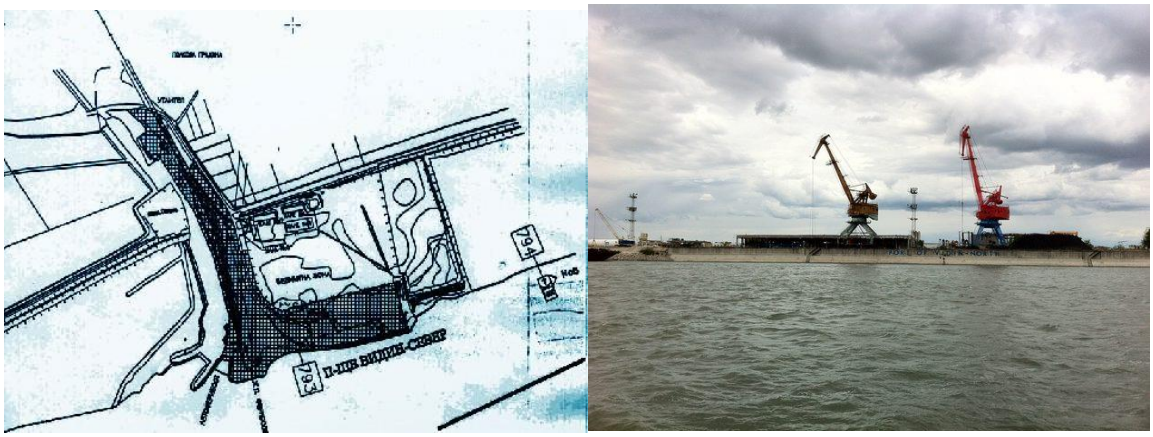
Maximum actual depth in front of Berths: 2,40 m

Capacity: approx. 300 000 t/y

Opened storage area: 10 000 sq.m.

Concessionaire: Bulgarian River Shipping J.S.Co.

Figure 13: Port terminal Vidin – North



Source: National report – Bulgaria

6. **Port terminal Ferryboat Complex Vidin** is part of Public transport port of national importance Vidin and is specialized in Ro-Ro and passenger services; supply of electricity, water and communications to vessels.

Berths: 1

Total Length of Berths: 40 m

Maximum actual depth in front of Berths: 2,40 m

Concessionaire: Bulgarian River Shipping J.S.Co.

Figure 14: № Port terminal Ferry Complex Vidin

Source: National report – Bulgaria

Public transport ports of regional importance Lom

1. Ro-Ro SOMAT – Vidin – Ro-Ro handling; mooring; supply of electricity, water and communications to vessels;
2. Ferryboat Complex – Oryahovo - Ro-Ro handling and passenger services;
3. Ecopetroleum – Vidin (Taifun) – processing of oil products and bunkering;
4. Danube dredging fleet Dunim – Kozloduy - general and bulk cargo handling;
5. Danube dredging fleet Badin – Vidin - general and bulk cargo handling; mooring; supply of electricity and water to vessels;
6. Free zone – Vidin - processing of oil products and bunkering.

Croatia

The research was conducted with the purpose to analyse the procedures that port authorities/administrations apply in Croatian Danube ports towards vessels and terminal operators as well as other users of port infrastructure and services. There is only one cargo port on Croatian stretch of Danube River – Port of Vukovar.

The Port of Vukovar is located on the right bank of the Danube River on the river kilometre 1335+000. The total port area is around 26 ha with no space for further development. At the same time, the railway infrastructure modernization and electrification project is in progress and it will reduce the existing port area for approximately 5, 8 ha.

The Port of Vukovar is an open shore type of port with no port basins. It has a maximum draft of 2,6 meters and a cargo handling capacity of 2 mil. tons per year. There are no capacities for container handling in the port at this moment. There are capacities for high and heavy and out-of-gauge cargoes.

There are 7 terminals in the port which all have access to road, rail and IWW:

- Bulk cargo terminal,
- Grains terminal
- Break bulk (general) cargo terminal
- Two liquid cargo terminals
- Multipurpose cargo terminal
- Palletized cargo terminal.

Length of the quay is 1700 m, 260 m is a vertical quay and 1000 m sloped quay. There is also a 400 m of undeveloped quay. The port has 3 road entrances with 6 lanes. The total length of quay side railway track is 800 m, total length of the railway tracks is 3000 m.

The capacity of the storage is 13000 m^2 for dry bulk and general cargo and 10000 m^3 for liquid cargo. Bunker supply is provided in the bunker area. The port has facilities for ship generated waste as well as for the used oil, but this equipment is not in operation at the moment.

The Vukovar Port Authority is a public institution founded by the Republic of Croatia in 2001 for management and development of the Vukovar Port and all wharfs of public interest on Danube River in Croatia. The Port Authority is responsible for the port management and the functionality of the port. Most of the whole land within the port area is state owned, except land of the grains terminal where port operator VUPIK d.d. obtains its activities - port service as a concessionaire. In the Port of Vukovar four port operators have concession for port services providing. The concession is granted by the Port Authority Vukovar.

A brief introduction of port operators - concessionaires that provide port services within the port area of the Port of Vukovar:

a) Luka Vukovar d.o.o. is a port operator with concession for providing port services on the bulk cargo terminal, general cargo terminal, multipurpose cargo terminal and palletized cargo terminal. On the afore mentioned terminals port operator provides following

port services: nautical, transport and port agency services, where nautical services include mooring and unmooring of vessel and port towing service, while transport service includes cargo loading, unloading, transhipment and cargo stowage. Concession was given for the period of the 20 years in _____ and shall expire in _____ year.

b) Nautica Vukovar d.o.o. is a port operator with concession for providing port services on the liquid cargo terminal for vessel supply with fuel – bunker station. Port operator provides port services as: vessel supply with fuel, transhipment and storage of the fuel on the terminal, as well as providing agency and forwarders services for whole port area. Concession was given for the period of 12 years and has expired in 2017. Concession has been prolonged until the new concession tender procedure is finished and a new concession is granted. The concession shall be for the next 12 years.

c) Lukoil Croatia d.o.o. is a port operator with concession for providing port services on the terminal for liquid cargo for providing the following services: transhipment and storage of oil and oil products on the terminal. Concession was given for the period of 12 years and has expired in 2017. Concession has been prolonged until the new concession tender procedure is finished and a new concession is granted. The concession shall be for the next 12 years.

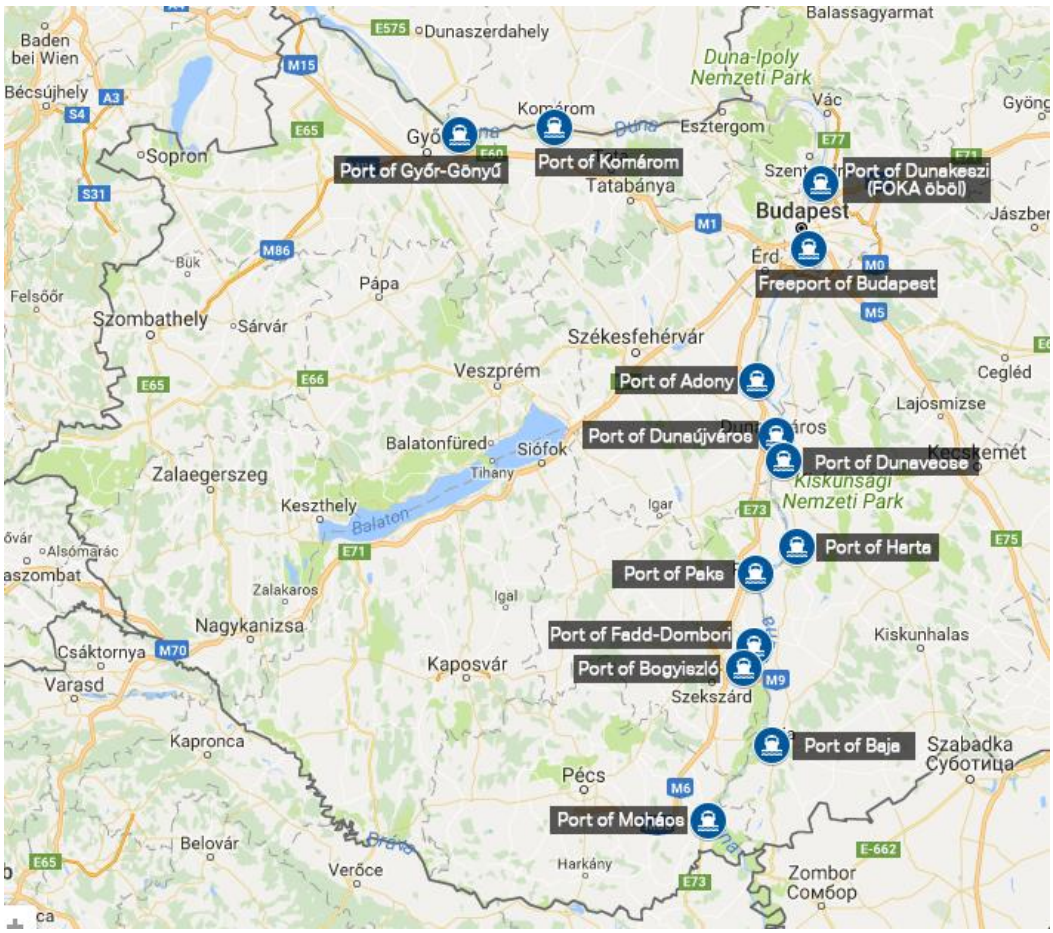
d) VUPIK d.d. is port operator dealing with agricultural products and has concession for providing port services on the grains cargo terminal. On the terminal port operator provides services of cargo loading, unloading, transhipment and cargo stowage. Concession was given for the period of 10 years and has expired in 2017. The concession has been prolonged until the new concession tender procedure is finished and a new concession is granted. The concession shall be for the next 12 years.

Hungary

There were 18 respondents, including the representatives of the biggest 3-4 port organizations (Győr-Gönyű, Budapest, Dunaújváros, Baja) that answered the questions, so did a few of some smaller and mid-sized ports. However, a higher rate of response would have made statistics clearer and more well-established, even though, we can state that answers

mostly cover the conditions of Hungarian Danube ports as far as their numeric data and opinions are concerned.[2]

Figure 15: **Hungarian ports along the Danube**



Source: National report - Hungary

[2] National report – Hungary: Even though, when translating the questionnaire, we took care about terms to cover their meanings and what we would like to get to know, in a few cases, respondents chose the opposite of what they should have e.g. port operators said they were administrative bodies and vice versa. This made processing and analyzing the answers less consistent.

Basic infrastructure (total area, terminals, berths, transport links)

Average of total areas of ports under the survey is 1 483 830 m^2, the largest is in Budapest, belonging to the state-owned MAHART-Freeport Ltd. with 160 hectares, 18 terminals and intermodal links to railways and highways. The smallest port is owned by a private company, Blóker Zrt. covering 2000 m^2, having 1 terminal and connected only to roads.

Average number of terminals is more than 4, but most of the ports have less than that. Most of the ports have railway lines besides road connections. This means that many of the Hungarian Danube ports are intermodal hubs on either local or regional or even national levels.

Capacities for cargo turnover

Average of annual turnover (including all transport modes) is 770 000 tons in ports and sum is 8 470 000 tons overall according to the answers, which is around the usual 8 000 000 tons of national turnover. Moreover, it exceeds the usual sum due to rough estimations provided by the respondents.

Ownership structures

Most of the ports (8/11) are private owned. The biggest port in the country considering the annual turnover is the port of Dunaújváros also known as ISD DUNAFERR Ltd. It belongs to a private company while the second biggest port in Hungary, Freeport of Budapest has a more complex ownership structure. MAHART-Szabadkikötő Zrt. as the owner represents the Hungarian State in the port, while Budapest DOCK – Budapesti Szabadkikötő Logisztikai Zrt. (FBL – Freeport of Budapest Logistics, hereinafter: FBL) is responsible for a profitable management of the port.

Duration of concessions

There are 2 ports in concession among respondents. One of the respondents (from Baja) is binding until 2027, while the other one, Freeport of Budapest is managed by FBL according to its contract with the port owner MAHART-Szabadkikötő Zrt for the upcoming 70 years.

Austria

In Austria, there are four ports situated on the Danube:

- Ennshafen port
- Port of Vienna
- Rhenus Donauhafen Krems
- Port of Linz (including the company port of voestalpine).

Figure 16: **Danube ports in Austria**

Source: National report – Austria

In total, 7.5 million tons of cargo were handled waterside in 2016 in Austrian Danube ports and transhipment sites. The most cargo in Austria was transhipped waterside in the port of Linz in 2016 – including cargo transhipped in the company port of voestalpine and in the port owned by Linz AG. Most cargo was transhipped in the company port of voestalpine in Linz (about 3.3 million tons), followed by other private ports and transhipment sites in Austria with a volume of 1.4 million tons (18.6% of total volume of goods handled in 2016). The port of Vienna accounted for 14.2% of total waterside transhipment in Austria with a volume of around 1.1 million tons. The Ennshafen port accounted for 8.0% of the total volume of goods handled (about 600,000 tons of cargo) and the port of Krems accounted for 6.2% (about 470,000 tons of cargo).[3]

In the survey, the focus was on Ennshafen port and the port of Vienna. This can be derived from the fact that these two ports are important trimodal hubs in Western and Eastern Austria, which facilitate transhipment of different types of cargo. The port of Vienna

[3] Source: National report – Austria

can be seen as an important logistics location for Eastern Austria since it is also the largest trimodal hub in Austria. For Western Austria, the Ennshafen port can be named as an important trimodal hub and the largest connected industrial area on the Upper Danube.[4] Even though, the most cargo was transhipped in the port of Linz waterside, the Ennshafen port and the port of Vienna were evaluated as important trimodal hubs in Austria and thus as relevant for the conducted survey.

Ennshafen port is one of two TEN-T-core ports (Rhine-Danube corridor waterway) in Austria and is located on river km 2112 in the mouth of river Enns to the Danube at the border between the federal states of Upper Austria and Lower Austria. The port in total is the largest connected industrial area on the Upper Danube. It is a combination of business park areas and port areas. The Ennshafen port offers optimal trimodal transportation logistics for export and connects the entire region with an international transportation network. Around 55 companies with about 2,300 employees are working in the business park of Ennshafen port. The port area is in total 352 ha thereof 110 ha are owned by the port authorities (Ennshafen OÖ GmbH und Ennshafen NÖ GmbH) and 242 ha are owned by other private companies. The cargo handling capacity at Ennshafen port is higher than 1 mio t/a (up to now no capacity limits has been reached). The port has 7 terminals, 16 berths, 2 basins and several kilometers of quay walls along the river side (Enns). The whole port area has 6 road entrances, each with double lines and two main rail entrances access the total area from two different sides. Within the area there is a wide system of internal rail network with many different users and owners (in total about 17 km rail tracks).

Concerning transhipped goods the main types of goods handled in the Ennshafen port are fertilizers, animal feed stuff, grains, agricultural products, wood, salt, ores, iron and steel, scrap metal, high and heavy pieces, waste materials, gas (LPG) and all kind of cargo in containers (content is confidential). [5]

In the non-private port sector, the port of Vienna can be named as the largest port on the Danube in Eastern Europe with a total area of 3.000.000 m^2 and 6 terminals in three cargo locations. The port of Vienna is located 2.000 km from the Black Sea and 1.500 km from the North Sea. It has the great advantage of being the largest trimodal logistics centre in Austria,

[4] Source: National report – Austria
[5] Source: National report – Austria

bringing together road, rail and waterway. This is making it the ideal location for the transhipment of goods and for container storage, trade and management. Even though only 1 million tons of cargo were transhipped waterside in the port of Vienna, in total 6.8 million tons of cargo were transhipped in the port of Vienna in 2016. This means that only around 10% of the total cargo transhipped at the port of Vienna was transhipped waterside, the rest belongs to land-to-land transhipment.

Wiener Hafen, GmbH & Co KG is a member of a public company Wien Holding which has 95% of ownership of Wiener Hafen, while the Vienna Economic Chamber (Wirtschaftskammer Wien) has a 5 percent share in the company. Wiener Hafen, GmbH & Co KG is the owner of the port facilities comprising real estate, buildings and wharf equipment and operates the harbours in Freudenau, Albern and Lobau, the number of berths in all three ports is up to 80.

The Port of Vienna is especially successful with the services container stuffing and stripping as well as with its car terminal.

Concerning Container Stuffing and Stripping the port of Vienna has a specialized team in this segment, which has been responsible for this area for about 10 years. 200 containers per year are stuffed in the port of Vienna. The most common goods, which are stuffed, are high quality industrial machinery, raw materials and cars.

Regarding the car terminal in 2016, the port of Vienna handled 72,000 vehicles. In 2017, the storage space was expended up to 10,000 parking lots. In addition, a covered storage area in the form of a parking garage is offered. [6]

[6] Source: National report – Austria

5 Research results

5.1. Research conducted on port owners/authorities – data obtained from the ports under survey

The synthetic situation of the completed questionnaires and the national non-response rate for port owners/authorities are presented in the table below:

Table 2: Number of questionnaires filled in by port owners/authorities and the rate of non-response

No.	Country	Number of questionnaires filled in	Number of contacted port owners/authorities/administrations	Rate of non-response
1.	Romania	6	6	0%
2.	Bulgaria	9	17	47%
3.	Croatia	1	1	0%
4.	Hungary	11	20	44%
5.	Austria	2	2	0%

Source: compiled based on the national reports

5.1.1 The cargo types handled

The analysis of the cargo types handled in the port under survey in the five countries considered showed a diversity of situations.

Romania

In Romania, from all the ports studied in this survey, the Port of Constanta is the only one that operates all types of cargo, as it shows in the table below. Due to the lack of adequate infrastructure development and the Danube navigation specificity (low water, ice, etc.), some types of cargo, such as containerized goods, are still not operated in some of the other ports.

Bulgaria

The highest percentage of positive responses were received for the groups: dry bulk cargo (22 %) and break bulk (19 %), followed by moisture resistant break bulk (16 %). Without a share in the cargo types handled are refined petroleum products, crude oil and dangerous goods. Cargo handling information is irrelevant for a total of 4 respondents –

authorities and terminal owners: MTITC – administrative structure; BPICo's Branch-Territorial Directorate Lom and Branch-Territorial Directorate Ruse; Executive Agency for Exploration and Maintenance of the Danube River.

Crude oil and petroleum products are handled at terminals, which are not included in the scope of the current study. Usually these are private regional ports.

Cargo types, which are handled in port terminals included in this study can be gathered to the following main groups:

- Agricultural products and live animals - maize, wheat, etc .;
- Solid mineral fuels - coal;
- Products of ferrous and non-ferrous metallurgy - hot-rolled steels, steel wire, etc.;
- Fertilizers;
- Break bulk – pallets, big-bags and others similar to them.

In its response Port terminal Svishtov, with a port operator Dredging fleet Istar, pointed out that the main cargo types handled are: dry bulk, break bulk and ro-ro cargo. The capacity of the terminal for cargo handling per year is 1 000 000 t.

Terminal Svishtov - Svilosa indicated that the main cargo types handled are: dry bulk, break bulk and containers. The capacity of the terminal for cargo handling per year is 200 000 t.

Port ADM Silistra is specialized in dry bulk cargo handling (grain). Grain trade is also the core business of the private company, which operates it.

The terminals within the area of BPICo Lom can handle dry bulk; break bulk; moisture resistant bulk; as well as general, metal and other cargoes. In this case the answers overlap with the operator's responses (Port Invest ltd in this case)

The terminals within the area of BPICo Ruse can handle: dry bulk, break bulk, containers, high and heavy cargo, liquid cargo, as well as ro-ro cargo. The processing capacity of listed cargo at the terminals per year is up to 8 million tons. Ruse – East, Ruse- West, Svishtov, Somovit and Tutrakan terminals and Ferry complex Nikopol can handle different cargo types. Port Ruse – Centre is mainly used for stay of ships and Ferry complex Silistra is currently not functioning. Again, the answers overlap with the operators' responses (for example Port Complex Ruse and others).

The experts from Port Complex Ruse J.S.Co. point out that terminals Ruse – East and Tutrakan can handle: dry bulk, containers, break bulk, high and heavy cargo, ro-ro cargo, liquid, moisture resistant bulk cargo and machinery and equipment. The capacity of the two terminals for cargo handling per year is respectively 2 500 000 t and 100 000 t.

According to the answers given by the concessionaire of the port of Lom about the types of cargo which it is able to handle, it is clear that it owns equipment for handling of dry bulk, break bulk, high and heavy cargo and moisture resistant bulk cargo. The capacity of the port is not mentioned in the response of the questionnaire.

Croatia

The biggest share of handled cargo in the port of Vukovar is dry bulk cargo such as fertilizers, coal, raw fuel coke and grains. For this port grain cargo is emphasized as another specific cargo type due to existence of specialized terminal that is handling only with grains.

The second mostly handled cargo type in Vukovar port is break bulk which follows as a part of dangerous goods - liquid bulk and petroleum products, while the least one handled is high and heavy cargo.

Most of break bulk transhipment are steel products, packed fertilizers and a little bit of building material, while high and heavy cargo considers as transhipment of various special constructions for industrial facilities.

In Vukovar Port there is no ro-ro ramp, but port provides transhipment of combine (harvester) with mobile crane and such operation in port statistic is considered as special type of cargo as part high and heavy cargo.

Austria

In transport economics, there are several different classifications of goods. These classifications are based on sectors and branches, the processing stage of the goods or their state of aggregation.[7]

[7]Source: National report – Austria

The port of Vienna handles 12 million tons of freight annually: 50 per cent by road, 35 per cent by rail, and 15 per cent by river.[8] The cargo types handled in the port of Vienna are dry bulk; container; break bulk; high and heavy cargo; petroleum products refined; RO-RO-cargo; liquid bulk; moisture, sensible, break bulk and crude oil. In 2016, 6,800,00 tons of commercial goods were transhipped in the port of Vienna. In addition, 1,100 vessels were handled. In the car terminal, 72,000 vehicles were handled and 440,000 TEU in the container terminal.[9]

In addition to the indicated types of cargo by port of Vienna, Ennshafen port also transhipps dangerous goods and gas -especially LPG and LNG. No liquid bulk and crude oil are handled in Ennshafen. In fact, 597,290 tons of cargo were transhipped waterside at Ennshafen port and around 306,000 TEU were handled.[10]

Hungary

All the ports included in the survey carry, load, and store or even handle dry bulk cargo. The infrastructure is settled everywhere for this service. This is the easiest type of product to deal with, although, difference and specifications still exist when comparing ports' facilities.

Break bulk cargo is carried in 73% of ports included in the survey. Less than half of ports responded handle heavy cargo, and not even 20% of them carry sensitive products. Very few ports, 2 out of 11 offer Ro-Ro services and only one carries petroleum products refined.

Liquid bulk cargo, crude oil, dangerous goods are not typical products handled in Hungarian Danube ports. There were no ports under the survey carrying out these types of cargo.

[8]Source: National report – Austria
[9] Source: National report – Austria
[10] Source: National report – Austria

Table 3: **Types of cargo handled in the Romanian, Bulgarian, Croatian, Hungarian and Austrian Danube ports**

Cargo type	ROMANIA						BULGARIA				CROATIA	HUNGARY	AUSTRIA	
	Constanța	Galați	Brăila	Tulcea	Giurgiu	Drobeta-Turnu Severin	Lom	Svishtov	Ruse	Silistra/ Tutrakan	Port of Vukovar	All ports under survey	Vienna	Ennshafen
1. Dry bulk	X	X	X	X	X	X	X	X	X	X	X	X(11)	X	X
2. Container	X				X			X	X			X(3)	X	X
3. Break Bulk	X	X	X	X	X	X	X	X	X		X	X(8)	X	X
4. High and heavy cargo	X	X	X	X			X		X		X	X(5)	X	X
5. Petroleum products refined	X	X	X	X	X	X					X	X(1)	X	X
6. RO-RO Cargo	X							X	X			X(2)	X	X
7. Liquid bulk	X	X	X	X					X		X		X	
8. Moisture, sensible, break bulk	X						X	X	X			X(2)	X	X
9. Crude oil	X												X	
10. Dangerous goods	X				X	X					X			X
11. Other (refrigerated, etc.)	X						**General – metals and others**		**Machinery and equipment; местодомуване and repair of vessels, etc.**		X			

Source: authors 'compilation based on national reports

Analysing each national report on the cargo types handled we concluded that, in the five countries under survey, the most common types of cargo handed are:

Table 4: The most common types of cargo handled

Country	Romania	Bulgaria	Croatia	Austria	Hungary
Cargo type handled	1. dry bulk 2. break bulk 3. petroleum	1. dry bulk 2. break bulk(moisture resistant break bulk) 3. container	1. dry bulk 2. break bulk	1. dry bulk 2. container 3. break bulk 4. high and heavy cargo	1.dry bulk 2. break bulk 3. high and heavy cargo

Source: authors 'compilation based on the national reports

As we can see, just two types of cargo are handled in all the ports under survey - dry and break bulk cargo. Regarding at all other types taken into consideration in the survey we observed important differences:

- The petroleum products refined cargo are handled in Romania, Croatia and Austria, but not in Bulgaria and Hungary;
- Crude oil cargo is handled just in Romania(just in the Port of Constanta) and in Austria(just in the port of Vienna)
- Dangerous goods can be handled in Romania(three ports), in Croatia(Vukovar) and Austria (Port of Enns)

5.1.2 Storage and warehousing facilities

Romania

In Romania, the largest part of the *port superstructure* is owned by port operators, but the Maritime Ports Administration still owns a number of buildings and platforms in its property that they rent out.

Bulgaria

MTITC has a role of port authority and has no direct responsibility for storage and warehousing facilities in ports. **BPICo** is owner of the open and closed storage and warehousing facilities in the **ports of national importance**. Operators and concessionaires, which responded to this question, use these facilities under a contract with MTITC. Private ports such as ADM Silistra are also the owners of the storage and warehousing facilities.

Of all the respondents, 5 stated availability of open warehouses and again 5 - presence of closed warehouses. Out of a total of 9 respondents, 56% own storage and warehousing facilities.

None of the respondents stated the availability of a dangerous goods warehouses. Such facilities are present at terminals, which do not fall in the scope of the respondents.

ADM Silistra owns silos and doesn't own open storages.

Port Tutrakan, which is operated by Port Complex Ruse J.S.Co. and Port Svishtov Sviloza (private) have only open storages. All other operators, which responded to the question, own open and closed storage and warehousing facilities.

Port Svishtov, which is concessioned until 2038, states that it owns 60 000 sq.m. open and 4 500 sq.m. closed storage area, which proves its ability to reach the maximal cargo handling capacity of the port for one year. In this case, the information provided by the concessionaire contradicts the officially published data. The official data says that the area of the storage and warehousing facilities is about 29 000 sq.m. The total area of the port is 81 917 sq.m. and it has 8 berths.

The total area of Port Svishtov – Sviloza, owned and operated by Port Svishtov West AD, is 15 882 sq.m. and it has 2 470 sq. m. open storage area.

ADM Bulgaria Logistics ltd. is owner and operator of Port ADM Silistra. The total area of the port is 21 000 sq.m. and it has 1 berth. The port has only closed storage facilities – silos.

As it was already mentioned, in Bulgaria there is no autonomous port authority. Currentlly BPICo, through its branches – territorial directorates, exercises lot of the functions and obligations that are typical for a European port authority. In the area of Branch-Territorial Directorate Lom there are 4 port terminals granted on a concession – Lom for 35 years, Oryahovo for 25 years, Vidin-North and Ferry Complex Vidin for 30 years.

In the territorial scope of BPICo's Branch-Territorial Directorate Lom there is a port granted for management according to §74, paragraph 3 of the MSIWPRBA[11] - Port Terminal Vidin - Center, as well as terminal operated by BPICo, because of terminated concession contract on 11.04.2016 – Port Terminal Vidin – South (currently MTITC is in procedure to sign a contract with a new concessionaire).

The total area of the above listed ports is 570 336 sq.m[12]. These terminals own open and closed storage and warehousing facilities.

In the area of BPICo's Branch-Territorial Directorate Ruse fall Port terminals of national importance, which are:

- Ruse – East – not concessioned;
- Ruse – West – not concessioned;
- Svishtov – under concession for 31 years since 2007;
- Somovit – under concession for 22 years since 2009;
- Tutrakan – not concessioned;
- Ferryboat Complex Nikopol – under concession for 35 years since 2013.

The total area of the above listed port terminals is 131.2 ha. They have open and closed storage and warehousing facilities sufficient to store the volume of goods that are intended for indirect processing.

The Port Complex Ruse J.S.Co. operates four terminals – Ruse – East, Ruse – Center, Tutrakan and passenger terminal Silistra. The total area of port terminal Ruse – East is

[11] National report – Bulgaria: Contracts between MTITC and port operators with state ownership for the provision of port services.
[12] National report – Bulgaria: BPICo carries out port services in the event that a port operator contract has been terminated earlier. In this case, the BPICo. shall provide port services in the relevant port until the conclusion of a new contract in accordance with the law.

825 533 sq.m. and the area of port terminal Tutrakan is 4414 sq.m. In total, the two terminals have 15 freight berths. The freight terminals, operated by Port Complex Ruse J.S.Co. have open and closed storage and warehousing facilities sufficient to serve the entire cargo flow that passes through them.

According to the answer given by the experts in Executive Agency for Exploration and Maintenance of the Danube River, it is clear that their special purpose port has open and closed storage area. The port is specialized for stay and repair of vessels, mooring, supply of water and electricity, hydro technical research and construction.

Port terminal Lom, operated by Port Invest ltd., is under concession for 35 years. The total area of the port is 371 129 sq.m. and it has 13 berths. The port has rail and road connection with the hinterland. The port has open and closed storage and warehousing facilities.

The **Ruse-East has the largest territory** and the largest storage area. Port of Lom is the second largest port. All ports in the area of Lom have open storage area in the amount of 216 000 sq.m. Closed storage area is a little more than 12 000 sq.m. without the volume of the tanks. For the territorial scope of Ruse the open storage area is 350 000 sq.m., the closed storage area is more than 34 000 sq.m. without the silos and tanks.

Croatia

Storage and warehousing type's availability are presented in table below. The open storage is mostly used for dry, break and high and heavy cargo, while covered storage is used for break cargo sensitive to weather conditions. Storage for dangerous goods is in the tanks for liquid cargo such are diesel fuel, gasoline and natural gas derivate with total capacity of 12.000 m^3. Nevertheless, storage of diesel fuel is possible on the floating facility (barges) at the bunkering terminal with capacity of approximately of 2.000 tons. Storage of grains on specialized terminal for grains is possible in silos with capacity of 60.000 tons.

As almost all land within the port area is owned by Republic of Croatia and managed by the Port Authority Vukovar storage facilities are considered as property of the State. However, this fact is applicable on only on the open and covered storages, while dangerous storages are part of private investment of the concessionaires. After the concession contract expires, Port Authority is obligated to pay off current value of the storages to the port operator

or in the tender for granting of concession express current value of the storages that potential new concessioner has to pay for.

The silos for grains is still an open issue that has to be solved due to the fact that silos are located on the private land in the port area. Nevertheless, according to the Act on the Inland Navigation and Inland Ports Republic of Croatia ("Official Gazette" 109/07, 132/07, 51/13, 152/14) has the right to be first one to buy a land in the port area.

Austria

The storage and warehousing facilities available in the port of Vienna - as indicated in the survey - are an open storage area and a covered storage area; both are in the property of the port authority/owner.

In fact, the covered storage area includes 70,000 square meters and is ideally located between the A23 Südosttangente city motorway and the A4 Ostautobahn motorway. In addition, the port of Vienna is located near the centre of Vienna and the Vienna International Airport in Schwechat. Furthermore, a covered crane installation enables cargo to be transferred from vessels to the warehouse. All storage areas have covered rail connections as well and area ideally equipped to handle heavy and bulky goods. The warehousing services in the port of Vienna include:

- High-rack storage
- Block storage
- Cold stores and deep freeze storage
- Cross docking
- Order picking
- Packing
- Loading / unloading of containers
- Stuffing / stripping
- Customs clearance, transports
- Other services on request

In the Ennshafen port there are four types of storage and warehousing facilities available. These four types include an open storage area, a covered storage area, a storage of dangerous cargo and a fueling storage (LNG) and bunkering storage (gasoline station). All four

mentioned areas are in the property of the port operator, only the open storage is also in the property of the port authority/owner[13].

Hungary

In Hungary, 8 out of 11 ports considered in the survey have open storage and 9 out of 11 have covered storage facilities. Deviation on the other hand is quite huge in terms of size: from 1000 square meters to 160 000 m^2 in case of open air and 1200 to 100 000 in case of covered warehousing. Dangerous goods can be stored in two ports among those who responded, and they have 1600 and 5000 m^2 for that.

Even though, questionnaire asked to define storage capacities in square meter, couple of respondents answered also or only in cubic meters or tons since their silos or facilities could be easier and more relevant to be defined in that way. Hence, to have a big picture we can notice that the smallest and biggest silo capacities in Hungarian ports are operated by Blóker Zrt. in Bogyiszló, and ÁTI DEPO Zrt. in Baja.

[13] Source: National report – Austria

Table 5: Availability of warehousing facilities in Romanian, Bulgarian, Croatian, Hungarian and Austrian Danube ports

Facility type		*Open storage area*	*Covered storage area*	*Storage of dangerous cargo*	*Other (passengers' terminal)*
ROMANIA					
Constanța	*port administration*	✓			✓
	port operator	✓	✓	✓	
Galați	*port administration*				✓
	port operator	✓	✓		
Brăila	*port administration*				
	port operator	✓	✓		
Tulcea	*port administration*				
	port operator	✓	✓		
Giurgiu	*port administration*				

	port operator	✓	✓	✓	
Drobeta-Turnu Severin	*port administration*				
	port operator	✓	✓	✓	
BULGARIA					
BPICo Branch-Territorial Directorate Lom – total for the ports of national importnace		✓			
Port Invest ltd. (terminal Lom)		✓	✓	✓	
Vidin - South		✓	✓		
*Oryahovo **		✓	✓	✓	
*Vidin - North**		✓	✓	✓	
Ports of regional importance!					
Ferry Complex Oryahovo		✓	✓		
DDF Dunim Kozloduy		*n/a*	✓		
Ekopetroleum Vidin (Taifun)		*n/a*		✓	
*Ro-Ro SOMAT Vidin**		*n/a*	✓		
*Free Zone Vidin**		*n/a*		✓	
*DDF Badin Vidin**		*n/a*	✓		
BPICo Branch-Territorial Directorate Ruse – total for the ports of national importnace		✓			

DF Istar AD (Svishtov) difference between response to questionnaire and official data	✓	✓ 73 220	✓	
Port Complex Ruse (Ruse-East)	✓	✓	✓	
*BPICo (Ruse-West)**	✓	✓	✓	
Port Complex Ruse (Tutrakan)	✓	✓		
*Somovit **	✓	✓	✓	
Ports of regional importance!				
Svishtov Sviloza	✓	✓		
Executive Agency for Exploration and Maintenance of the Danube River	✓	n/a		
ADM Silistra	✓		✓	
*Silistra Polaris**	*n/a*	✓		
*Silistra Lesil**	*n/a*	✓		
*Oil terminal Arbis**	*n/a*		✓	
*Port Bulmarket**	✓	✓	✓	
*Free Zone Ruse**	✓	✓	✓	
*WQ**	*n/a*	✓		
*Danube dredging fleet Ruse**	*n/a*	✓		

*TPP Sviloza**		*n/a*	✓		
*Belene**		*n/a*	✓		
		CROATIA			
Port of Vukovar	*port administration*	✓	✓	✓	
	port operator				✓
		HUNGARY			
All ports under survey(11)	*Unspecified*	✓(8)	✓(9)	✓(2)	
		AUSTRIA			
Port of Vienna	*port administration*	✓	✓		
	port operator				
Port of Enns	*port administration*	✓			
	port operator	✓	✓	✓	

Source : compiled based on national reports

5.1.3 Handling facilities and devices available

Romania

In Romania, the ownership of the port equipment is the property of port operators, but there is an exception for the Constanta South Container Terminal (CSCT), where the port operator rented two cranes for container handling from the Maritime Ports Administration.

Bulgaria

The responses to the question about the available handling facilities and devices can be summarized as follows:

Port terminal Svishtov owns one Ro-Ro ramp, 11 gantry cranes and one floating crane. The terminal has 8 berths and is able to transfer the cargo to rail or road transport.

Port terminal Svishtov Sviloza owns one 10 t gantry crane. It also has 1 berth and is able to transfer the cargo to rail or road transport

Ports, managed by BPICo Branch-Territorial Directorate Ruse, are equipped with conveyor belts /property of the heating plant in Ruse/; pneumatic equipment; ro-ro ramps; luffing/slewing crane and floating crane.

The port, which is owned and operated by Executive Agency for Exploration and Maintenance of the Danube River is a port with special status at 491 km in the Bulgarian section of the Danube. The total area of the port is 21 633 sq.m. and it has 4 berths. The port is not used for cargo handling and passenger services. It has no rail or road connection to the hinterland. In order to carry out its main activities, the port is equipped with one 3.2 t stationary electrohydraulic crane, one 2 t stationary crane and one electric telfer.

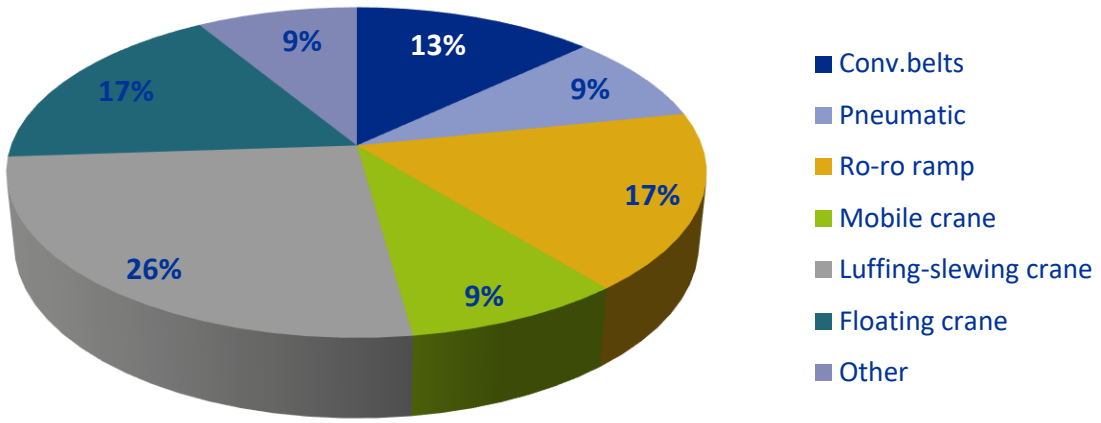
Port Complex Ruse J.S.Co. states that the terminals, which it operates, are equipped with the following handling facilities and devices: conveyor belts, pneumatic equipment, luffing/slewing cranes and a floating crane. The terminals have 37 berths and have rail and road connection to the hinterland.

Port terminal Lom has the following handling facilities and devices: gantry crane, mobile crane and other devices, owned by the port operator. Port ADM Silistra owns only conveyor belts. There is only road connection to the hinterland.

The handling facilities and devices that are present at the terminals, which fall in the area of BPICo Branch-Territorial Directorate Lom are: ro-ro ramp, gantry crane, floating and mobile crane, vehicle weighing scales. There is rail and road access to the terminals from the hinterland.

The table shows that with regard to handling facilities, most of the positive responses are received for ro-ro ramps, gantry cranes and floating cranes (4 answers each). Having in mind the characteristics of the cranes in the ports along the Bulgarian section of the Danube, all cranes can be classified as luffing/slewing cranes. In this sense the responses can be summarized as 4+2=6. This is in compliance with the official data, which state that the cranes are the main equipment of the river ports in Bulgaria.

Table 6: Distribution by type of equipment in Bulgaria



Source: National report – Bulgaria

Croatia

As shown in table below, the Port of Vukovar has luffing/slewing and mobile crane and pneumatic equipment. Pneumatic equipment is used on liquid terminal for transhipment of liquid cargo, as well as for bunkering. Nevertheless, pneumatic equipment is also used on specialized terminal for transhipment of grains from vessel to storage, as well as from storage to vessel.

Only one operator in the port at bulk, general, multipurpose and palletized terminal, uses Cranes. There are three luffing/slewing cranes with lower capacity and they are mostly used for unloading and loading bulk cargo, while mobile crane has a bigger capacity and is used at terminal for general cargo as well as on the multipurpose terminal.

Austria

There are numerous handling facilities and devices used in the considered ports in Austria.

In the port of Vienna the following handling facilities are available as indicated in the questionnaire:

- conveyor belt
- pneumatic equipment
- Ro/Ro ramp (Roll-on Roll-off),
- gantry crane
- mobile crane
- luffing/slewing crane

There are the same handling facilities in the Ennshafen port as in the port of Vienna, in addition there is also a floating crane, a crane mounted on a barge or pontoon which can be towed or self-propelled from place to place, available. All the mentioned handling facilities available in the Ennshafen port are in the property of the port operators except the Ro/Ro ramp which is in the property of the port authority/owner

Hungary

In Hungary, most of the equipment considered in this survey, related to handling and loading services, belong to port operators in Hungary.

***Table 7*: Handling facilities available in the Romanian, Bulgarian, Croatian, and Hungarian Danube ports**

Handling equipment / facility									Conveyor belt	Pneumat equipme
Romania										
Constanța	*port administration*				✓					
	port operator	✓	✓	✓	✓	✓	✓	✓		
Galați	*port administration*									
	port operator	✓	✓	✓	✓	✓	✓	✓		
Brăila	*port administration*									
	port operator	✓	✓	✓	✓	✓	✓	✓		
Tulcea	*port administration*									
	port operator	✓	✓	✓	✓	✓	✓	✓		
Giurgiu	*port administration*									
	port operator	✓			✓	✓	✓			
Drobeta-Turnu Severin	*port administration*									

	port operator	✓			✓		✓		
Bulgaria									
All ports under survey	unspecified	3	2	4	*4*	2	2 **(6)**	4	2
Croatia – Port of Vukovar									
Property of port authority/ owner		✓							
Property of the port operator		✓	✓			✓	✓		
Hungary									
Property of port authority/ owner (all ports under survey)		✓(10%)	✓(10%)	✓					✓(Tugboat 50%)
Property of the port operator (all ports under survey)		✓(90%	✓(90%		✓	✓	✓	✓	✓(Tugboat(50%)

Source: compiled based on the national reports

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5.1.4 Quality certification

Romania

As was presented before, in Romania there are three port administrations managing all maritime and inland water ports, except for the four small ports (Murfatlar, Medgidia, Ovidiu, Luminita) situated on Danube-Black Sea Canal where the Administration of the Navigable Canals has the role of a port administration.

There is no legal requirement related to the implementation of a quality management system in the Romanian port administrations. But the reform done during the integration of Romania in the European Union included in most cases an implementation of such a system in relevant public organizations.

All three port administrations studied for this report decided to implement an integrated management system based on two or three standards for management systems:

The Maritime Ports Administration Constanța is certified according to ISO 9001 (quality management system), ISO 14001 (environment management system) and OHSAS 18001 (occupational and health management system).

The Maritime Danube Ports Administration Galați is certified according to ISO 9001 (quality management system), ISO 14001 (environment management system) applicable for the ports of Galati, Braila and Tulcea.

The River Danube Ports Administration Giurgiu is certified according to ISO 9001 (quality management system), ISO 14001 (environment management system) applicable for the ports of Giurgiu and Drobeta-Turnu Severin.

Due to market requirements, as well as the practice in the port industry, a large number of port users operate a certified quality management system.

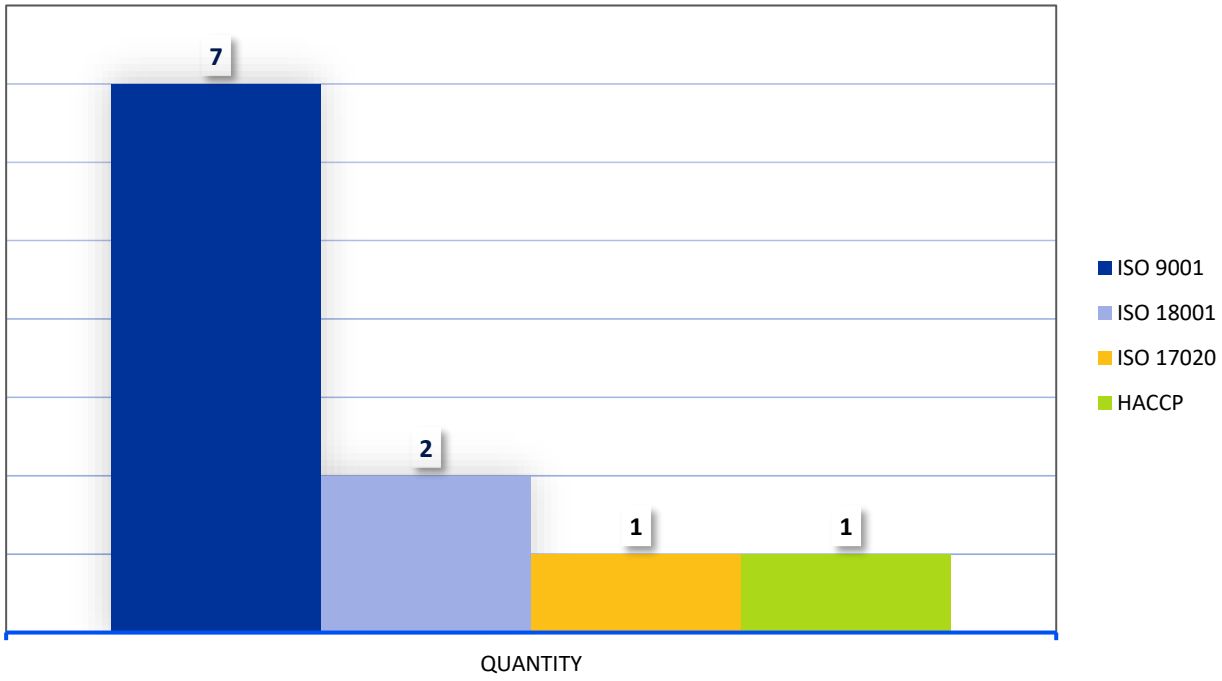
The legal requirement to operate a quality management system is applicable to the Naval Authority and maritime training providers only, due to the implementation of the *Convention* on Standards of Training, Certification and Watchkeeping for Seafarers.

Bulgaria

The answers of the respondents show that every one of them has quality certificate. The only respondent that does not own a certificate is the MTITC, but this is a consequence of its status as a ministry.

It should be noted, that according to the Bulgarian legislation and in particular Ordinance No 9 of 17 October 2013 on requirements for operational suitability of ports and specialized port facilities, art. 40. (1) *Operators* providing *port services under Art. 116, para. 2, item 2 and / or 3 of the MSIWPRBA must implement a certified quality management system according to EN ISO 9001: 2008 or equivalent.*

Figure 17 Quality certificates for Bulgarian ports



Source: National report – Bulgaria

Port terminals Svishtov, Svishtov – Sviloza as well as the special-purpose port terminal of the EAEMDR own quality certificates as per the requirements of ISO 9001:2008.

Port ADM Silistra owns quality certificate ISO 9001:2015.

BPICo Branch-Territorial Directorate Lom owns the following certificates: OHSAS 18001-2007 and ISO 9001: 2015.

BPICo Branch-Territorial Directorates Ruse and Lom own the following certificates: OHSAS 18001-2007 and ISO 9001: 2015.

Port Complex Ruse J.S.Co. owns the following certificates: ISO 9001; ISO 17020; HACCP - Hazard Analysis & Critical Control Points.

Port terminal Lom owns the following certificates: ISO 9001/14001 and OHSAS 18001.

Croatia

Port Authority Vukovar, as administrator of the Port of Vukovar, is a holder of quality certificates: ISO 9001 and ISO 14001. Audit is obtained once a year by authorized organization and recertification is obligational every three years. Annual audit covers the scope of certification related to administration and management of port and wharfs located on the Croatian part of Danube River, executing granted concessions control, port services supervision as well as charging and port dues defining. Audits also cover environmental demands fulfilling by the Port Authority and concessionaires.

Table 8: List of quality certificates held by Port Authority Vukovar

№	Type of quality certificate	Yes/No
1.	ISO 9001	Yes
2.	ISO 14001 /other than 9001/	Yes
2.	HACCP	No
3.	OTHER	No

Source: National report – Croatia

Furthermore, the Port Authority Vukovar employs qualified staff for implementation of quality standards in the port, which are trained through courses and seminars by authorized organization. Port operators do not hold afore mentioned certificates, but they need to have certain level of quality and environmental protection standards and they are controlled by the Port Authority.

Austria

The port of Vienna has gained two types of quality certification: ISO 9001 and GMP+.

- ISO 9001 is one of the standards developed by the International Organization for Standardization (ISO). The purpose is to increase customer satisfaction through the deliverance of quality products and services. [14]
- "GMP stands for Good Manufacturing Practices. In 1992 the current GMP+ Feed Certification scheme started out with this. Afterwards, it developed into a full-fledged certification scheme by integrating ISO quality management requirements, HACCP and other elements. The + stands for the integration of HACCP: 'Hazards Analysis and Critical Control Points'. The foundation of the GMP+ systematic is partly determined by continuous improvement according to the principle of the Deming circle 'Plan, Do, Check, Act': write down what I'm doing, do what I've written down and providing proof that I effectively did it."[15]

The Ennshafen port indicated that no quality certification is awarded in the port.

Hungary

In 60% of cases, quality certification is obligatory, at 40% of ports it is not mandatory to have a quality certification. Most common certificates ports awarded are ISO (70% of ports) and HACCP (40% of ports). There are GMP holders (27%), one ISCC awarded port, and one among the respondents saying they have none. There are 3 out of 11 port administrative bodies having more than 1 type of quality certificate. One respondent has HACCP, GMP+, ISCC, ISO 14001, ISO 9001 and ISO 22000 too.

[14]Source: National report – Austria
[15]Source: National report – Austria

5.1.5 Port administrative processes conducted

Romania

According to *Ordinance no. 22 adopted on 29th January 1999 on ports administration and port services*, the port and/or waterway administrations are organizations responsible for the implementation of port policies and of port and waterway infrastructure development programs issued by the Ministry of Transport, as well as the available functionality of ports and waterborne transport infrastructure, the management thereof and the monitoring or provision of safety services and the provision of ancillary activities.

The port and/or waterway administration have mainly the following duties and obligations:

a) to ensure the repair, maintenance and up keeping of the minimum technical characteristics of the waterborne transport infrastructure that has been conceded or entrusted to them for administration purposes;

b) to provide the users with the waterborne transport infrastructure referred to under a) on a non-discriminatory basis, in accordance with the regulations in force;

c) to monitor or ensure the permanent provision of security services;

d) to keep a record of port workers carrying out ship loading / unloading, storage, stowage, packing, goods palletizing, ship cleaning and similar activities;

e) to ensure coastal and floating signalling, as well as minimum depths in ports and waterways;

f) to ensure open sea signalling in the port area, for which they can charge rates.

Table 9 shows the port administrative processes as they are operated by port administrations.

Bulgaria

With regard to the administrative processes that can be performed, the experts in Port terminal Svishtov point out renting of land, port platforms, office spaces, warehouses, equipment as available in their terminal.

The administrative processes that can be performed at port Svishtov – Sviloza are construction, maintaining & repairing of port infrastructure; preparation and implementation

of security plans; issuing specific authorizations, licenses, certificates related to port activities and security control.

Port ADM Silistra performs the following administrative processes: construction, maintaining & repairing of port infrastructure; preparation and implementation of security plans and ship cargo control.

The activities that are performed by BPICo Branch-Territorial Directorate Lom are: construction, maintaining & repairing of port infrastructure; renting of land, port platforms, office spaces, warehouses, equipment; monitoring of vessels' movements and information systems; port and other dues collecting; provision of port services to port operators by the GIS system of BPICo.

The activities that are performed by BPICo Branch-Territorial Directorate Ruse are: construction, maintaining & repairing of port infrastructure; renting of land, port platforms, office spaces, warehouses, equipment; monitoring of the vessels' movement through the BULRIS information system.

MTITC does not perform directly port administrative processes, but observes agencies and companies in its structure for the proper implementation of the administrative processes. In this regard, the Ministry has responded positively to all the parts of this question, specifying that these processes are carried out by the administrations in its structure.

Executive Agency for Exploration and Maintenance of the Danube River did not respond to this question.

Port Complex Ruse J.S.Co. performs preparation and implementation of security plans.

In Port terminal Lom are performed the following processes: construction, maintaining & repairing of port infrastructure and preparation and implementation of security plans.

The following table represents the distribution of the answers according to the number of positive and negative responses for every administrative process.

Croatia

Administrative processes performed by the Port Authority are listed in table above. According to the Croatian legislation, Act on Inland Navigation and Inland Ports administering the Public port implies following tasks:

- Supervision and recording of arrivals and departures of vessels, transhipment and transport;
- Ensuring continuity of providing port activities;
- Reception of water, faecal, bilge and oily waters from vessels;
- Enforcing order in port and supervision over carrying out the port activities;
- Regular maintenance of port facilities, except port facilities whose maintenance is the concessionaires' responsibility;
- Management of public water domain in the port area.

Austria

During the survey, the port of Vienna indicated that the following administrative processes are performed by their organization:

- Construction, maintaining & repairing of port infrastructure
- Renting (land, port platforms, office spaces, warehouses, equipment)
- Preparation and implementation of security plans
- Ship cargo control and
- Issuing specific authorizations, licenses, certificates related to port activities

The Ennshafen port performs the same five administrative processes as the port of Vienna, additional the Ennshafen port is also responsible for:

- Monitoring ship movements and information systems
- Traffic management in general
- Traffic management for rivers
- Traffic management for road and
- Issuing specific authorizations, licenses, certificates related to port activities.

Hungary

Most of the port administrative bodies are responsible for providing basic infrastructural and administrative background to their port operators. 91% of port owners/authorities manage *construction, maintaining and repairing of port infrastructure*.

Second most common activity is *renting land, port platforms, office spaces, warehouses and equipment*. There are two port authorities managing 5-5 activities among ports under the survey.

36% of ports are responsible for the *preparation and implementation of security plans*. 27% of port authorities coordinate *river-rail-road traffic management*.

18% of port authorities operate *information systems for ship movement monitoring*, other 2 ports maintain *security control* and one issues *specific authorizations, licenses, certificates related to port activities*

Table 9: Port administrative processes conducted

Process/Port	Construction, maintaining & repairing of port infrastructure	Renting (land, port platforms, office spaces, warehouses, equipment)	Preparation and implementation of security plans	Ship cargo control	Monitoring ship movements and information systems	Traffic management			Issuing specific authorizations, licenses, certificates related to port activities	Other (keeping records of port workers, elaborating port regulations)
						River	Road	Rail		
					Romania					
Constanța	✓	✓			✓	✓			✓	✓
Galați	✓	✓			✓	✓			✓	✓
Brăila	✓	✓			✓	✓			✓	✓
Tulcea	✓	✓			✓	✓			✓	✓
Giurgiu	✓	✓			✓	✓			✓	✓
Drobeta-Turnu Severin	✓	✓			✓	✓			✓	✓

Bulgaria											
Yes	6	4	5	2	3	2	1	1	1	3	
No	2	4	3	6	5	6	7	7	7	5	
Croatia											
Port of Vukovar	✓	✓			✓						
Hungary											
% of cases if performed by respondent s	91%	64%	36%	18%	18%			27%		9%	18%
Austria											
Port of Vienna	✓	✓	✓	✓						✓	
Port of Enns	✓	✓	✓	✓	✓	✓	✓			✓	

Source: compiled based on the national reports

5.1.6. The services provided by the responding organizations in accordance with the existing facilities

Romania

Table below shows the services provided by responding organizations in Romania in accordance with existing facilities in the ports included in the survey. Those which are not provided by port administration are provided by private port users.

Table 10: **Services provided by port administration in Romanian Danube ports**

Transport type	*Constanța*	*Galați*	*Brăila*	*Tulcea*	*Giurgiu*	*Drobeta-Turnu Severin*
Administrative and control services	✓	✓	✓	✓	✓	✓
Transshipment operations						
Storage of cargo						
Berth allocation and port acceptance	✓	✓	✓	✓	✓	✓
Fresh water supply	✓	✓	✓	✓	✓	✓
Onshore power supply	✓	✓	✓	✓	✓	✓
Bilge water disposal	✓	✓	✓	✓	✓	✓
Waste disposal	✓	✓	✓	✓	✓	✓
Waste recycling	✓	✓	✓	✓	✓	✓
Fuel station for vessels					✓	
Provision of logistic services						

Source: National report – Romania

Bulgaria

Regarding the services provided by the respondents, most of them state that they can supply electricity and water to vessels. In addition, they provide the following information:

Except water and electricity shore supply, the main services provided by Port Svishtov are pilotage, transhipment, loading and offloading, cargo storage, forwarding services, etc. (National report - Bulgaria).

Port Svishtov – Sviloza performs also waste reception activities. It is mainly used for the handling and storage of coal used by the Thermal Power Plant. (National report – Bulgaria)

Port ADM Silistra provides the following services: transhipment; loading and unloading; cargo storage in closed storage facilities. The port is also specialized in reception of ship generated waste.

BPICo Branch-Territorial Directorate Lom doesn't provide services with regard to the handling facilities. The functions of the branch of BPICo. are described in detail in the introduction part of this report.

BPICo Branch-Territorial Directorate Ruse provides administrative and control services.

Port Complex Ruse J.S.Co. pointed out that it provides services relevant to the handling facilities available in the sphere of loading and unloading; berth allocation and port acceptance; cargo storage in open and covered warehouses. The terminals, operated by Port Complex Ruse J.S.Co., provide electricity and water supply, bunkering and logistic services as well.

Port terminal Lom is capable of providing services including loading and unloading; berth allocation and port acceptance. The port has ability to storage cargo, passing through the port and destined for the hinterland in the country. Water and electricity supply are also within the scope of its services.

Executive Agency for Exploration and Maintenance of the Danube River states that provides the following services: supply of electricity and water to vessels; bunkering; bilge water disposal.

MTITC did not give any information on this question.

Croatia

No answer was provided.

Austria

No answer was provided.

Hungary

There were no port authorities among the respondents dealing with administrative and controlling services exclusively. Fresh water is supplied by 81%, onshore power is supplied by 72% of port authorities/owners. Bilge water disposal is provided by 27%, fuel stations for

vessels are available at 18% of the ports. Waste disposal is possible at 2 ports while recycling is not possible anywhere among the respondents.

5.1.7 Participation in any consortium/association at national or international level

Romania

The Maritime Ports Administration Constanța is a member of:

- *ESPO - European Sea Ports Organization*
- *BASPA – Black and Azov Sea Ports Association*
- *BSEC – Organization of The Black Sea Economic Cooperation*
- *MedCruise – The Association of Mediterranean Cruise Ports*

MPAC has signed cooperation protocols with the following ports:

1. *Port of Aktau*, Kazakhstan Republic;
2. *Association of Logistic Centers from Hungary*;
3. *MierkaDonauhafenKrems*, Austria;
4. *Port of Lattakia*, Syria;
5. *Durres Port Authority*, Albania;
6. *U.N. Ro-Ro Pendik Port*, Turkey;
7. *Port of Rotterdam Authority*, The Netherlands;
8. *State Service of Maritime and River Transportation*, Turkmenistan;
9. *Port of Jebel Ali*, United Arab Emirates;
10. *Batumi Seaport Ltd.*, Georgia;
11. *Poti Seaport Corporation - APM Terminals Poti*, Georgia;
12. *Hungarian Danube Ports Federation* and the *Hungarian National Shipping Federation*;
13. *Port "Danube" Pančevo,* Serbia;
14. *Baja Public Port Ltd.*, Hungary;
15. *DOE Europe SE*, Czech Republic;
16. *Port of Vukovard.o.o.*, Croatia;
17. *Port of Augusta*, Italy;
18. *Port of Baku*, Azerbaijan.

The Maritime Danube Ports Administration Galați is a member of:

- *ESPO - European Sea Ports Organization*

- *EFIP – European Federation of Inland Ports*
- *UPIR – Uniunea Porturilor Interioare Românești (Romanian Inland Ports Union)*

The River Danube Ports Administration Giurgiu is a member of:

- *EFIP – European Federation of Inland Ports*

The membership to these organizations ensures the port administration a large contribution for a better organization and service provision, including:

a. Unification of documents flow;

b. Exchange of information in a legal framework of port processes between members;

c. Rising the qualification level of the administrative personnel;

d. Attraction of investments for the administered ports;

e. Others (exchange of good practices, etc.).

Bulgaria

Most of the respondents (78%) pointed out that the ports and their port operators do not participate in any consortium/association at national or international level.

Both BPICo Branch-Territorial Directorates – Ruse and Lom are not part of any consortium/association at national or international level as separate units. On the other hand BPICo participates in EFIP, ESPO and IAPH. Through its membership in such organizations, the company has the opportunity to exchange information on port law with the other members.

Port Complex Ruse J.S.Co.states that it participates in EFIP and in Bulgarian River Cluster "Danube". Through its membership in such organizations, the company has the opportunity to exchange information on port law with the other members.

Croatia

Public Institution Port Authority Vukovar is a member of:

- At the national level – ZALU – Association of Inland Port Authorities
- At the international level – EFIP – European Federation of Inland Ports.

The membership in these organizations ensures for the port administration a large contribution for a better organization and service provision, including:

- Unification of documents;

- Exchange of information of a legal framework of port processes between members;
- Rising the quality level of the administrative personnel;
- Attraction of investments for the administered ports, information and accessibility to EU funds;
- Others (exchange of good practices, etc.).

Furthermore, Association of Inland Port Authorities is established to perform the following tasks:

- Harmonization of ports dues and other port fees;
- Harmonization of port fees for usage of infrastructure and superstructure;
- Harmonization of development terms and programs for public ports;
- Harmonization of procedures related to granting concessions for providing port services;
- Harmonization of all issues related to the functioning of the port system;
- Cooperation with Croatian Railways, ship-owners, port agents, forwarders and other participants closely connected with inland waterways;

Ensuring permanent cooperation with Agency for Waterways, Association of Maritime Port Authorities etc.

Austria

The port of Vienna and the Ennshafenport are both part of the consortium/association IGÖD. IGÖD is a member of the European Federation of Inland Ports (EFIP). One of the key objectives of IGÖD is to further strengthening the Danube activities. IGÖD carries out the following basic tasks:

- Furthering and lobbying for common interests in transport, waterways and seaports
- Establishing contact and working together with foreign and international associations with the same interests
- Enhancing the public's knowledge of and improving its attitude towards the use of the Danube for the transportation of goods

- Exchange of opinions and information between members[16]

In addition, the Ennshafen port is also a member of EFIP,PDA/PDI and the chamber of commerce. EFIP stands for "European Federation of Inland Ports" and highlights and promotes the role of inland ports as nodal points for intermodal transport, combining road, rail, maritime and inland waterway transport.[17]

The membership within this mentioned associations enables a unification of the document flow, an exchange of information on legal frame of port processes between other members and provides a general knowledge-transfer. Furthermore, the membership leads to an attraction of investments for administered ports. Both ports take serious efforts to further strengthen the position of ports as important logistics hubs in the European transport network and work together with national/international consortium/associations.

Hungary

In Hungary, 18% of respondents are not members of any consortium or association. On the other hand, for those which are, the most important umbrella institutions named in the survey are HFIP and MLSZKSZ (27-27%). The latter is the Hungarian Federation of Logistic Service Centers including cargo transporter companies on air, rail, road and water and depos. One respondent mentioned the Hungarian Association of Logistics Service Providers (MLE). Besides such institutions, industrial parks within/next to the port area are also important for the port management. The questionnaire was completed also by a subsidiary of an international company. Exchange of information on legal frame of port processes helps for most members of any association. Respondents agreed that exchange of information is a great advantage of being in a consortium and it clearly has added value.

Excluding the Bulgarian ports, where 78% are not part of some consortia/ associations, in the other countries, the ports that were part of the sample are represented in such organizations. The benefits of the representation in such structures materialize in activities that harmonize port taxes, the level of use of port infrastructure/ superstructure, the

[16]Source: National report – Austria
[17] Source: National report – Austria

procedures and port services, and expand the cooperation in other organizations, the information exchange between members, etc.

5.1.8 The complexity of the administrative port processes

Romania

The port administrations included in the survey were invited to appreciate on a scale from 1 to 5 (1- the lowest level, 5 – the highest level) the complexity of the administrative port processes, referring to the correlation between volume of documents required, number of personnel involved and time required to fulfil them.

Table 11: **Complexity of processes in Romanian Danube ports**

Process		*Constanța*	*Galați*	*Brăila*	*Tulcea*	*Giurgiu*	*Drobeta-Turnu Severin*
Construction, maintaining & repairing of port infrastructure		4	3	3	3	4	4
Renting (land, port platforms, office spaces, warehouses, equipment)		3	3	3	3	3	3
Preparation and implementation of security plans							
Ship cargo control							
Monitoring ship movements and information systems		1	3	3	3	2	2
Traffic management	River	1	3	3	3	2	2
	Road						
	Rail						
Issuing specific authorizations, licenses, certificates related to port activities		1	2	2	2	2	2
Transshipment							
Storage							

Waste recycling and disposal	4	4	4	4	2	2
Other (elaborating port regulations)	5	5	5	5	5	5

Source: National report – Romania

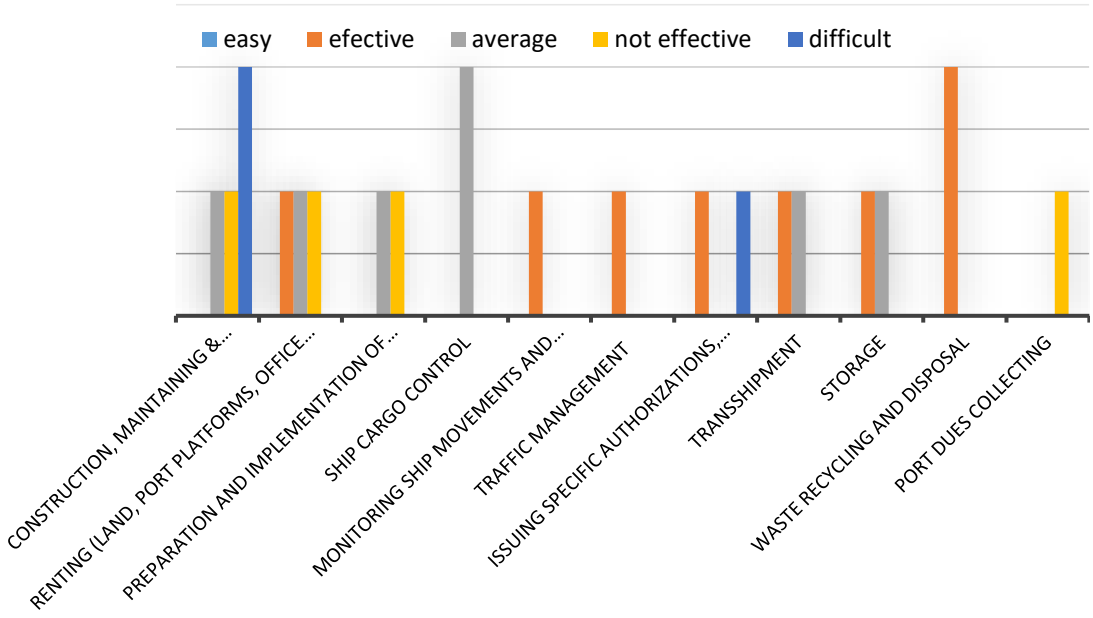
The port administrations in Romania issue work permits and work licenses for the port users performing activities in the port area. These permits or licenses are necessary in order to obtain from the Romanian Naval Authority the authorization to perform their activity.

The authorization is valid for 5 years, subject to annual confirmation. There are no audits performed by authorities in relation with this authorization, but the Naval Authority organizes random inspections to assure the compliance with the applicable legislation.

Bulgaria

The assessment of the complexity of the administrative processes is listed below, relating to the ratio between the volume of the requested documentation, the number of staff involved and the time required for their execution, the responses received by the participants can summarized as follows:

Figure 18: Complexity of the administrative port processes in Bulgaria



Source: National report – Bulgaria

Port ADM Silistra gives **average** assessment to five of the administrative processes. For points 2, 5, 6, 7, 10 and 11, the respondent considers not relevant to its activity.

BPICo Branch-Territorial Directorate Lom considers as difficult the process of construction, maintaining & repairing of port infrastructure. The situation is similar with renting (land, port platforms, office spaces, warehouses, equipment), which is assessed as not effective. One of the main administrative processes performed by the experts in Lom is port dues collecting, which they assess with high complexity.

BPICo Branch-Territorial Directorate Ruse also considers the complexity of the construction, maintaining & repairing of port infrastructure as high. The experts in Ruse assess the process of renting (land, port platforms, office spaces, warehouses, equipment) as effective. They consider points 3-8 as not relevant for them.

The experts in MTITC consider as difficult the processes of construction, maintaining & repairing of port infrastructure and preparation and implementation of port security plans. They also assess as not effective the road traffic management process, put an average score to

the rail traffic management and consider effective the river traffic management. MTITC finds as effective the following processes: monitoring ship movements and information systems; issuing specific authorizations, licenses, certificates related to port activities; transhipment; storage; waste recycling and disposal.

Executive Agency for Exploration and Maintenance of the Danube River considers difficult the process of issuing specific authorizations, licenses, certificates related to port activities. They assess as effective the process of waste recycling and disposal. The Agency has assigned scores only to these two processes.

Port Complex Ruse J.S.Co. assesses as not effective the process of transhipment and as effective the storage process. These are the only processes assessed by the company.

Port Svishtov – Sviloza assesses as highly complex all of the administrative processes.

Port Invest ltd did not respond to this question.

DF Istar AD (Svishtov) has put average score to all of the administrative processes.

Croatia

The processes of construction, maintenance and repairing of port infrastructure are considered as complex in some way due to obligation of preparation proposal plan for construction and maintaining of the port facilities. Proposal plan is needed for the preparation of the mid-term plan for development that is adopted by the Croatian Government for the period of 5 to 10 years. In accordance to Mid-term plan, operational plans for constructions and maintaining are adopted annually by port authorities with approval of the Minister in charge for the inland waterways. At the end, after the approval tendering procedure can start.

Table 12: Level of complexity of administrative port process on a scale from 1 to 5 in Croatia

№	Process	Level of complexity
1.	Construction, maintaining & repairing of port infrastructure	4
2.	Renting (land, port platforms, office spaces, warehouses, equipment)	2
3.	Preparation and implementation of security plans	
4.	Ship cargo control	

5.	Monitoring ship movements and information systems	1
6.	Traffic management	
	River	
	Rail	
	Road	
7.	Issuing specific authorizations, licenses, certificates related to port activities	4
8.	Transshipment	
9.	Storage	
10.	Waste recycling and disposal	5

Source: National report – Croatia

Issuing specific authorization, licenses, certificates related to port activities are considered as process of granting of concession for providing the port services. Plans for granting concessions have to be a part of the development Mid-term plan and before tendering a study for granting concession needs to be done. Procedure of public procurement is considered as complex and usually for such procedures external experts are contracted.

Waste disposal is considered question of a high complexity due to non-functionality of the existed equipment and the waste disposal is conducted when need is shown. In such cases authorized company with license for the waste disposal has to be contracted.

Austria

The port of Vienna evaluated the complexity of the administrative port processes, referring to the correlation between volume of documents required, the number of personnel involved and time required to fulfil, with an average of 3, which means a mediocre complexity. Three of the mentioned processes are evaluated as very complex processes. These include “Construction, maintaining & repairing of port infrastructure” and “Preparation and implementation of security plans” - ranked with 4, which means that the complexity of this processes is indicated as “rather high”. In contrast “Renting (land, port platforms, office spaces, warehouses, and equipment)” was ranked with 1, meaning that this process is not very complex.

The Ennshafen port evaluated the complexity of the administrative processes conducted in the port mainly as moderate. Only the processes “Preparation and implementation of security plans” were indicated as less complex (ranked with 2). In contrast,

the administrative processes “Construction, maintaining & repairing of port infrastructure”, “Renting (land, port platforms, office spaces, warehouses, equipment)” and “Issuing specific authorizations, licenses, certificates related to port activities” were ranked as highly complex by the respondent.

Hungary

Administrative processes completed more often – every day in most cases – are clarified clear and easy, while procedures managed rarely are declared as more complex services according to the port owners/authorities. For instance, *Preparing and implementing security plans* was rated for 2 on a 5-scale, *Construction, maintenance and repairing port infrastructure* received 3, meanwhile *Controlling cargo ships,* was rated for 4 and *Renting* for 5. *Monitoring ship movements and information systems*, *Issuing specific authorizations, licenses, certificates* and *Traffic management services* were not mentioned by respondents.

With regard to the complexity of the administrative port processes, there were mentioned the following: the construction, maintenance and repair of port infrastructure are included among the most difficult activities (receiving significantly high marks, i.e. 3, 4) in all the ports surveyed.

As far as the category of complex processes are concerned, the waste recycling and disposal activities are mentioned in Bulgaria, Croatia, and Romania.

The rental activity varies in difficulty from a very easy activity in Austria, to an activity considered as average in terms of complexity degree.

5.1.9 Port processes harmonization initiatives

Romania

The interviewed port administrations mentioned the European financed projects WANDA, CO-WANDA, GIFT as actions including harmonization initiatives in the Danube ports.

GIFT Project

- Proposed new policies and strategies for infrastructure, investment, information technology and ICT communication, legislation, standards and standardization issues to promote innovative, environmentally friendly intermodal freight corridors.

- Analysed three Pan-European Transport Corridors, namely IV, V and VII, covering almost the entire South-Eastern Europe Region and prepared proposals for improving the transport network and for promoting green transport for the selected corridors.

WANDA Project

- Prepared coordinated ship waste management concepts on national level.
- Developed pilot activities for the collection and disposal of hazardous and non-hazardous ship waste.
- Created a basis for the elaboration and implementation of an international financing model for oily and greasy ship waste.
- Promoted cross-border communication and knowledge transfer through harmonisation activities.

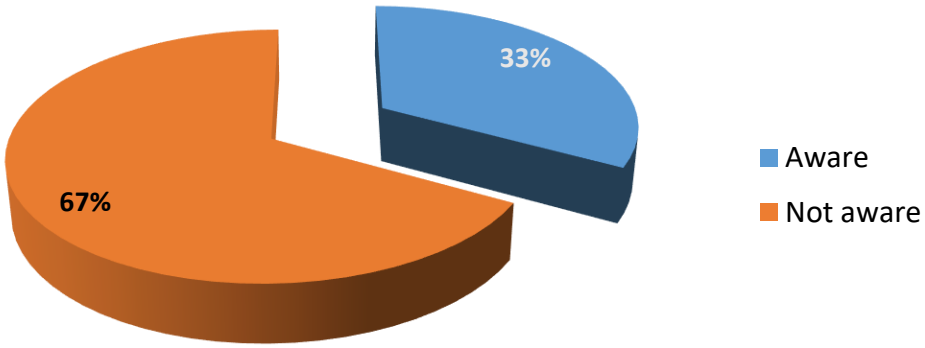
CO-WANDA Project

- Provided the technical background for an international convention: definition of a network of ship waste reception facilities along the river, analysis of on board waste prevention and pre-treatment procedures, advancement of applications of River Information Services (RIS) in the field of ship waste management as well as provision of an updated and improved version of the financing model elaborated in the project WANDA;
- Implemented pilot actions for the collection of ship-borne waste in several Danube riparian states (free of charge for skippers) in order to test solutions of a proposed financing system, balancing mechanisms and River Information Services;
- Drafted the structure and text of a legal document in cooperation with the European Commission, international organizations and national ministries that can form the basis for a future legally binding agreement between the Danube riparian states.

Bulgaria

Most of the participants responded that they are not aware about any initiatives for harmonization of port processes in the Danube ports. Only MTITC, and both BPICo Branches -Territorial Directorates – Ruse and Lom state that they have information about such initiatives.

Figure 19: Awareness of the respondents about port processes harmonization initiatives in Bulgaria



Source: National report – Bulgaria

MTITC points out different projects, relating port processes harmonization like ADB Multiplatform Project, Watermode Project, Hint Project, DANTE Project, Danube Steam Project.

BPICo Branch-Territorial Directorates – Ruse and Lom mention some specific examples. There are several initiatives in BPICo related to the harmonization of port processes along the Danube. Mainly this is the maintenance of two systems, namely:

- System for Electronic Processing of Documents in Bulgarian River Ports for performing inbound and exit border control of ships entering or leaving the river ports in the country– Single Window.

- River Information System in the Bulgarian Stretch of Danube River - BulRIS.

- DANTE project.

At the same time, BPICo participates in various projects, which are also related to initiatives to harmonize the port processes along the Danube – except DAPhNE, also DBS Gateway, RIS COMEX, etc.).

Port Svishtov and Port Svishtov – Sviloza declare that they do not know about any initiatives to harmonize port processes in the Danube ports.

Port Complex Ruse J.S.Co. also claims the same – they are not aware about any initiatives to harmonize port processes in the Danube ports.

Croatia

Regarding the participation in the harmonization initiatives port Authority Vukovar was participated as a project partner in two transnational projects WANDA and CO-WANDA, within the South East Europe Transnational Cooperation Programme.

The project WANDA (WAste management for inland Navigation on the DAnube) was aimed at establishing a sustainable, environmentally sound and transnationally coordinated approach in ship waste management – including the development and implementation of related measures – along the Danube in order to protect this water resource and its multifaceted eco-systems.

The main focus of CO-WANDA (Convention on Waste Management for Inland Navigation on the Danube) was the start initiative work for a binding treaty, which shall provide clear guidelines for ship waste management. The support of national and international authorities, stakeholders and opinion leaders is a driving force for the successful implementation of the inter-national cooperation activities. The harmonization and adaptation of currently running ship waste management systems will decrease the risk of illegal discharges of ship wastes and thereby support the protection of valuable river ecosystems and the means of livelihoods for future generations in the Danube region.

Nevertheless, the Port Authority also participates in the DANTE project, which is under implementation, as a part of the Danube Transnational Programme(DANTE project - Improving Administrative Procedures and Processes for Danube IWT). The DANTE project aims at identifying and eliminating administrative barriers for inland waterway transport (IWT) on the Danube & its navigable tributaries as a joint initiative of the private sector and the national public authorities responsible for these barriers.

Austria

Both ports are involved in or are aware of projects, which aim to enhance administrative processes in ports. The port of Vienna is involved in the DAPhNE and DBS Gateway region project. To increase the awareness of the harmonization of the administrative processes in ports along the Danube, the Ennshafen is involved in several initiatives under viadonau or INTERREG projects (DAPhNE, DANTE).

Hungary

70% of port owners/authorities are familiar with such initiatives harmonizing port processes. Most commonly, INTERREG DTP projects were mentioned e.g. DAPhNE (36%) and DANTE (18%). Respondents also know DAHAR, Energy Barge, DBS Gateway, and TalkNET, Wanda, INWAPO. In general, Danube Region Strategy was named as well as these exact projects above.

Additionally, commonly accepted IT systems standardizing administrative processes were mentioned here too, the respondent gave an example: RIS (River Information Services).

The analysed ports generally take part in the harmonization of port processes, except for the Bulgarian ports, which are mostly not interested in participating in such initiatives.

5.1.10 The permit/certificate validity for overall operation of the port

Romania

Port administrations in Romania may be organized as public institutions, autonomous agencies, national companies, or trading companies under the authority of the MT or under the authority of the local public administrations, depending on who owns the infrastructure.

For the ports where the port infrastructure belongs to the state the ports administration is established though Government Decision. This is the case for the main and the most Romanian ports.

For the ports where the port infrastructure belongs to the local public administration, the port administration is established through a Decision of the Local Council. If the port infrastructure belongs to a private entity, the port administration is a legal entity designated

by the owner of the infrastructure. In this two cases the port administrations must be authorized by MT.

Bulgaria

All of the Port operators state that they have valid certificate for exploitation suitability (fitness) of the port and its duration is in accordance with the duration of the concession contract or other circumstances determining its duration:

Port Svishtov – Sviloza has certificate for exploitation suitability of the port until 14.11.2051.

The duration of the certificate for exploitation suitability of the port of Port ADM Silistra is one year.

The Special purpose port of Executive Agency for Exploration and Maintenance of the Danube River is in process of obtaining a certificate for exploitation of the port.

The terminals, operated by Port Complex Ruse J.S.Co., have certificate for exploitation of the port up to the granting of the terminals on concession /they are not currently on concession/.

Port Invest ltd. did not respond to this question. The term of the concession contract is for the period 2013 – 2048, so the certificate for operation of the port should be valid until 2048.

Port Svishtov is under concession since 2007 for 31 years. The certificate for operation of the port is valid until 2038.

The port terminals that are in the territorial scope of BPICo Branch-Territorial Directorates – Ruse and Lom have different duration of their certificates for operational suitability of the port after they are concessioned. The biggest importance is the specific contents of the clauses of the concession contract. Currently, the longest duration of concession contract in Bulgaria can be 35 years. When a terminal is not yet granted under concession, but is in a process to be granted, the duration of the certificate for operation of the port is valid until the signing of the concession contract.

After the last amendments of the MSIWPRBA, MTITC no longer issues the certificates for overall operation of the port, as this became obligation of the Executive Agency Maritime Administration (EAMA).

Nevertheless, the Ministry observes the concession contracts and the duration of the certificates for port operation. There is a specialized Directorate in MTITC - "Concessions and Control of the Activity of the Trade Associations and Government Enterprises" that has the obligation in this field of activity on behalf of the Minister.

Croatia

According to the Croatian legislation a port is opened and classified with decision issued by Ministry of Maritime, Transport and Infrastructure and can be opened for national and international transport depending on the specific conditions in terms of available equipment, capacities, traffic connection and navigation safety. From the mentioned permit/certification for operation of the port is not determined by duration, then with the specific conditions that port must fulfil.

Duration of concession in public ports for public service with purpose for providing nautical service up to 5 years and for the transport service is up to 15 years.

Austria

Concerning the duration of the permit/certificate for the overall operations in the port, the period is defined in an agreement/contract. The audit for proper operations through the respective administration takes place once a year.

For the Ennshafen port there is no duration of the permit/ certificate for operation of the port and audits for proper operation by the administration are very seldom.

Hungary

Certificates validate the overall operation of ports for 10 years in most cases. Half of the ports have permits until 2021-2024. One respondent claims validity varies berth by berth and has not mentioned the longest permit. 36% of respondents did not specify the certain date, not even the year till their certificates' validity, simply said permits are valid for 10 years.

Concerning the validity of port operating certificates under the specific national legislations, there are different situations. Whether there are valid operating certificates (Bulgaria), or these certificates are unnecessary (Croatia, Austria), as there are other systems

for verifying/ auditing the operations, or port operations are carried out under Government Decisions (Decisions of Local Authorities - Romania).

5.1.11 Port audits

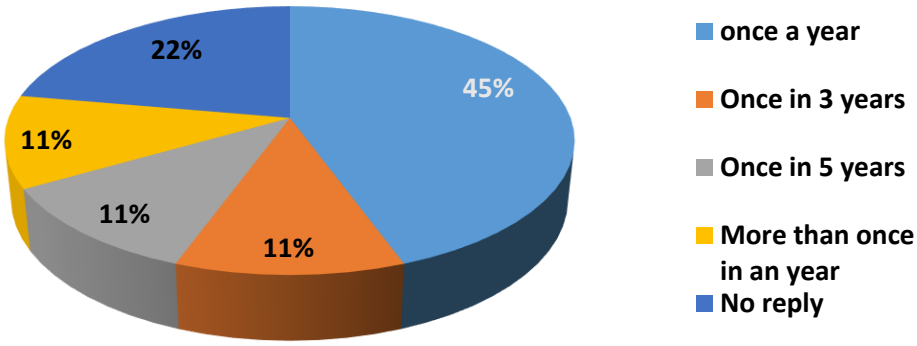
Romania

Since there are no ports belonging to local public administration or private entities, no audits for overall operation of the port are organized.

Bulgaria

Port audits for proper operation of the ports in Bulgaria are carried out by qualified experts of EAMA. According to the Bulgarian legislation and the answers of the respondents the frequency of the audits for proper operation of the different ports is carried out as follows:

Figure 20: Frequency of port audits in Bulgaria



Source: National report – Bulgaria

DF Istar AD states that Port Svishtov is audited once a year.

Port Svishtov – Sviloza is audited more than once a year.

Port ADM Silistra is audited once a year.

Port Invest ltd did not respond to the question.

The Terminals, operated by Port Complex Ruse J.S.Co., are audited once a year.

The experts in MTITC point out that the audits for proper operation of the ports are carried out at least once in 5 years and that other audits should be carried out within that period also. This is in accordance to art. 98 (1) of Ordinance 9/17.10.2013 on the requirements for operational suitability of ports, which states, that audits for proper operation of the ports should be carried out:

1. at least once per 5 years – for ports and port terminals;

2. every year – for specialized port facilities.

The Ordinance regulates the execution of planned and targeted audits by EAMA, as the exact period of the audit is not specified.

All of the Branch-Territorial Directorates of BPICo do not have the authority to carry out audits for proper operation of the ports located in the Bulgarian section of the Danube. When port terminals operated by BPICo are audited for proper operation, the audits may be carried out once a year or when there is a change in circumstances.

Croatia

Frequency of audits for proper operation of the port users by port administration are not strictly define with legislation. Nevertheless, it is allowed to provide supervision of the port user's work and performers of contracts obligations, as well as inspection of business and financial documents of a port user. Mainly, port users are obligated to delivered quarterly reports for performed work, and as well as annually report.

Austria

Concerning the duration of the permit/certificate for the overall operations in the port, the period is defined in an agreement/contract. The audit for proper operations through the respective administration takes place once a year.

For the Ennshafen port there is no duration of the permit/ certificate for operation of the port and audits for proper operation by the administration are very seldom.

Hungary

Port audits for proper operation are held at least annually. 45% said, once a year their ports are controlled for proper operation, and more than once a year in 55% of the cases. One respondent noted, that market players are the truest judges, charterers will not have demand for the certain port services, once its quality level decreased.

5.1.12 Port services provided by the private sector

Romania

The following port processes are considered that registered improvements compared to service provision by public bodies:

- Safety services: towage and pilotage;
- Firefighting services;
- Sanitation services;
- Security services and perimeter access.

The improvements have been registered due to an increased flexibility in organization of operational processes and reduced administrative documents and processes.

Bulgaria

BPICo Branch-Territorial Directorate Ruse is the only respondent that answered to this question. The activity of the private sector is not controlled by BPICo. and by the Branch specifically. The lack of requirement for communication with BPIColeads to a suggestion that private sector acts autonomously when deciding to invest in port infrastructure, thus making the process less bureaucratic, more flexible and quicker.

Port ADM Silistra is in exploitation for less than a year and cannot express opinion about this question.

The lack of opinion on the question can be explained either with lack of observation by the respondents or with unwillingness to share their position.

It can be assumed that the state follows a policy of encouraging the participation of private business in port activities. Such a conclusion is based on the strategy to grant concessions for management of ports to private companies. The Strategy for Development of

the Transport Infrastructure of the Republic of Bulgaria through the Mechanisms of Concession[18]provides for the involvement of private investors in the transport infrastructure development process in order to optimize transport activities and services of public interest and to provide additional financial resources through the use of resources, expertise and know-how from the private sector against the obligation of the concessionaire to build and manage and maintain the object of concession or manage the service at its own risk.

Towards the end of 2017 there are already 7 river port terminals in Bulgaria given on concession. MTITC prepares another 4 port terminals of national importance for concession procedures. At the same time, private terminals are functioning and are developing quite well, which testifies for the good environment for private business initiatives.

Croatia

Port services that are provided in the port are divided on the: nautical services, transport services, service of reception and conveying of passengers, forwarding services and port and port agency services. Private operator can perform all port services according to granted concession for specific port service by public bodies. As already mentioned Port Authorities are public institutions that provide granting concessions for providing port services in the ports.

Austria

Concerning the responses of the two interviewed port authorities, the Ennshafen port indicated that there were no improvements concerning administration processes registered concerning the provided services (public/private). The port of Vienna mentioned that the same laws, frameworks and guidelines apply whether in the private or public sector.

Hungary

First of all, it is important to notice, that very few of the ports disagree with the statement port services provided by the private sector has automatically improved the effectiveness and quality level. Two thirds of respondents listed the advantages of privatized services:

[18]https://www.mtitc.government.bg/sites/default/files/strategia_concessii_24042013_1_1.pdf

- port services are available non-stop this way, that they are provided by private bodies
- experts and professionals are well-educated and have the most suitable knowledge
- infrastructural developments could be finally completed thanks to the private sector
- connection and communication between members of HFIP is better than before
- flow of information has become faster
- private sector has a more flexible attitude to complete tasks
- efficiency has increased due to daily contact
- cost-efficiency
- electric / IT services
- faster loading
- more flexible problem solving, issue handling
- private companies are interested in fast service provision

5.1.13 The improvements of port administrative processes during the past 5 years

Romania

The Maritime Ports Administration Constanta and The *Maritime Danube Ports Administration* mentioned the following processes considered as improved during the last 5 years:

- Managerial planning
- Integrated management policy
- Planning and control of risks
- Providing port services
- Communication with port stakeholders
- Ship movement monitoring

No significant progress in administrative processes was mentioned by *The River Danube Ports Administration Giurgiu.*

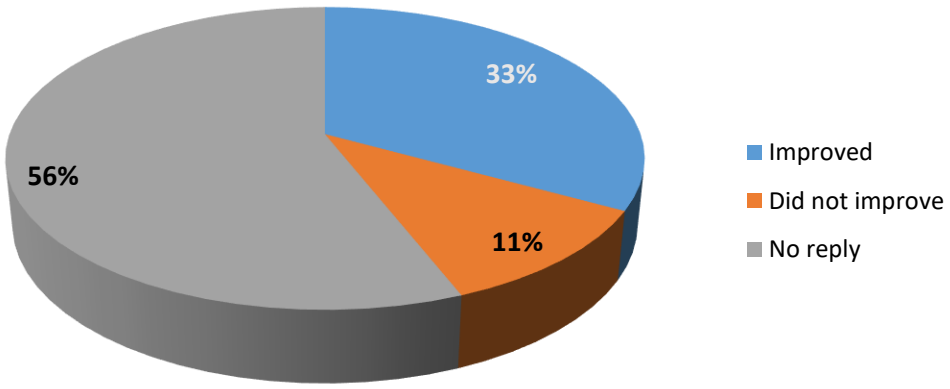
Bulgaria

Most of the respondents (56 %) did not answer to this question.

Port Complex Ruse J.S.Co .sees improvement in the internal business correspondence.

Because of the short exploitation period ADM Silistra does not respond to this question also.

Figure 21: Improvements of port administrative processes in Bulgaria



Source: National report – Bulgaria

BPICo reports significant improvements in the administrative processes over the past five years and is continuing to act in this direction. The main improvement is the exchange of information and the issuing of documents related to the ship visits and the cargo handled. Thus, the administrative interaction between the various participants in the port market is greatly improved. As good examples can be pointed out:

- the presence of river information system – BulRIS;
- implementation of integrated information system for resources and information management in BPICo – facilitates the process of issuing invoices and analysis of the business, and hence favours the process of decision-making.

Croatia

During the past years some administrative process were improved, such as announcement of vessels arrival, information exchange, implementation of electronic system for monitoring of port traffic, software for archiving official documents, as well as adoption of legislation that defines port agency services.

Data for vessels arrival announcement are unified and they are same for the Port Authority as well as for Harbour Masters. Exchange of information between Port Authority and port operators are performed via e-mails, while monitoring of port traffic is ensured via electronic system that provides additional information that also can be useful for Border Police and Customs.

By adaption of the legislation related to the port agency services it is ensured the fastest process for conduction of administrative procedures related of vessel arrival, as well as informing and distribution of documents to competent authorities, such as Border Police, Customs, Harbour Masters and Port Authority.

Implementation of the software for archiving official documents ensures safe storages of all official document that are issued by Port Authority of received, as well as simplified browsing of documents.

Austria

From the point of view of the port of Vienna there are several administrative processes which have improved over the past 5 years in the port sector. The Port of Vienna mentioned that the harbourmaster has gained more responsibility over the past 5 years, so that he is able to actively implement projects in the port area, also the documentation of traffic was facilitated and simplified over the last 5 years.

The Ennshafen port indicated that only the general IT support for all processes has increased in the past 5 years.

Hungary

Almost 50% of respondents clearly say there have been no improvements of port administrative processes implemented in the previous years. According to the other half of respondents,

- expanding private sector,
- EU harmonization,
- more detailed data collections,
- developing monitoring system,
- info-communication background

have all contributed to establish a more upgraded port administration. The picture is not black and white. On one hand improvements are mainly related to ship documentation due to more modern technical equipment and the expertise of port service providers. On the other hand, there are elements in the administration requiring excessive resources or excessive work for instance the registration of port road vehicles and the introduction of Electronic Public Road Trade Control System (EKÁER).

5.1.14 Vessel audit by the corresponding administration

Romania

The port administrations in Romania are not entitled to perform audits on board of vessels.

Such audits are under the responsibility of Romanian Naval Authority and they are organized according to ship risk profile with a frequency between three months to one year.

Autoritatea Navală Română (the Romanian Naval Authority) – a public institution established by Government Resolution no. 1133/2002 having among responsibilities:

- ensuring and developing safety standards for navigation in Romanian ports;
- carrying out controls to prevent pollution from ships;
- monitoring ballast, bunker and waste disposal operations;
- investigation of pollution incidents from ships, developing an information and communication system integrated into international information exchange projects related to waterborne transport.

Bulgaria

MTITC, as well as BPICo Branch-Territorial Directorates – Ruse and Lom do not own vessels and this question is not relevant for them. Their main activity as port authorities is not focused on the ownership and management of vessels. Having in mind the control functions of EAMA, it is more capable of commenting in detail the information about vessel audit in Bulgaria.

Vessel audits are done by inspectors of EAMA, exercising state flag control on the basis of Ordinance No 11 on inspections of vessels and vessel owners.

According to Art. 37. (1) of the Ordinance, regular specific audit of ro-ro ferry or high-speed passenger vessel shall be carried out once per period of 12 months as well as after a change in circumstances. Art. 56. states that the validity of Community certificates issued to newly built vessels in accordance with the provisions of the Ordinance on technical requirements for inland waterway vessels shall be determined by EAMA and may not be longer than:

1. five years for passenger ships;

2. ten years for all other vessels.

The inspectors carry out periodical audits in order to confirm or extend the validity of the above certificates.

According to Port Complex Ruse J.S.Co. vessel audit is carried out every 3 years.

ADM Silistra didn't answer because of their short period of exploitation.

Croatia

No answer was provided.

Austria

Referring to the audit of vessels for their permit for sailing, neither the port of Vienna nor Ennshafen port could provide information, as the process is not performed by these two organizations. Concerning the documents which are necessary when a vessel visit a port in Austria, both organizations confirm that the number of documents is less than 5.

Hungary

In many cases (33%), vessel audit is not relevant, respondents said, since they do not manage vessel audits. 50% of respondents make vessels audited by corresponding administration in every month, 16.7% once in 3 months.

5.1.15 Documents required when a vessel visits a port in the country

Romania

The number of documents presented when the vessel visits the ports under survey is considered to be still high. Half of the study participants declared that the ships must present more than 10 documents to the Romanian authorities at each port call.

For the Port of Constanta, the Convention on Facilitation of International Maritime Traffic (FAL Convention) is applicable.

The Convention includes in its Standard 2.1 a list of documents which public authorities can demand of a ship and recommends the maximum information and number of copies which should be required.

IMO has developed Standardized Forms for seven of these documents, which are[19]:

- *IMO General Declaration* (FAL form 1)
- *Cargo Declaration* (FAL form 2)
- *Ship's Stores Declaration* (FAL form 3)
- *Crew's Effects Declaration* (FAL form 4)
- *Crew List* (FAL form 5)
- *Passenger List* (FAL form 6)
- *Dangerous Goods* (FAL form 7).

Bulgaria

Similarly to the comments to the previous question the low percentage of responses is determined by the irrelevance of the question to the activity of most of the respondents.

BPICo Branch-Territorial Directorate Ruse and ADM Silistra answer that the number of documents required when a vessel visits a port is between 5 and 10.

MTITC states a number between 17 and 23.

[19]*National report – Romania, www.imo.org*

According to the Ordinance on the organization of the implementation of border passport control, customs, health, veterinary and phytosanitary control, as well as control of the means of transport in the ports of the Republic of Bulgaria, serving ships on international voyages, the documents for control of the river ports shall be submitted through the System for Electronic Processing of Documents in Bulgarian River Ports– Single Window. BPICo, develops, maintains and administers the System from July 2016. Over 30 ship agencies with about 100 end users work with the system. The system is developed in accordance with Directive 2010/65 / EU on reporting of ships arriving and departing from Member States' ports. Three months after its official launch, more than 2500 notifications and more than 2700 general statements have been submitted. The average time for processing a joint entry / exit declaration is between 15 and 30 minutes.

The following specific documents are mentioned in the Ordinance:

- Notification with additionally applied: 1. crew list; 2. passengers list; 3. cargo declaration for dangerous goods.
- At the moment of arrival of the vessel in a river port of the Republic of Bulgaria, the following documents shall be submitted in electronic format:

1. general declaration - the document is generated by the System for Electronic Processing of Documents in Bulgarian River Ports;

2. cargo declaration, bill of lading, manifest or other cargo document;

3. declaration of ship's provisions;

4. crew property declaration;

5. declaration of absence of passengers without a ticket, weapons, narcotic drugs and other prohibited or restricted items, as well as live animals, including birds;

6. information on the type and volume of the waste - result of shipping activity and ship cargo residues on board.

Croatia

No answer was provided.

Austria

Concerning the documents which are necessary when a vessel visit a port in Austria, both organizations confirm that the number of documents is less than 5. No detailed information about which documents are required was provided.

Hungary

Nota bene: there are no specific documents for ports necessary only in Hungary. What is required here, it is the same in the European Union. However, the three most important ones among these papers are the *River way bill* and the *Cargo Manifestand NOR (Note of Readiness)*. Others could be skipped in certain ports if not relevant. The average number of required documents when a vessel visits a port in Hungary is 6. The most commons according to the respondents are:

- River way bill
- Cargo manifest
- Customs documents
- Tonnage certificate
- Navigation certificate
- Report for the port

5.1.16 Electronic exchange of information with the port users relevant to operation of the port

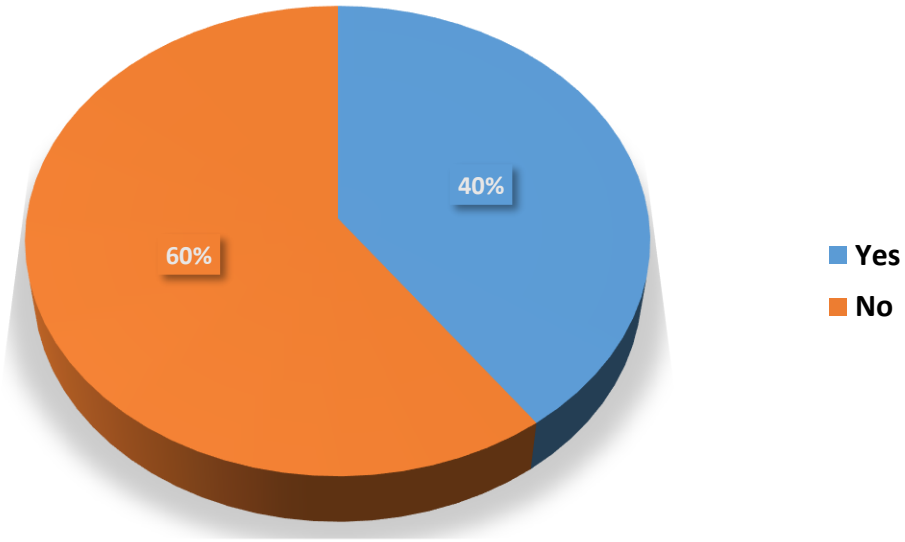
Romania

All port administrations in Romania use to have electronic exchange of information with the port users.

Anyhow there is real need for port community system to be used as platform for exchanging information among port users.

Bulgaria

Figure 22: Electronic exchange of information in Bulgaria



Source: National report – Bulgaria

Port ADM Silistra does not use electronic exchange of information with the port users.

According to the answers of MTITC and BPICo Branch-Territorial Directorate Lom electronic exchange of informationwith the port users in connection with port operation is not used.

BPICo Branch-Territorial Directorate Ruse and Executive Agency for Exploration and Maintenance of the Danube River use electronic exchange of information with the port users in connection with port operation.

Port Invest ltd, Port Svishtov West and DF Istar AD did not respond to the question.

Croatia

No answer.

Austria

Both organizations - the port of Vienna as well as the Ennshafen port - use electronic exchange of information with the port users and indicate that as a relevant service for the

operation of a port. The ports also obtain electronically statistical and/or other data from port users and use paper copies from the electronically received data.

Both companies mentioned that they have meetings on a regular basis with other relevant institutions to the port activity (customs, border control etc.) and with port users.

In addition, the respondents were asked to indicate the most time consuming administrative processes. The Port of Vienna indicated the following administrative processes as the most time consuming:

- Construction of Port infrastructure
- Ship cargo Control
- Customs processes
- Public procurement law

The Port of Vienna also mentioned that these listed procedures are very important for a regulated procedure in the port. In addition, they mentioned that the administrative processes in day-to-day operations are not that time consuming and therefore there are no elimination suggestions.

To further promote and improve the administrative processes in Austrian ports and along Danube ports the Ennshafen port mentioned that the activities of the project DAPhNE (WP5 – Port Development) can generate an important input.

Hungary

More than 80% of respondents communicates via e-mail with other organizations within the port. Less than 20% makes phone calls for information transfer.

5.1.17 Electronic statistical and/or other data from port users

Romania

The statistical information required by Romanian port administrations on daily basis, as well as other similar data is revived in electronic format.

Anyhow, there are still enough situations where port users are required to provide papers in order to go through administrative processes.

Such processes include:

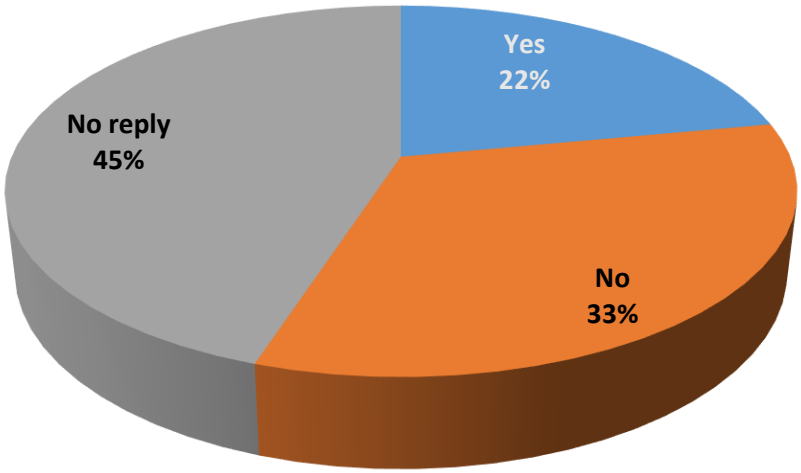
- Ship notification;
- Work permit;
- Port access permit;

Bulgaria

According to Ordinance No 919 of 08.12.2000 on the collection of statistical information about the activities of the port operators and the port and port facilities owners in the Republic of Bulgaria, any port operator carrying out port operations on the territory of the Republic of Bulgaria is obliged to submit statistical information to the official statistical information body for the country for the carried goods and passengers on inland waterways. The system for submission of this type of statistical information is online based and the information is submitted in real time.

Port users are not obliged to submit statistical information! Based on the initial documents submitted by the users in connection with the visit and processing of the vessels, the operators create statistics, which contain basic indicators of their activity - types of vessels, quantities and types of cargo, number of passengers, etc.

Figure 23: Submission of electronic statistical and/or other data from port users



Source: National report – Bulgaria

The system for generating and processing statistical information about the processed quantity of cargo and number of passengers in the Bulgarian river and sea ports is PORTSTAT. Every port operator is obliged to submit statistical data on processed vessels, cargo and passengers through the terminal in real time for each month. The obtained data from all port operators is summarized, processed and sent to the National Statistical Institute, as well as to Eurostat.

Port ADM Silistra does not receive electronical statistical data from port users, the data is received only on paper.

BPICo receives electronic statistical and other data, related to shipping on the Danube. Although the information is obtained electronically, it is also received on paper, which complicates the implementation of work processes at port terminals in general and requires additional and unnecessary work.

Croatia

Data for vessels arrival announcement are unified and they are same for the Port Authority as well as for Harbour Masters. Exchange of information between Port Authority and port operators are performed via e-mails, while monitoring of port traffic is ensured via electronic system that provides additional information that also can be useful for Border Police and Customs.

Austria

Both organizations - the port of Vienna as well as the Ennshafen port - use electronic exchange of information with the port users and indicate that as a relevant service for the operation of a port. The ports also obtain electronically statistical and/or other data from port users and use paper copies from the electronically received data.

Both companies mentioned that they have meetings on a regular basis with other relevant institutions to the port activity (customs, border control etc.) and with port users.

In addition, the respondents were asked to indicate the most time consuming administrative processes. The Port of Vienna indicated the following administrative processes as the most time consuming:

- Construction of Port infrastructure
- Ship cargo Control

- Customs processes
- Public procurement law

The Port of Vienna also mentioned that these listed procedures are very important for a regulated procedure in the port. In addition, they mentioned that the administrative processes in day-to-day operations are not that time consuming and therefore there are no elimination suggestions.

To further promote and improve the administrative processes in Austrian ports and along Danube ports the Ennshafen port mentioned that the activities of the project DAPhNE (WP5 – Port Development) can generate an important input.

Hungary

More than 80% of respondents receive statistical and other data electronically from port users.

5.1.18 Meetings with relevant institutions to the port activity and with port users

Romania

There are no regular meetings organized by port administrations with relevant institutions and port users in the ports under survey. But whenever changes in legal or economic framework are planned to be implemented the port administrations are organizing consultations with port community and collect feedback in order to find best solutions in development of port processes.

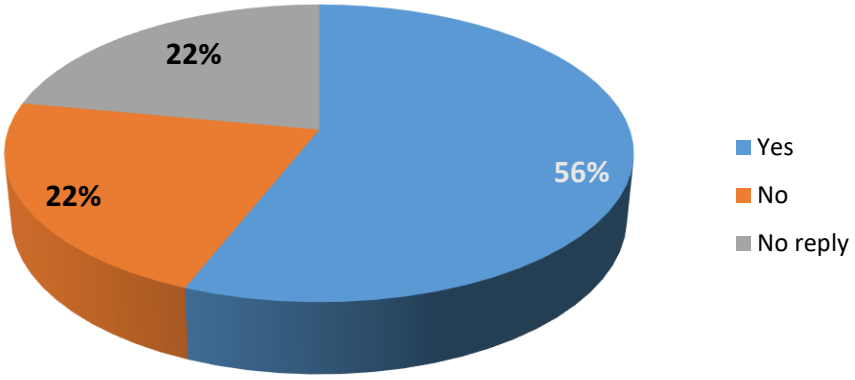
During the last period, the Port of Constanta and Port of Galati has improved significantly their communication with port stakeholders, including the city representatives, in the debates on port future developments.

Bulgaria

BPICo Branch-Territorial Directorates – Ruse and Lom regularly take part in meetings with other institutions regarding port activities and users. They also participate in various

conferences, symposia and stakeholder meetings. Most of the times BPICo is the initiator of such meetings.

Figure 24: Regular meetings with institutions in Bulgarian ports



Source: National report –Bulgaria

Representatives of ADM Silistra, DF Istar (Svishtov) and Svishtov-Sviloza have regular meetings with other institutions on port activities and users. They also participate in various conferences, symposia and stakeholder meetings.

MTITC and Executive Agency for Exploration and Maintenance of the Danube River do not have regular meetings with relevant institutions and port users regarding port activities.

Croatia

No answer was provided.

Austria

Both port authorities mentioned that they have meetings on a regular basis with other relevant institutions to the port activity (customs, border control etc.) and with port users.

Hungary

Most of respondents keep meetings with relevant institutions related to the port activities and services and with port operators on a daily basis.

5.1.19 Time consuming administrative procedures

Romania

None of the port administrations from the ports under survey considered administrative procedures that should be eliminated due to the fact that they are a result of legal requirements or operational needs.

With regard to the procedures to be removed, it is interesting that although many are considered time-consuming, most of the respondents did not have any suggestions regarding their removal.

Bulgaria

No feedback was received on this issue. Only ADM Silistra states that there are not enough observations due its short working period.

Croatia

No answer was provided.

Austria

The Port of Vienna also mentioned that construction of port infrastructure, ship cargo control; customs processes; public procurement law procedures are very important for a regulated procedure in the port. In addition, they mentioned that the administrative processes in day-to-day operations are not that time consuming and therefore there are no elimination suggestions.

Hungary

However, custom clearance *is* an administrative procedure considered to be eliminated in its present form, digitalization would make processes easier and fluent too.

Besides, in case of introducing the Note of Readiness (NOR) it would be resulting additional procedures in ports, but on the other hand, it would make time administration easier, more fluent between owners, charterers and ports. There are shipping companies for whom presenting NOR is mandatory, but not all shipping companies deal with it.

5.1.20 Administrative procedures considered for elimination

Romania

None of the port administrations from the ports under survey considered administrative procedures that should be eliminated due to the fact that they are a result of legal requirements or operational needs.

Bulgaria

No feedback was received on this issue. Only ADM Silistra states that there are not enough observations due its short working period.

Croatia

No answer was provided.

Austria

No elimination suggestions were made.

Hungary

However, custom clearance is an administrative procedure considered to be eliminated in its present form, digitalization would make processes easier and fluent too.

Besides, in case of introducing the Note of Readiness (NOR) it would be resulting additional procedures in ports, but on the other hand, it would make time administration easier, more fluent between owners, charterers and ports. There are shipping companies for whom presenting NOR is mandatory, but not all shipping companies deal with it.

With regard to the procedures to be removed, it is interesting that although many are considered time-consuming, most of the respondents did not have any suggestions regarding their removal.

5.1.21 Suggestions/Proposals/Comments regarding the administrative port processes and future directions for development and harmonization along the Danube ports

Romania

The port administrations surveyed proposed as future steps in development and harmonization along the Danube ports

- A common platform for collaboration between the port administrations for the Danube riparian countries.
- Documents presented to the port authorities and other institutions.
- Information provided by the authorities to the port users.

Bulgaria

When responding to the questionnaire, no respondent made any suggestions or comments on the matter.

Croatia

No answer was provided.

Austria

To further promote and improve the administrative processes in Austrian ports and along Danube ports the Ennshafen port mentioned that the activities of the project DAPhNE (WP5 – Port Development) can generate an important input.

Hungary

Electronic custom clearance is practiced at certain ports, but it is not common. As many documents should be facilitated and supported by IT services on digitalized platforms as possible. This process has begun, but current paper-based administration also could be shifted onto an IT basis.

The same lack of reaction is also noticed with regard to the proposals for improving the administrative processes and the development direction.

5.1.22 Conclusions regarding the administrative port processes – points of view from port authorities, port administrations and port owners – based on the national reports

Romania

For the present study, six ports in Romania, managed by three companies, were analysed. The legal framework for the organization of port administrations is the same for all three organizations, setting almost the same requirements and responsibilities.

Since the port administration's response rate was 100%, the data collected is relevant and sufficient to have an overview of the elements studied for this report.

Particularities and disparities between ports are generated by the following aspects:

- Direct access to seagoing ship routes (the case of the Port of Constanta);
- Total cargo throughput;
- Hinterland connections;
- Infrastructure development;
- Hinterland potential economic development;
- Level of co-operation among port stakeholders.

Ports have the ability to operate almost all types of goods, but their traffic is still linked to the economic characteristics of their hinterland.

There is a real need in the hinterland for the development of container traffic, but the navigation conditions on the Danube and the development of the infrastructure are still barriers to be addressed in the next future.

In ports such as Galati and Giurgiu there already are initiatives for the development of multimodal platforms, financed through European projects, which will improve the response to this demand.

The port processes analysed are considered to be of medium complexity, and their improvement is primarily due to the cooperation capacity of port stakeholders.

Initiatives to harmonize administrative procedures and to address port processes are rarely found, most of them being the result of projects implemented or under implementation.

Even if the operation of a quality management system is not a legal requirement, all port administrations operate such a system, and in all cases this is integrated with another one or two other management systems based on international standards.

Bulgaria

Based on the above study and analysis of the received answers, it can be concluded that a good coverage has been achieved in terms of the number and location of respondents from the group of port authorities and administrations in Bulgaria. Of particular importance are the data and opinions of Port Invest ltd and Port Complex Ruse J.S.Co.as they are operators of the biggest freight terminals on Danube – Lom and Ruse – East. The views of the private port terminals are few. The opinions of MTITC and BPICo present point of view of the authorities, which is of key importance to this part of the report.

With regard to the purpose of the study: **to determine what aspects need to be simplified, modified and removed** in order to increase efficiency and reduce bureaucracy in connection with administrative processes in ports, the following conclusions can be made:

- The attitude is rather positive in relation to administrative processes in river ports;

- The lack of views on the improvement of administrative processes by port operators can be interpreted as a lack of development of internal port procedures. Measures could be taken both by operators and by the institutions imposing rules on the functioning of ports.

- The institutions (MTITC, BPICo, EAMA) could take measures to:

- ❖ reduce the administrative burden of the procedures for investments in port infrastructure and port facilities;
- ❖ promote the electronic exchange of information;
- ❖ support the cooperation between the ports in the territory of the country and their inclusion in consortiums and / or organizations.

The relative autonomy and independence of individual institutions and organizations on the other hand leads to the establishment of administrative procedures that meet their own requirements.

Even if the reason for modifying / eliminating a procedure is highlighted, the change is likely to occur relatively slowly or not at all, due to the opinion of the implementing organization that the relevant procedure is necessary or legally regulated.

Croatia

Due to the fact that on the Croatian part of the Danube River is located only one cargo port it is not possible to define and provide disparities between ports. However, Survey was conducted for one port only and at this chapter relates only on Port of Vukovar.

According to the purpose, Port of Vukovar is classified as a public port, while according to their significance as a port of the national significance. Furthermore, as a public port has obligation of providing public services, where vessels in national or international transport can perform transhipment operations, provision of supplies or change of crew. As a port of national significance, Port of Vukovar is established by the Republic of Croatia whose establishment, development and business operations are of interest of the Republic of Croatia in terms of transport and economy.

Port of Vukovar is managed by Port Authority Vukovar which is established by the Government of Republic Croatia as a public institution in charge for managing of the ports on the Croatian part of the Danube River.

In spite of the fact that port area is not big enough it is possible to provide the transhipment of variety goods, as well as possibilities for storages of transhipment different cargo types.

Port services are provided by port users, while monitoring of the port users, as well as monitoring of the port traffic and berths allocation are done by Port Authority Vukovar, and those administrative processes are not considered as complex.

Nevertheless, construction and maintenance of the port facilities are considered highly complex due to public procurement procedures especially for the procurement of the high value goods where is needed participation of large number education staff.

Regarding the waste disposal open issues, we consider that it could be solved by concession for those activities granting to private operator, as well as on the harmonization of processes and procedures through international initiatives.

Certification of the port from the aspect of quality certification is not obligatory, however Port Authority Vukovar has a quality certificate for ISO standards 9001, as well as for ISO 14001.

Although the port has good connection with hinterland by road and railway, better connections are needed, as well as reconstruction and modernization of the Port of Vukovar. Reconstruction and modernization of port would imply infrastructure and superstructure

modernization and improvement, in order to make possible better development of intermodality, as well as logistical services.

Austria

To sum up some facts concerning Austria, the Ennshafen port and the port of Vienna are two important trimodal hubs in Austria. The Ennshafen port is located at the heart of Europe and offers an ideal infrastructure for companies. It is situated on the main arteries of international transportation – on the Rhine-Main-Danube waterway and the north-south railway link from the Baltic Sea to the Adriatic Sea. The port of Vienna is the largest port on the Danube in Eastern Austria and its diverse logistical capabilities and capacities continue to be enlarged. Thus, it has the great advantage of being the largest trimodal logistics centre in Austria, bringing together road, rail and water transportation.

As a result of the survey conducted, there are several similarities in the two regarded Austrian ports. In general, the handling facilities, services and devices available as well as the cargo types handled in the port areas are very similar except that Ennshafen port also transhipps dangerous goods and gas - especially LPG and LNG, for this, no liquid bulk and crude oil are handled in Ennshafen port. The storage and warehousing facilities available in the port of Vienna are in the property of the port authority/owner. In contrast, the facilities in the Ennshafen port are in the property of the port operator, only the open storage is as well in the property of the port authority/owner as in the property of the port operator. This results from the different port management models of these two ports.

In contrast to the Ennshafen port, the port of Vienna has gained two types of quality certification ISO 9001 and GMP. The purpose of these is to increase customer satisfaction through the deliverance of quality products and services. By contrast the Ennshafen port has in regarding to the survey, no certification but is a member of IGÖD, EFIP,PDA/PDI and chamber of commerce with the key objectives to further strengthening the Danube activities. The membership within these mentioned associations enables several advantages to strengthen the position of Danube ports in Austria. In addition, both organizations operate in initiatives to increase the awareness of the harmonization of the administrative processes in ports along the Danube (DANTE, DAPhNE, DBS Gateway region...).

There are also some differences according the administrative process in the ports and their evaluated complexity. The port of Vienna is responsible for construction, maintaining & repairing of port infrastructure; renting (land, port platforms, office spaces, warehouses, equipment); preparation and implementation of security plans; ship cargo control and issuing specific authorizations, licenses, certificates related to port activities. The Ennshafen port offers four additional administrative processes in contrast to the port of Vienna, monitoring ship movements and information systems; traffic management in general; traffic management for rivers; traffic management for road and issuing specific authorizations, licenses, certificates related to port activities.

Looking back on the past 5 years, the port of Vienna mentioned several process in the survey, which have improved especially in the field of the harbourmaster, as opposite the Ennshafen port indicated that only the general IT support has increased.

Hungary

First and for most, as it turned out, such surveys are very useful, since there are no clear, consistent databases, studies containing and summarizing infrastructural conditions and technological backgrounds of Hungarian Danube ports. If there are, they are not available for the public, which would otherwise help market players, trading companies to choose the most suitable ports for their demand.

Secondly, we cannot present such patterns showing that well-equipped, large ports have similar opinions, while smaller ports have other points of view. Also, another analytical comment after processing results of the survey is that inconsistent or opposite answers could be given for different questions with similar subjects e.g. none of the ports said they were handling dangerous goods, but some stored them.

Internal conditions of port processes

Internal factors cover the main profiles, main activities, basic infrastructure of ports. As such, here we summarize the most typical types of products handled, basic infrastructure available and related administration services provided. Dry bulk cargo is the most common type of products handled in Hungarian Danube ports. There is a huge deviation among ports'

storage capacities. The largest warehousing capacity in Adony exceeds the overall storage capacities of other ports.

Regarding handling facilities, we can declare, these are mostly provided by port operators; authorities, management, owner organizations are rather responsible for providing the administrative background. The two most common port administration services are related to *construction, maintenance and reconstruction of basic port infrastructure* and *renting land, port platforms, office spaces, warehouses and equipment*. Besides managing administration procedures, services related to basic infrastructure such as supplement of fresh water and power are also provided by port management companies. However, they do not deal with waste on a high level contributing to the establishment of circular economies in the ports. Respondents manage basic disposal, but none of them recycle waste, that later in the frame of project DAPhNE may cause difficult challenges during the adaptation of jointly accepted models of industrial ecology.

External conditions of port processes

Extern factors per se describe ports in terms of their networks, initiatives they contribute to with their member- or partnership, and certificates provide clear evaluations on them too. Among initiatives harmonizing port processes along the Danube, respondents are familiar with many, especially RIS (River Information Services) as a *hard* element of procedure harmonization and *soft* ones e.g. projects in the frame of Danube Transnational Program.

Ports are embedded into the national supply chains as well by being members of HFIP and/or MLSZKSZ – Hungarian Federation of Logistic Service Centres just to name the two biggest and most popular associations ports under the survey mentioned. Although, almost 20% of the respondents are not members of any umbrella organization.

More than one third of respondents do not have any certificates, but many ports hold more than one. ISO and HCCP are the two most common types.

Most of permits validating port operation are until the first half of 2020s. Port audits are held in every year in 45% of cases or even more often (55%) by corresponding authorities. However, as long as demand exist for certain ports' services, market players will be partners of those ports. Vessel audits are not relevant for 33% of respondents, 50% manages it monthly, and 16% once in 3 months.

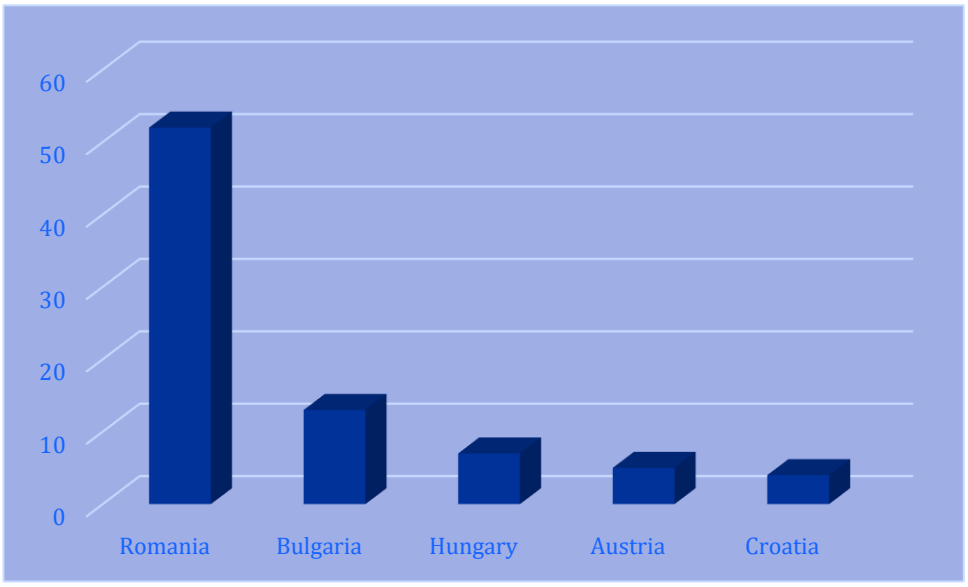
Communication and development of service provision

Ports under the survey meet their partners on a daily basis, and communicate electronically with institutes and authorities to make information flow more fluent and easier. However, port administration processes include only 1-2 very common documents to be presented by vessels visiting a port – respondents listed 6 papers in total – still one of the biggest challenge is to continue the digitalization of administration i.e. reducing paper work by developing ICT services. Port administration in general has improved a lot in recent years according to respondents, though there is no agreement among them on that, some say nothing has changed and not even expansion of private sector has helped. Even though, due to the private sector's flexibility, efficiency and faster loading services, EU harmonization, IT-based and more sophisticated data collection procedures have improved a lot. This course shall continue. E-custom clearance is recommended to be introduced and widely adapted by port administration organizations for easier and quicker service provision. The most time-consuming procedure is custom clearance, and NOR (not for every port, but those who deal with it). Through the digitalization of such services and processes, a higher level of standardization and harmonization could be achieved.

5.2. Research conducted on port users – data obtained from the ports under survey

The number of respondents differs significantly among the countries under survey (figure 25). While for Romania there were 52 respondents (with a 60% rate of non-responses), for Bulgaria there were 13 respondents (with a 81% rate of non-responses), for Hungary there were 7 respondents (with a 41% rate of non-responses), for Austria there were 5 respondents (with a 90% rate of non-responses), and for Croatia there were only 4 respondents.

Figure 25: The distribution of respondents among the countries under survey



Source: authors' processing based on the national reports

5.2.1. Port users categories

The port users' categories that took part in the research were as follows:

Romania

The selected and interviewed port users were port services providers / clients, who may be divided into the following categories (please see figure below):

- services for ships and cargo: loading/unloading, ships' and cargo agents, inspection and classification societies, etc.

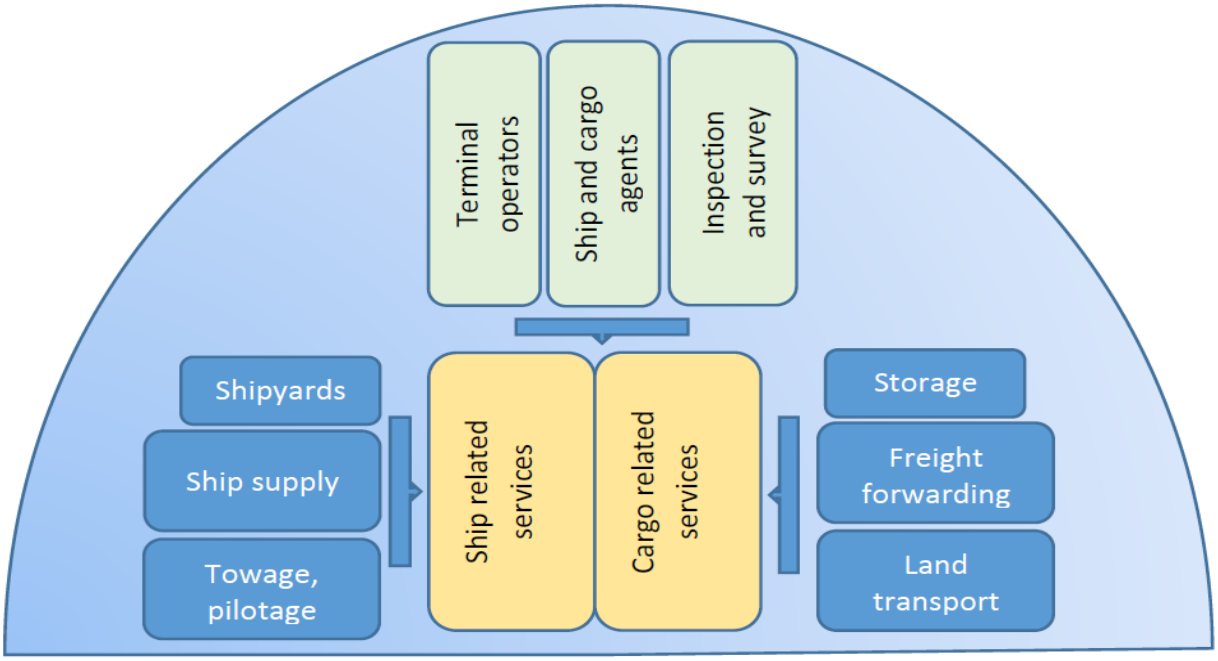
- services for ships: towage, pilotage, mooring/unmooring, ship repairs, ship supply, etc.

- services for cargo: stowage, storage, freight forwarding, container stuffing/unstuffing, land transport, etc.

Depending on the port-specific activities, some of the above mentioned services are available or not. Taking into account the size of the Port of Constanta, as well as the fact that this is a maritime port also, here the port user categories include all types of service providers.

The Port of Galati has a relatively large number of port users providing supply chain related services.

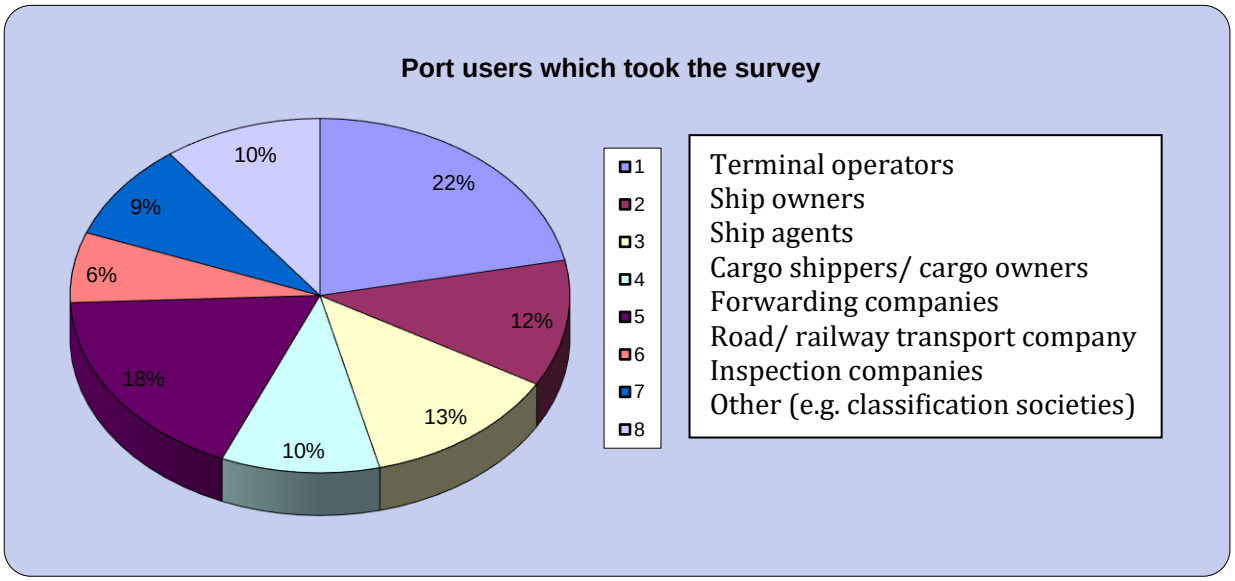
Figure 26: Port user' categories in Danube ports (Romania)



Source: National report – Romania

For the other Romanian Danube ports, the users are reduced to a limited number of port operators (one-two) and some companies (or branches) providing minimum services for ships and cargo.

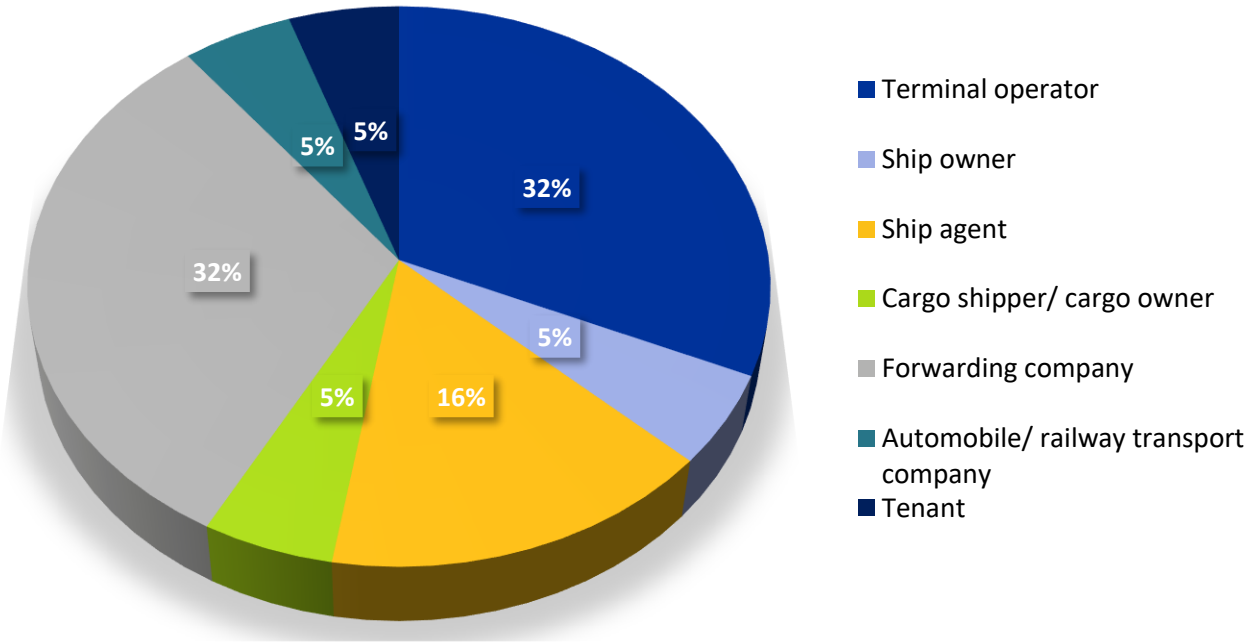
Figure 27: Port users from Romanian Danube ports taking part in the study



Source: National report – Romania

Bulgaria

Figure 28: Port users' categories (Bulgaria)



Source: National report – Bulgaria

I.Port operators – 6;

Port Complex Ruse J.S.Co. (PC Ruse) is one of the respondents that filled both parts of the questionnaire – part A and part B. Its answers are presented from the point of view of a port operator of Ruse – East port terminal.

Except as port owner, ADM Bulgaria Logistics ltd. filled part B of the questionnaire as port operator of port ADM Sillistra.

The same is the situation with Port Svishtov West AD – port operator of Svishtov – Sviloza – filled in both parts of the document.

Dredging fleet Istar AD – operator as per a concession contract of terminal Svishtov also filled both parts of the questionnaire.

Port terminal Ruse – free zone is operated by Free Zone Ruse JSCo. and as the previous operators filled both parts of the questionnaire.

Port Invest Ltd. is an operator of port terminal Lom as a concessionaire. Along with this, Port Invest ltd. is a shipowner and ship agent.

II. Forwarding companies - 6;

Hermes Lind ltd. is a forwarding company of grains and other cargo and works at port terminal Ruse – East. Hermes Lind ltd[20] is established in 2008 with head office in Ruse. Its main activities are related to:

- loading and unloading of bulk and general cargo at ports in Ruse, Svishtov, Lom, Vidin;
- river and road transport;
- customs services;
- storage of goods.

Another forwarding company, which works at port terminal Ruse – east is **Rubicon shipping ltd**. (http://rubicon-bg.com). The forwarder states that works in port terminals Svishtov and Nikopol. Rubicon Shipping ltd. is forwarder of bulk cargo – grain, feed, ores and concentrates along the Danube, provides logistics solutions for shipments of oversized and

[20] Source: National report – Bulgaria, https://www.informator.bg/cgi-bin/index.pl?_state=Info&ID=5405

heavy loads. At the same time, it offers complex solutions in the field of transport and construction of wind generators in Bulgaria.

Despred AD Ruse works as forwarder at port terminal Ruse – East.

Forwarding company **Holleman Bulgaria ltd.** (http://www.holleman.bg/) also works at port terminal Ruse – East. The company is the leading carrier of oversized goods on the Danube. Besides freight forwarder, the company is also a shipping agent, a cargo owner and a road transport company. Especially for the purpose of river transport and logistics of agricultural machinery, the company owns warehouses in the port of Ruse - East and Deggendorf, Germany. In its website the company states that the total storage area for 2012 is 45 500 sq.m. and for 2013 is more than 50 000 sq.m. For the needs of its customers, the company has also build its own warehouse area of 21 000 sq.m., which offers more flexible working hours and better service.

„Donau Transit" ltd. (http://donau.bg) is established in 1992 and is the first Bulgarian freight forwarder specialised in river, river-sea and combined transport via the Bulgarian ports. The Company has an average turnover of about 600 000 tonnes of cargo per year and offers the full package of forwarding services in the field of the waterway, road and combined transport including chartering, freight forwarding, arrangement of port cargo-handling operations, cargo storage, customs broking, cargo-insurance broking and other transport-related services.

Werta ltd. (www.werta.net) is a forwarding company that works at port terminal Ruse – East. The head office of the company is in Sofia and its activity is related to international and domestic freight forwarding, regular road import and export from and to Europe, air transport, warehousing and logistics, customs agency.

III. Ship agents – 3

Andrea Shipping and Trading ltd. is a ship agent that works at port terminal Ruse – East.

Ship agents are also Holleman Bulgaria ltd. and Port Invest ltd.

IV. Shipowners - 1

The only respondent that is shipowner is Port Invest ltd.

V. Cargo shipper/cargo owner – 1

Holleman Bulgaria ltd is cargo shipper.

The area of geographical coverage according to the head offices of respondents is the following:

Ruse – PC Ruse, Free zone Ruse, Donau Transit ltd., Despred AD Ruse, Holleman Bulgaria ltd., Hermes Lind ltd. Rubicon Shipping ltd., Andreea Shipping and Trading ltd.;

Silistra – ADM Bulgaria Logistics ltd.;

Svishtov – DF Istar AD, Port Svishtov West AD;

Lom – Port Invest ltd.;

Sofia – Werta ltd. /for Port Ruse/.

The largest is the number of respondents from Rousse - 70%.

With regard to representativeness in terms of handled cargo and in view of published information, PC Ruse (operator of freight terminals Ruse – East and Tutrakan) handles about 700 000 t per year.

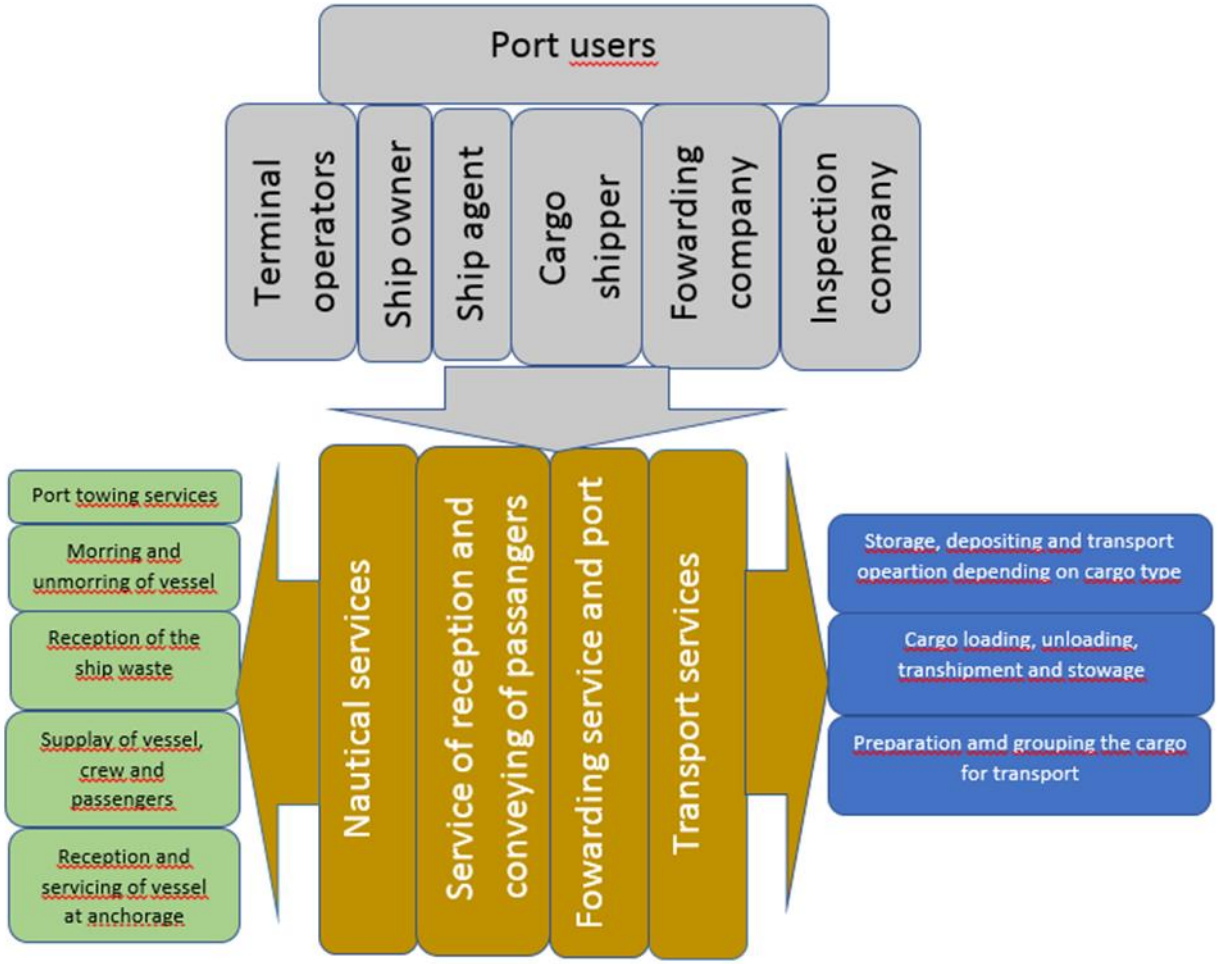
According to the planned yearly cargo quantities, the concessionaire of terminal Lom – Port Invest ltd. expected 480 000 t of cargo handled per year, but the actual data shows that in 2015 the cargo handled was 521 000 t. There is no available information about ADM Silistra. The data about DF Istar AD shows that in 2015 the cargo handled was 800 000 t. It should be noted that DF Istar handles mainly inert materials, which are connected with its main activity. This cargo type is the largest part of the cargo handled by the company.

Croatia

The survey has been conducted among the port users that have concession for port services provided in the Port of Vukovar. Conducted research covers different types of port users that provide port services such as loading/unloading of cargo, cargo transshipment, supply of vessel, port towing services, mooring/unmooring vessel, inspections (quality control) of goods, forwarding and port agency services.

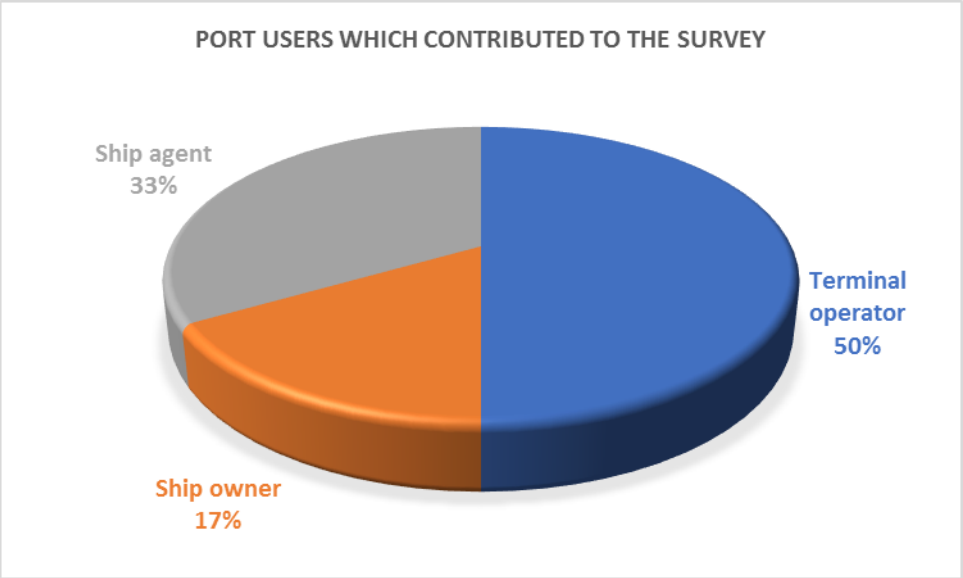
According to the Act of Inland Navigation and Inland Ports, port services are structured as shown in the figure below.

Figure 29: Comparison of port users with port services (Croatia)



Source: National report - Croatia

Figure 30: Croatian port users that contributed to the survey



Source: National report - Croatia

Austria

In **Error! Reference source not found.**13, the number of respondents clustered according to the port users' categories is stated. The port users were identified by a desktop research. All identified port users were contacted via email twice and called if no response was sent. Unfortunately, only five port users completed the questionnaire. Most identified port users mentioned that they are not able to provide answers, didn't want to take time to complete the questionnaire or didn't see any benefit by completing the questionnaire. Since port users were informed that the information would be anonymized, no company names are used in this report.

Table 13: **Port users' categories**

	Ennshafen port	**port of Vienna**
terminal operator	1	1
cargo shipper/owner	2[21]	-
forwarding companies	-	1

[21] According to the national report – Austria, one respondent classified the company as terminal operator and cargo shipper/ owner

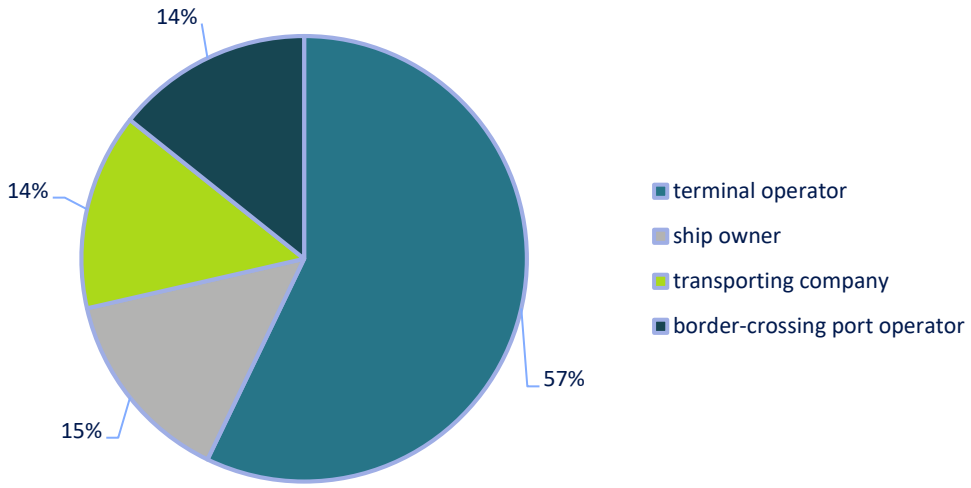
others	1[22]	

Source: National report – Austria

Hungary

57 % of the respondents are regular terminal operators. Besides, a ship owner, a charterer and a border-crossing port operator completed this section of the survey. Latter one has no infrastructural, technological facilities, only provides administration services, therefore it did not answer to a lot of questions but had some thoughts when was relevant.

***Figure 31*: Port user categories under the survey (Hungary)**



Source: National report – Hungary

5.2.2. Loading and unloading

Regarding loading and unloading, several criteria were subject to analysis:

- administrative procedures in ports;
- safety and security;

[22]According to the national report – Austria, the port user defined his company among "others" as a resident

- duration;
- quality;
- tariffs;
- fiscal legislation conditions;
- commercial legislation/rules/practices;
- collaboration between institutions (customs, port operators, port administration, etc.).

Romania

The administrative procedures in ports are generally considered as easy.

The concern about safety and security is mainly present in the Port of Constanta, and the ports on the maritime Danube. Here is the ISPS Code[23] applicable to seagoing ships.

Even if it is a key indicator, the duration of the loading/unloading operations is not considered a challenge by the port users.

All port operators pay attention to the quality assurance issue. This a reason why they operate a certified quality management system. Even if this is a challenge for the loading/unloading operations, more than a third of the port users selected level 1 in assessing this criterion and no one selected level 5.

The tariff issue is a current one in the debates organized in the port community. It was not expected that the port users will consider this process a simple one. They assessed it with an average score due to the existence of an improved communication among port stakeholders.

Lack of predictability of fiscal legalization is a real concern for the port users. Under these circumstances, it is very difficult for them to plan investments and prepare realistic business plans.

There are effective commercial practices in the Romanian Danube ports, which create a framework considered at an average level of complexity by the port users.

[23] National report – Romania, The *International Ship and Port Facility Security* (ISPS) Code is an amendment to the *Safety of Life at Sea (SOLAS) Convention* (1974/1988) on minimum security arrangements for ships, ports and government agencies.

Protocols for collaboration between institutions have been established, which has increased the effectiveness of communication between them. However, here is an area that still requires improvement efforts.

Bulgaria

The assessments of the effectiveness of loading and unloading by the port users is the following:

For point 1 **Administrative procedures** in ports, the received responses are – 7 easy and 1 average. The only negative assessment is of Despred AD Ruse.

Safety and security is assessed by 67 % (8) of the respondents as easy and 25 % as effective. The positive responses in total are 92 %. Again, Despred AD Ruse sets the only negative response. Probably this company has negative experience in working on a river port and believes that the activities need to be improved.

For point 3 **Duration,** the assessments again are in the scale of easy and effective 92 % (11). Two of the respondents consider this process as not effective – Despred AD Ruse and Donau Transit ltd.

The **Quality** is assessed as easy and effective again by 92 % of all respondents. One of the respondents thinks that it is not good (Despred AD Ruse).

The **Tariffs** and prices for loading and unloading received mainly positive assessments – 7 maximal assessments and 4 assessments with one point lower, but still positive. One of the respondents considers them as averagely effective (Donau Transit ltd.) and one gives lowest negative score (Despred AD Ruse).

The assessments of the **Fiscal and Commercial legislation conditions** varies depending on the specific experience of the respondents. Again the general positive attitude prevails, as only single respondent gave extreme negative opinions.

Concerning the **collaboration between institutions** such as customs, port operator, port administration and others only 8 responses were received. Most of them - 63% give the highest positive score, two give an average score and one considers cooperation ineffective and difficult.

From all answers received, as a conclusion it can be stated that with few exceptions the port users are rather positive towards the loading and unloading processes. Improvements

can be taken towards the legislation and collaboration between institutions in order to improve the port sector's image.

In its comments to the question, Donau Transit ltd. points out a specific problem: 20% VAT is charged on all cargo, including those originating outside the EU. In comparison, in Bulgarian seaports, all cargo is charged with zero-rate, including those originating in the EU.

Despred AD Ruse comments that the working organization of terminal Ruse – east is good, the staff team is good, but the results achieved by the various brigades are different in terms of loading and unloading standards.

Croatia

Half of port operators consider this process moderately effective, while the rest of them are divided between very effective and not effective. According to survey an average level of difficulty for administrative procedures could be summed up as moderately effective.

Regarding the safety and security port operators' opinion is divided between extremely, very, moderately and slightly effective, and average level of difficult for this processes is moderately effective.

From the view of duration of the loading and unloading processes port operators are also divided as about safety and security, and average level of difficulties for this process is also moderately effective.

Regarding the quality of unloading and loading processes opinions are divided and average level of difficulty is moderately effective.

As some survey criterion have a same result they are described together, such as tariffs and fiscal legislation conditions which are rated as moderately effective.

Also, in conducted survey regarding the criterion for commercial legislation/rules/practices and collaboration between institutions with port operators this criterion was rated also as moderately effective.

And in the end when all criterion for loading and unloading processes in the port sum up, we could draw the conclusion that port operators considered these processes moderately effective.

Austria

Ennshafen port:

Referring to the table below it can be seen that the terminal operators indicated the processes in the field of safety and security; the infrastructure quality; the regulations/behaviors in the port and the cooperation with various stakeholders as well organized (ranked with 2). In contrast, the processes concerning the complexity related to fiscal legislation and the tariff system for loading and unloading were rated with 4, which means it is not very satisfying. The last two categories in this field - administrative handling and the duration of loading & unloading - have been rated with 3. Thus, there is still room for improvement in these areas.

The cargo shippers/owners have classified the categories safety and security and infrastructure quality as rather adequate (1.5). The processes concerning administrative handling; duration, cooperation with various stakeholders and regulations/behaviours in the port were ranked in the upper middle range (2/2.5) Tariff system and complexity related to fiscal legislation received the lowest scores with 3.5.

The respondent in the category "other" ranked safety and security of loading & unloading as very good (rated with 1) - in this field it can be said that there is no need for further improvement. The duration; infrastructure quality; regulations/behaviours in the port and cooperation with various stakeholders (port operators, tariffs) received the second best score (rated with 2). The category tariff system was rated with 4, so there is room for improvement. The category fiscal legislation was ranked with 5 and can be named as the worst evaluated category for loading & unloading.

All three port user categories indicated the same areas with the greatest potential of improvement (tariff system and complexity related to fiscal legislation for loading & unloading).

Table 14: Loading & unloading (including special and heavy lift cargo) (Ennshafen port)

Category	terminal operator	cargo shipper/ owner	other
administrative handling (e.g. required documents)	3	2	3
safety and security	2	1.5	1
duration	3	2	2
infrastructure quality	2	1.5	2
tariff system	4	3.5	4
complexity related to fiscal legislation	4	3.5	5

regulations/behaviors in the port	2	2.5	2
cooperation with various stakeholders (port operators, Tariffs)	2	2	2

Source: National report – Austria

Table 15: Loading & unloading (including special and heavy lift cargo) (port of Vienna)

Category	terminal operator	forwarding companies
administrative handling (e.g. required documents)	1	2
safety and security	1	1
duration	1	3
infrastructure quality	1	2
tariff system	1	3
complexity related to fiscal legislation	1	4
regulations/behaviors in the port	1	2
cooperation with various stakeholders (port operators, Tariffs)	1	2

Source: National report – Austria

According to the data in **Error! Reference source not found.**15, the terminal operators, which have their activities in the port of Vienna, are very satisfied with all processes, and did not indicate much space for improvement. All categories mentioned for the loading & unloading including special sized and weighted goods are ranked with 1. In contrast to this, the forwarding companies see some room for improvement in connection with the loading & unloading process except for the safety and security. They also ranked the administrative handling; the infrastructure quality; the regulations/behaviours in the port and the cooperation with various stakeholders as almost adequate. The duration of the loading & unloading process and the tariff system was ranked with 3 by the forwarding companies. This means that there is room for improvement from their point of view. The category complexity related to fiscal legislation was rated with 4 from the forwarding companies, so there is potential for improvement in this area.

In conclusion, it can be said that the port users of both evaluated ports indicate that the tariff system and the complexity related to fiscal legislation in connection of loading & unloading including special sized and weighted goods have the highest level for improvement.

Hungary

Loading and unloading (including heavy cargo) was examined in many dimensions. Speed of this service is excellent (rated 4.8/5), safety, and quality are also rated to 4.6 in ports under the survey. Fiscal and commercial legislations were rated 4.3 out of 5 by port users, which are still representing non-complicated systems. Tariffs and administrative procedures were rated the lowest among the different criteria, but still good enough (rated 4.1/5 and 4.0/5).

Unfortunately, not in all cases were the average scores provided in the national reports, thus hindering the task of standardizing the conclusions.

The general assessment is a positive one in Romania, with an average assessment regarding tariffs and mentioning a need for improvement with regard to the collaboration between institutions.

The administrative procedures although considered generally easy in Romania and Bulgaria, received average appreciations in Croatia and Austria. In Hungary they were rated the lowest, however received a good score.

In Austria, the main identified issues revolved around the tariff system and the complexity related to fiscal legislation in connection to loading & unloading including special sized and weighted goods.

In Croatia, all of the dimensions subject to research related to loading and unloading received moderate assessments.

In the case of Bulgaria, apart from a few exceptions, the port users are rather positive towards the loading and unloading processes. Improvements were mentioned with regard to the legislation and collaboration between institutions in order to improve the port sector's image.

No specific issues were raised in the case of Hungary, with all dimensions receiving good scores.

To sum up, the specific issues related to loading and unloading identified in the national reports seem to gravitate around fiscal legislations, tariffs and administrative procedures.

5.2.3. Storage and warehousing

Regarding the storage and warehousing several criteria were observed:

- administrative procedures in ports;
- availability;
- quality;
- tariffs;
- fiscal legislation conditions;
- commercial legislation/ rules/ practices

Romania

In the analysed ports there are adequate storage and warehousing facilities, many of which have been built lately. It is important to emphasize the tendency to increase the storage capacity of grain in the Port of Constanta, further projects of new silos being in progress.

There was highlighted the legal framework specific to the Port of Constanta for storage of transit goods regarding the reduced customs formalities and costs.

Storage facilities are available for all types of cargo. However, there still are port users who believe that these facilities should be further developed.

Most of the port users have implemented a quality management system certified by a body of wide recognition in the field of transport. In addition, they have integrated this system with other management systems based on international standards, such as ISO 22000 (Food Safety Management), as is the case of port operators involved in grain handling or ISO 14001 (Environmental Management) OHSAS 18001 (Occupational Health and Safety Management) or even ISO 27001 (Information Security Management), as examples of freight forwarders.

The existent commercial practices based on international rules are used, which, together with the existing legislative framework, create the conditions for effective relations and a balanced competitive environment.

There is a high level of expectation for improving the legislative fiscal framework in the sense of increasing predictability.

Port user tariffs are negotiated between the parties and are established in a competitive economic environment.

The main part of the storage services are related to transit cargo. Usually there is available a free storage period for goods handled by the port operator.

Bulgaria

ADM Logistics did not answer to this question. Hermes Lind did not assess the Fiscal and Commercial legislation. The different assessment scales are analyzed according to the latest version of the questionnaire.

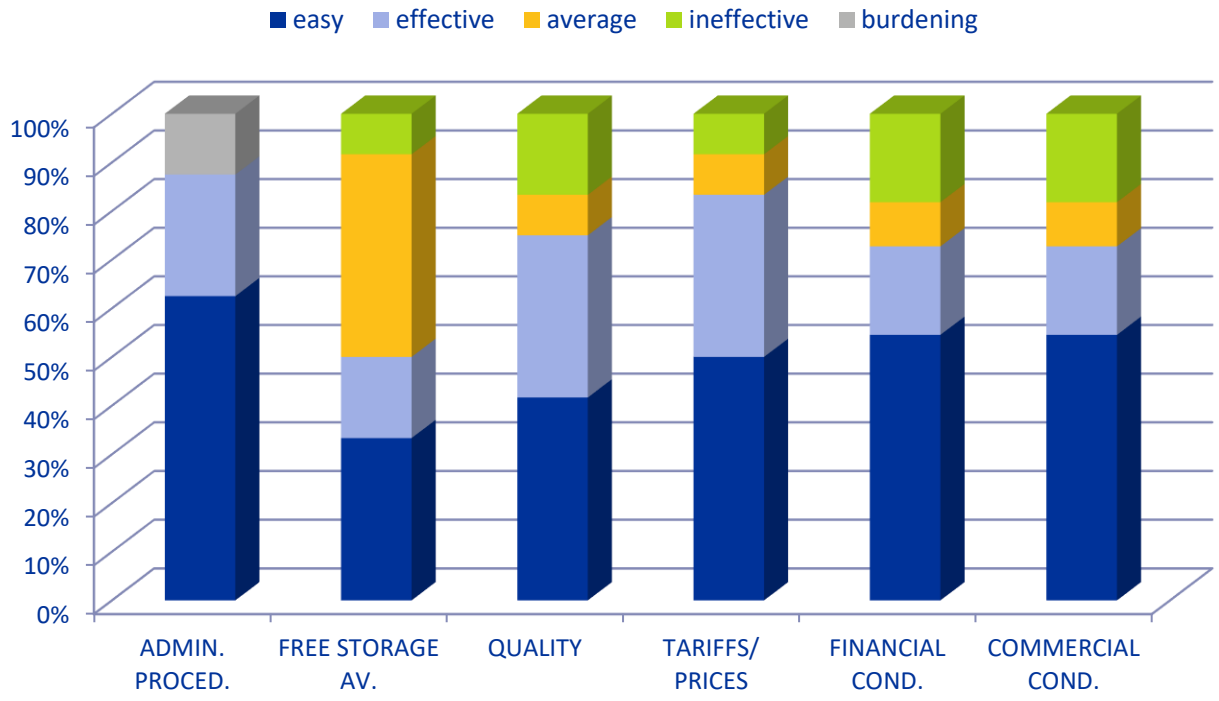
With 8 answers on point 1 **Administrative procedures** in port, 80 % are grouped in the positive scale with scores "1"and "2" (easy, effective).

The **Availability** of free storage turns out with small percentage of positive answers (40 % for scores 1 and 2). The average assessment prevails, which shows that the storage area is either not enough as a whole or there is a lack of storage area for particular goods. The port operators did not assess positively this criterion themselves, which proves the need of better organization of storage and warehousing and building of new storage areas, mostly for grain and goods that need closed storage.

The **Quality** of storage received 9 easy and effective assessments. Scores "3" and "4" were set by 3 of the respondents – Rubicon Shipping, Despred AD Ruse and Andreea Shipping and Trading ltd.

The **Tariffs** for storage and warehousing are generally assessed positively (10 responses with score 1 and 2) and two scores as average and not effective.

Figure 32: **Assessment of criteria relevant to storage and warehousing in ports (Bulgaria)**



Source: National report – Bulgaria

The assessments of **Fiscal and Commercial legislation** vary depending on the activity and the experience of the respondents.

The following comments were received in connection with established storage problems:

Port Invest ltd: difficulties arise during long-term keeping of cargo stored in open and closed warehouses.

Donau Transit: If the free storage term period is exceeded, the storage is charged retrospectively for that period.

Despred AD Ruse: the closed storage area is not enough.

Croatia

After filled survey related to the port processes of storage and warehousing, port operators provided their opinion that all processes could be summed up with average level of difficulty as moderately effective.

Austria

Ennshafen port:

The availability of storage and warehousing was similarly ranked by the different port user categories (table 16). The tariff system and the complexity related to fiscal legislation of storage and warehousing received the lowest scores with 4 and 5 and therefore this categories have the greatest potential for improvement in the Ennshafen port.

Table 16: Storage and warehousing (Ennshafen port)

Category	terminal operator	cargo shipper/ owner	other
administrative handling (e.g. required documents)	3	3	3
availability	2	2	3
infrastructure quality	2	2	2
tariff system	4	4	4
complexity related to fiscal legislation	4	4	5
regulations/behaviours in the port	2	2	3

Source: National report - Austria

Port of Vienna:

Table 17: Storage and warehousing (port of Vienna)

Category	terminal operator	forwarding companies
administrative handling (e.g. required documents)	1	2
availability	1	3
infrastructure quality	1	2
tariff system	1	3

complexity related to fiscal legislation	1	4
regulations/behaviours in the port	1	2

Source: National report - Austria

The terminal operators in the port of Vienna are again very satisfied with all processes in connection with storage and warehousing (table 17). They do not have any suggestions for improvement concerning the processes connected to storage and warehousing. They mentioned as well that they are very satisfied with the high security level and the long opening hours.

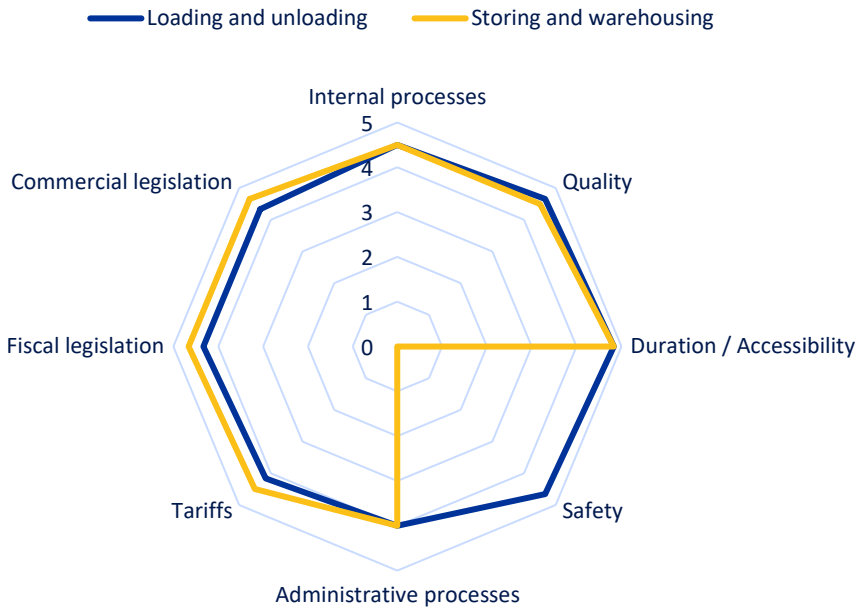
The forwarding companies see potential for improvement especially in the context of complexity related to fiscal legislation (ranked with 4). Availability and the tariff system of storage and warehousing facilities was rated with 3, which can be identified as average. The categories administrative handling; infrastructure quality and regulations/behaviours in the port in connection with storage and warehousing was ranked best in this context by the forwarding companies.

Hungary

Storage and warehousing was examined according to many criteria too. Accessibility of storage facilities is excellent (rated 4.8/5) in ports under the survey. Fiscal and commercial legislations related to this feature are almost perfect (rated 4.6/5). Tariffs, Internal processes and Quality were rated as the second least preferred dimension of storage and warehousing, but these criteria still received an average of 4.5 out of maximum 5. Administrative processes were rated the lowest to 4/5, which is still acceptable.

Specific issues are overcomplicated tariffs, high prices regarding railways and ports which might limit traffic on IWW.

Figure 33*: *Assessment of Loading and unloading and Storage and warehousing in ports under the survey (Hungary)



Source: National report - Hungary

Unfortunately, not in all cases were the average scores provided in the national reports, thus hindering the task of standardizing the conclusions.

Storage and warehousing seem to be evaluated in all dimensions from the questionnaire as above the average.

In Romania and Bulgaria with regard to availability there is room for improvement. Another issue which was revealed for Bulgaria relates to the varying fiscal and commercial legislation.

For Austria, there were mentioned the tariffs (Ennshafen) as well as the complexity of the fiscal legislation.

In Hungary, the tariffs seem to represent the most sensitive issue.

For Croatia, the responses indicated an average assessment.

5.2.4. Notice Process – (e.g. receiver, notify, port operator)

Romania

The notification process is effective, but an information system to be used is expected to improve this process.

Bulgaria

ADM Logistics did not respond to this question.

The Notice process in the river ports has a positive assessment.

Complexity of the procedure receives 58 % easy scores and 17 % effective scores. The average scores are also 17 % and only one respondent set not effective score to this criterion.

The **Duration** of the process has 83 % positive scores (6 easy and 4 effective). One respondent considers the duration average and one – not effective.

Extremely negative assessments as difficult were not received. There are no described problems by the respondents.

Croatia

According to survey, the notification process is moderately effective and most of the information is provided electronically. Within platform for monitoring of vessels on the berth, exchange of information between competent authorities is enabled. Nevertheless, a new information system is needed to improve notification process that will enable exchange information not only to competent authorities but also to others interested parties that are closely connected with the port services providing.

Austria

The communication plays an important role especially in the area of logistics. The work in a port (transport and handling) is executed by various stakeholders and for this reason, it requires good communication among all involved stakeholders to deal with the different tasks

and to guarantee smooth transhipment of goods.[24] The communication was evaluated by the categories intensity and complexity.

Ennshafen port:

Table 18: Communication with port administration (Ennshafen port)

Category	terminal operator	cargo shipper/ owner	other
intensity	2	2.5	1
complexity of the procedure	2	2.5	1

Source: National report - Austria

According to the table above, all respondents (terminal operator, cargo shipper, cargo owner, "other") rated the intensity as well as the complexity of communication as adequate.

Port of Vienna:

Table 19: Communication with port administration (port of Vienna)

Category	terminal operator
intensity	3
complexity of the procedure	1

Source: National report - Austria

This category was only ranked by the terminal operators. As can be observed in **Error! Reference source not found.**the intensity was classified with 3 and the complexity was ranked with 1, so referring to the terminal operators there is a need for improvement concerning the intensity.

Hungary

Average rate *notice process* received under this survey is 4.8 regarding both duration and complexity on a 5-scale, where 1 is very slow and complex, unclear and 5 stands for quick

[24]National report – Austria, source: Research Gate, The importance of communication for the maintenance of health and safety in work operations in ports available under https://www.researchgate.net/publication/315927788_The_importance_of_communication_for_the_maintenance_of_health_and_safety_in_work_operations_in_ports (18.12.2017]

and easy service provision. It means, port users found this feature fast enough and clear. No specific issues were mentioned.

Both *duration* and *complexity* of the process were rated 1×4 and 5×5 (and irrelevant for one respondent).

The notification process was generally evaluated as effective by the respondents in the five countries, and no specific issues were revealed.

5.2.5. Berth Allocating & Port Acceptance Process

Romania

Allocation of operating docks is based on the draft and depending on the storage of the goods on the port platform. The process is simple and effective.

Bulgaria

Berth allocation is a process managed by the port operator, taking into account the ships under processing, the availability of connection with rail or road transport, the order of submission of documents and the judgment of the responsible staff. The assessments of this process are mostly positive.

Croatia

After the announcement of ship arrival is received, the centre for traffic management directs vessel to the berth that is previously allocated by port administrator according to received announcement of ship arrival. According to the survey feedback from the port operators process of berth allocation and port acceptance is considered between very and moderately effective. Results of the survey are presented on the figure 12, while on figure 13 present average results for effectiveness based on all port operators that participated in the survey.

Austria

The Berth Allocation Problem (BAP) is one of the well-known tactical logistic problems in the optimization of the container terminals transport process. The challenges are finding an optimal berth assignment to vessels and to adjust vessel arrivals to preselected time

windows. The objective is to maximize berth capacity and to minimize waiting time for vessels in port.[25]

Ennshafen port:

Concerning the berth allocating & port acceptance process only the terminal operators and cargo shippers, cargo owners evaluated this process. Both classified the two categories as rather adequate (rated with 2).

Port of Vienna:

Regarding to the survey only the terminal operators answered this question and ranked this category with 1, which means that the process is very satisfying.

Hungary

Average rate *berth allocating & port acceptance process* received under this survey is 4.6 regarding the *duration* and 5 regarding the *complexity* in Hungarian Danube ports on a 5-scale, where 1 is very slow and complex, unclear and 5 stands for quick and easy service providing. It means, that port users find this feature fast enough and absolutely clear and manageable. No specific issues were mentioned.

Duration was rated 1×4, 5×5, (and irrelevant for one respondent).

Complexity of the process was rated 6×5 (and irrelevant for one respondent).

The berth allocating & port acceptance process is generally regarded as simple and effective and there were not raised any specific issues.

5.2.6. Survey Process

Romania

Most of the goods handled in the Danube ports are subjected to a quantitative and qualitative survey. This process is a complex one, but is not one that reduces the efficiency of inland waterway transport.

Bulgaria

[25]National report – Austria, source: available under https://ac.els-cdn.com/S2351978915011750/1-s2.0-S2351978915011750-main.pdf?_tid=8bb6e502-e3f4-11e7-afcf-00000aab0f6b&acdnat=1513602691_b5ebb273b54de69d32a79625aacd5e4d (14.12.2017)

Typically, the (draft) survey is performed to determine the amount of bulk cargo in the ship by a particular technology. Companies working in the field of the break bulk cargo (machines, metals, equipment, etc.) should not have problems in this field.

ADM Logistics cannot provide information about the survey process because of the short term of exploitation of port ADM Silistra. Currently the port operator and port terminal Ruse free zone, Holleman Bulgaria ltd, Hermes Lind state that they do not have difficulties with the survey process in the port.

Despred AD Ruse assesses the survey process in port terminal Ruse-East as not effective with high duration and complexity of the procedure.

Croatia

Survey process applied on the vessels, as well as on the transshipment goods which is considered from the port operators as moderately effective.

Related to the duration of the survey process port operators emphasized as weaknesses a lack of official staff especially Border Police and Customs.

Austria

No answers were provided.

Hungary

Port users found controlling – also known as *survey process* – fast and clear enough. Average rate this feature received in the framework of the questionnaire is 4 both in terms of duration and complexity. No specific issues were mentioned.

Both *duration* and *complexity* of the process were rated 1×1, 1×4, 3×5 (and irrelevant for two respondents).

Generally, the survey process did not raise particular issues. An exception is provided by the terminal Ruse-East, regarded by one respondent as not effective with a high duration and complexity of the procedure.

5.2.7. Ro-Ro services (loading and unloading of trucks, cars and other special vehicles and rolling stocks to and from ships)

Romania

Ro-Ro services are not very developed in the Romanian Danube ports. They are considered as having a high level of complexity.

Bulgaria

In total, 7 of the respondents did not answer this question as ro-ro services are not relevant to their activity. These are: Port Invest ltd. (port Lom), Hermes Lind ltd (forwarder of grain and other break bulk), Free zone Ruse (there is no ro-ro terminal), ADM Sillistra, Port Svishtov West and the forwarders Despred AD Ruse and Donau Transit ltd.

Only Rubicon Shipping puts average score to the complexity of the procedure of Ro-Ro services.

Croatia

It is not possible to provide results of the survey for the Ro-Ro services because this service is not available that is this question is not applicable for the Port of Vukovar. Port of Vukovar does not provide Ro-Ro services and to be more precise there is not Ro-Ro ramp although some port operators provide loading services of working machines (combine/harvester) with port crane. Port operators pointed out as disadvantage lack of the Ro-Ro ramp in the Port.

Austria

Both ports, which were the focus of this survey, have a Ro-Ro ramp. Using Ro-Ro services loading and unloading take little time, because the cargo is simply driven on and off board. The most important types of goods transported in this way include passenger cars, construction and agricultural machinery, articulated vehicles and semi-trailers ("floating road") as well as heavy cargo and oversized goods.[26]

The Ro-Ro services were evaluated by respondents in terms of duration of the process and the complexity.

Ennshafen port:

Only the terminal operators and cargo shippers/cargo owners evaluated this process. Both of them ranked the two categories with 3, which indicates that there is room for improvement concerning the Ro-Ro Services.

[26] National report – Austria, viadonau, types of vessels available under http://www.viadonau.org/en/economy/the-danube-transport-axis/types-of-vessels/

Port of Vienna:

There was no response to this question by port users in the port of Vienna.

Hungary

Ro-Ro services are not applicable at most of the ports. This feature is available only at the Freeport of Budapest and Port of Baja, but both responding port operators from Budapest and from Baja, stated this service is irrelevant for them.

In most cases, the Ro-Ro services are either not available, nor considered relevant. Only the terminal operators and cargo shippers/cargo owners in Ennshafen port answered these questions and their input indicated an average assessment.

5.2.8. Port maneuvering process

Romania

The maneuvering process in the port was rated as having a relatively low complexity level by port users. Sometimes there are challenges in the maneuvering process only because of the bad weather.

Bulgaria

Port Svishtov West AD did not respond to the question.

The answers of PC Ruse, port terminal Ruse free zone, port terminal Lom, Werta ltd, Andreea Shipping and Trading ltd and Holleman Bulgaria ltd show that their experts do not have difficulties performing the administrative processes connected with port manoeuvring process.

The forwarding companies Hermes Lind ltd., Rubicon Shipping ltd. and Donau transit ltd. put average score to the duration of the manoeuvring process in ports.

Despred AD Ruse considers the manoeuvring process in port terminal Ruse – East as not effective with high duration and complexity of the procedure.

Croatia

Port manoeuvring process is considered effective and having relatively low level of difficulty.

Austria

Ennshafen port:

Concerning the port manoeuvring process only the terminal operators and cargo shippers/ cargo owners evaluated this process. Both classified the two categories as rather adequate (rated with 2).

Port of Vienna:

There was no response to this question by port users in the port of Vienna.

Hungary

Port users declare *port manoeuvring* as a more complex process than those above, because it is highly affected by infrastructural conditions. The *duration* of *manoeuvring processes* differs from 2 to 5. The average rate this feature received is 3.6 regarding duration and 4.2 regarding its complexity. This means, manoeuvring is the hardest process to manage in Hungarian Danube ports.

Main difficulties considering port manoeuvring process are the followings:

- the lack of space, width of navigable routes is not allowing vessels to turn;
- the lack of permanent tugs or pusher crafts for carrying barges.

Generally, port manoeuvring is credited with low complexity in Romania, Croatia, Austria (Ennshafen port). In Bulgaria, some of the respondents indicated an average duration, while one respondent considered the manoeuvring process in port terminal Ruse – East as not effective, with high duration and complexity of the procedure. Particular issues regarding duration and especially complexity were mentioned for Hungary, due to reasons such as the lack of space since the width of navigable routes is not allowing vessels to turn and the lack of permanent tugs or pusher crafts for carrying barges.

5.2.9. Ship to ship Transhipment

Romania

The cargo transhipment is particularly applicable in Constanta Port where goods are taken from barges and loaded into seagoing ships.

The process is considered effective and having a relatively low level of difficulty, as was evaluated by two thirds of the users involved in the study.

Bulgaria

Four of the respondents did not answer to this question – Free zone Ruse, DF Istar AD (Svishtov), Hermes Lind ltd. and ADM Logistics (Silistra).

Despred AD Ruse is negative in its assessments again, giving score of 4 – not effective to the duration and complexity of the procedure of transhipment. Depsred makes the following comment: transhipment is only possible at appropriate levels of the Danube River.

All the other respondents assess this process as easy and effective, which shows rather positive attitude towards ship-to-ship transhipment.

Croatia

Usually transhipment process from ship to ship is not proved in the Port of Vukovar. Exception is only one port operator that has been providing this service and the process is considered very effective and having low level of difficulty. Mostly, the process is carried out during the extremely low water level when is necessary to unload cargo from barge to barge.

Austria

The respondents of the survey could not provide information on this point which may indicate that the respondents included in this survey do not perform ship-to-ship transhipment.

Hungary

Ship to ship transhipment is not applicable at most of the ports. Where this feature *is* available, it is excellent, as it was rated to 5 (on a 5-scale, where 5 stands for the best) by both respondents having it. No specific issues were mentioned.

Ship to ship transhipment seems not to be applicable in many from the ports under survey. As a particular issue for Bulgaria, it was mentioned that transhipment is only possible at appropriate levels of the Danube River. It is however, particularly applicable in Constanta Port, and the process is considered effective and having a relatively low level of difficulty.

5.2.10. Audit

Romania

The audit and inspection of ships is carried out in Romania by the Naval Authority, which is the enforcing agency for all national, European and International legislation.

The ship inspections are organized in the Port of Constanta according to International procedures (Port State Control, Flag State Control) and in all other ports in accordance with European and national practices.

The DANRiSS project is under implementation, financed under INTERREG V-A Programme (Cross-Border Cooperation Romania-Bulgaria), which has as main objective the harmonization of ship inspection between Romanian and Bulgarian maritime administrations.

The inspections frequency is established based on ship risk profile. When the Paris Memorandum of Understanding (MoU) is applicable (e.g. the Port of Constanta) for each ship in the information system a ship risk profile is attributed in accordance with Annex 7 of the Paris MoU text.

This ship risk profile determines the ship's priority for inspection, the interval between its inspections and the scope of the inspection. Ships are assigned high, standard or low risks. This is based on generic and historic parameters.

A ship's risk profile is recalculated daily taking into account changes in the more dynamic parameters such as age, the 36-month history and company performance. Recalculation also occurs after every inspection.

Ship-owners may check their own ship risks using the calculators on the Paris MoU website[27].

A similar system is planned to be introduced through the DANRiSS project for the Danube ports.

Bulgaria

This one and the following questions deal with procedures related to the operation of ships.

To the question about the frequency of the vessel audit 9 of the respondents did not provide answers: Port Svishtov West, ADM Silistra, Hermes Lind, DF Istar, Donau Transit, Despred AD Ruse, Holleman Bulgaria, Rubicon Shipping and Werta ltd.

The received answers are:

a) Once a year – 3 answers;

[27] National report – Romania, www.parismou.org

b) More than once a year – 1 answer (once in 3 – 4 month);

c) Once in 3 years – no such response

d) Other – no such response

According to PC Ruse the vessels are audited once per year by the relevant administration in respect of the permission to sail.

So far, the practice in port terminal Ruse free zone shows that the vessels are audited once per year by the relevant administration in respect of the ship certificate.

In port terminal Lom vessels are also audited once per year by the relevant administration in respect of the permission to sail.

In its response Andreea Shipping and Trading ltd points out that the frequency the vessels audit by the relevant administration is done at least once per 3-4 months.

Croatia

A vessel may operate with certain navigation limits and be used for designated purpose or stay on inland waterways if it complies with conditions of technical rules for the certification of inland navigation vessels. Ability for navigation is confirmed within certification that is by issuing of certificate for navigation ability. The Ministry of the Sea, Transport and Infrastructure via Technical Supervisory Committee issues the certificate. In Croatia technical supervisory committee is a Croatian Register of Ships who is authorized to provide audit for the inland vessels. Audits for the vessels is usually done once in a year as a periodical audit or it could be done more than once in a year only in exceptional cases as an extraordinary audit of the vessel.

Besides the Croatian Register of Ships, inspection supervision for the vessels is allowed to be done by the navigation safety inspector from the Ministry of the Sea, Transport and Infrastructure and from the Harbourmasters' Office as a territorial unit of the Ministry. Navigation safety inspector is authorized to provide inspection audit for the vessel to determine navigation ability of the vessel, especially to control vessels certificate and books. For such audits it is not strictly defined how often they should be done and those audits could be done more than once a year by a navigation safety inspector.

Austria

Ennshafen port:

Regarding the frequency of the vessel audit by the corresponding administration in the ports included in the survey, only the terminal operators and cargo shippers/cargo owners responded. The respondent indicated that this the process takes place once in a year.

Port of Vienna:

There was no response to this question by port users in the port of Vienna.

Hungary

At 33% of respondents corresponding authorities audit vessels once a month. One port user said audition is completed once a quarter of a year. In 50% of the cases, auditing vessels is not relevant.

Regarding the audit, the situation seems to differ significantly among the countries under survey. In Romania, the inspections frequency is established based on ship risk profile. In Bulgaria, some of the respondents indicated the frequency of once a year, while one respondent indicated that the audit is conducted every 3-4 months. In Croatia, the regular audit is conducted once a year. The same frequency was indicated in the case of Ennshafen port. In Hungary, there were indicated different frequencies – once a month, every other 3 months.

5.2.11. Documents

Romania

The number of documents presented when the vessel visits the ports under survey is considered to be still high. Half of the study participants declared that the ships must present more than 10 documents to the Romanian authorities at each port call.

For the Port of Constanta, the Convention on Facilitation of International Maritime Traffic (FAL Convention) is applicable.

Bulgaria

On the question about the number of documents presented when the vessel visits the port, only three of the respondents provided their answers and the results are as follows:

a. Less than 5 – no responses;
b. Between 5 and 10 – 3 responses;
c. Between 10 and 15 – no responses;

d. Other – no responses;

e. Not relevant/not responded – 10.

PC Ruse and Holleman Bulgaria ltd point out that when a vessel visits a port, it should present between 5 and 10 documents to the relevant authorities.

Andreea Shipping and Trading ltd states that during the visit of the vessel to the port of Ruse - East, port authorities request approximately 6-8 documents from the vessels.

Croatia

The number of documents that must be submitted to the competent authority is slightly high and the number of documents is between 5 and 10. Those documents are obligatory for submission to the competent authorities such as Border Police, Customs Office, Harbor Masters Office and Port Authority.

Austria

Ennshafen port:

Concerning the documents which are necessary when a vessel visit a port in Austria the general response was that the number is less than 5. This is in accordance with the answer by the port authority.

Port of Vienna:

There was no response to this question by port users in the port of Vienna.

Hungary

The two most important among these papers are the *River way bill* and the *Cargo Manifest*. The average number of required documents when a vessel visits a port in Hungary is 6. The most common answers mentioned were:

- River way bill
- Cargo manifest
- Customs documents
- Tonnage certificate
- Navigation certificate
- Report for the port

Besides, there are other documents that are not obligated to present in certain ports if not relevant:

- Load compartment inspection (LCI)
- NOR – Notice of Readiness
- Time sheet for laytime
- Statement of facts
- Mate's receipt
- Cargo Plan
- Draft survey report
- Loading/Discharging sheet
- Sealing report
- Master's report
- T2L
- Commercial (Custom) invoice
- Phytosanitary or Veterinary certificate
- Weight certificate
- Quality and condition certificates
- Analysis Certificates
- Invoice of port

Regarding the documents presented when the vessel visits the port the respondents indicated different numbers of such documents. In Romania, the indicated number is above 10, while in Bulgaria and Croatia it varies between 5 and 10. In Austria the number is less than 5, while in Hungary the average number of documents is 6.

5.2.12 Complexity of procedures

Romania

The port users taking part in the survey mentioned as countries with the most complex administrative procedure: Russia, Ukraine and Romania.

Bulgaria

The ship agent Andreea Shipping and Trading ltd states that it has difficulties working with the Romanian institutions. As specific reasons it stated: control requirements are not

updated, slow reaction, a lack of prompt processing by the border police and customs, and sometimes by the Capitania.

Donau Transit ltd. states that it has most difficulties with the administrative procedures in Ukraine.

The other 11 respondents did not answer to the question.

Croatia

Feedback gathered from the survey for this topic refers on the Hungary and Serbia. Reason for Hungary to be mentioned is because it is a country with most complex administrative procedures laid down at the cross-border point at Mohacs where vessels stay too long because of border control procedures. It reflects on the Port of Vukovar directly because vessels can't be on time in Port and this is also the situation for passenger vessels.

Serbia is also mentioned as a county with very complex administrative procedures. The situation is that for every vessel that comes from or transits through Serbia and then comes to Port of Vukovar has to be applied a long and complicated border control due to fact that vessel did not come from an EU country and it automatically has to submit more documents for the competent authorities.

It should be also noted that feedback related to the complexity of procedures came from port´s agents who express their opinion regarding the administrative procedures in other countries which influence on process for vessel´s that come to border control.

Austria

There was no response to this question by port users in the port of Vienna and the Ennshafen port.

Hungary

Every respondent had different points of view about the complexity of procedures. One of the six respondents noted, since they are dealing with cargo trade in the European Union, there are no differences among the member states or country-specific difficulties they face. A port user trading out of the EU as well, could declare that in Serbia they need to be mooring a lot when crossing the border. Some has no experience out of Hungary, one stated, Hungary has the most complex procedures, and one rejected answering.

The countries with the most complex administrative procedures that were mentioned by the Romanian respondents were: Russia, Ukraine and Romania. The Bulgaria respondents

mentioned Romania as well as Ukraine. The Croatian respondents mentioned Hungary and Serbia. The Hungarian respondents indicated Serbia as well as Hungary.

5.2.13. Electronic exchange of information

Romania

The electronic exchange of information with the relevant institutions in the ports under survey is considered very important by the port users. More than 90% of them declared that they send their information in electronic format to relevant institutions.

Anyhow, they mentioned the lack of electronic exchange information systems among institutions and port users, needed to reduce the time and resources to deliver documents and avoid filling mistakes.

Bulgaria

Three respondents did not provide information whether they exchange information electronically with the relevant institutions in the ports. Eight of the respondents use electronic exchange of information with the institutions and two do not.

Port terminal Ruse – free zone and Rubicon Shipping ltd. does not exchange electronically information with the relevant institutions in the ports.

Port users, which use electronic exchanges, facilitate and shorten the time for the complete processing of a vessel from its mooring to its exit and obtaining a permit for sailing.

Croatia

All port operators covered by the survey declared that they use electronic exchange of information with competent authorities and consider that way of communication as very useful and fastest. Mainly, exchange of information is conducted via e-mail and also by electronic system that is used for the monitoring of the port traffic, which provides possibilities for exchanging information between port users and competent authorities.

Austria

Some respondents from both ports indicated that they use electronic exchange of information with other stakeholders in the port. In the Ennshafen port, terminal operators, cargo shipper/cargo owner and others use electronic exchange of information with other stakeholders. In the port of Vienna, forwarding companies indicated that they do not use

electronic exchange of information with other stakeholders. In contrast, terminal operators indicated that they use electronic exchange of information.

Hungary

83,3% of the respondents exchange information electronically with the relevant institutions in the ports.

The results revealed that most of the respondents use the electronic exchange of information with relevant institutions in the ports, and it generally facilitates and reduces the time of processing the vessel from mooring to exit.

5.2.14. Statistical and other data

Romania

According to Romanian legislation[28], port operators are required to communicate to the port authority the limits of their tariffs, operating rates and statistical data related to cargo handled.

Port authorities have the obligation to centralize and publish annually data related to port traffic statistics.

A large number of users from the ports under survey (81%) declared that they communicate statistical data to authorities.

Bulgaria

According to the Law on Statistics and according to Ordinance No 919 of 08.12.2000 on the collection of statistical information about the activities of the port operators and the port and port facilities owners in the Republic of Bulgaria, any port operator carrying out port operations on the territory of the Republic of Bulgaria is obliged to submit statistical information to the official statistical information body for the country for the carried goods and passengers on inland waterways. All other respondents are not legally obliged to submit statistical information about the cargo handled. The received responses to this questions are as follows:

- Yes - 7

[28] National report – Romania, Ordinance no. 22 adopted on 29th January 1999 on ports administration and port services

- No - 4
- Not responded - 2

As a port operator, PC Ruse is legally obliged to submit monthly statistical data for the cargo handled to EAMA. The operator also submits the data to all other relevant institutions.

Port terminal Svishtov – Sviloza submits electronically statistical information about the cargo handled to the body of statistics in the Republic of Bulgaria, monthly in real time.

Port terminal Ruse – free zone also submits electronically statistical and other data to the relevant institutions.

Almost all of the port terminals in the Bulgarian section of the Danube, which responded to the questionnaire, submit statistical and other data to the relevant institutions electronically.

The forwarding companies are not legally obliged to submit statistical data to the National Statistical Institute about the cargo handled.

Holleman Bulgaria submits electronically various data to the relevant institutions. Donau Transit ltd does not submit electronically statistical and other data to the relevant institutions.

Andreea Shipping and Trading ltd submits electronically statistical and other data to the relevant institutions.

Croatia

According to survey results all port users use electronically exchange of statistic and other data with the corresponding administrations and it is considered that this way of information exchange is very useful and quickest.

According to the Croatian legislations Port Authority is obligated to make annually compiled report about the activities of the port operators where all data collected from the port operators are combined.

Furthermore, electronical system which is used for monitoring of the port traffic, also enables exchange of data related to the border control of the vessel such as crew and passengers list.

Austria

Concerning this question, all respondents of the survey (terminal operators, cargo shipper/cargo owner and "others") deliver electronically statistical and/or other data to port authority.

Hungary

All the respondents mentioned they do send statistical and other data to the corresponding administration.

To sum up, most of the respondents in the five countries declared that they communicate statistical data to the authorities.

5.2.15. Paper copies of the electronic data

Romania

Even if the port users declared that they are using electronic means to communicate with port-related institutions, 80% of users taking part in the survey are still keeping and/or sending paper copies of the documents.

Bulgaria

The use of paper copies of the electronic data is as follows:

- Yes – 8;
- No – 3;
- Not responded – 2 (Despred AD Ruse, ADM Silistra)

DF Istar AD, PC Ruse, Port invest ltd., Svishtov – Sviloza and Free zone Ruse keep paper copies of the electronic data.

Forwarding companies Donau Transit, Holleman Bulgaria and Andreea Shipping and Trading also confirm that they keep paper copies of the electronic data.

Rubicon Shipping and Hermes Lind do not submit and do not keep copies of electronic data.

Although, the submission of statistical and other data to the respective administration electronically, the paper copies of the data also continue to be used in parallel.

Croatia

Despite to the fact that all port operators use electronic information exchange, survey shows us that all of them still use paper copies for the data that they had sent electronically.

Austria

The port users in the Ennshafen port noted that they use paper copies from the electronically send data.

In contrast, the port users from the port of Vienna (terminal operators and forwarding companies) mentioned that they do not have any paper copies of the electronic data.

Hungary

50-50% is the proportion of port operators creating paper copies of electronic data and of those respondents who do not.

Although, the port users declared in a large majority that they use electronic means to communicate with port-related institutions, most of them still keep and/or send paper copies of the documents. In Hungary only 50% of the respondents declared that they use also paper copies. The port users from the port of Vienna stated that they do not have any paper copies of the electronically submitted data.

5.2.16. Meetings with relevant institutions

Romania

There are meetings of the port stakeholders with the relevant institutions in the ports, but not on a regular basis.

Such meetings are organized when changes are planned in port legislation, procedures or other practices.

In the Port of Constanta, some port users such as the port operators are organized into business associations which are very active in their communication with the port authority and other institutions.

Bulgaria

Frequent meetings with the relevant institutions (Customs, EAMA, Border police, etc.) have only 50% of respondents (5). The other 50% do not have the practice of having meetings with the institutions.

- Yes – 5
- No – 5
- Not responded – 3 (PC Ruse, Port Invest ltd., ADM Silistra).

Andreea Shipping and Trading ltd. Is one of the companies, which answers that it has no regular meetings with the competent institutions, related to port activities. They state that meetings with these institutions are only held, when major changes in the circumstances occur. During the rest of the time, the respondents adapt on in the process of the changes made by the responsible institutions.

Croatia

Survey showed that 75% port operators have meetings with relevant institutions, while 25% state that do not have such meetings. Meetings with relevant institutions are not organized on the regularly basis but when is needed to resolve some problems such meetings are organized.

In addition to daily communication between all port participants, the Ordinance on the Order in Port provides the opportunity to organize a joint meeting for all competent authorities for the purpose of organizing and conducting more efficient port administration processes.

Austria

All of the respondents pointed out that they have meetings on a regular basis with other relevant stakeholders (customs, border control etc.).

This meetings takes place quarterly, except in the case if problems appear, they take place immediately. It can be concluded that all port users indicated that it is very important to have continuous contact with other stakeholders and to exchange all relevant information.

Hungary

66.7% of the respondents hold meetings with relevant institutions in the port in order to make flow of information easier, fluent and quicker. They do so since they need information on a daily basis, or to make border-crossing procedures faster.

While in Austria, all respondents indicated they have meetings on a regular basis with relevant stakeholders, in the case of the other countries, although such meetings do take place, they do not seems to be conducted on a regular basis. In the Port of Constanta, the port operators are organized into business associations and these associations are very active in their communication with the port authority and other institutions. In Bulgaria, meetings are organized when considered necessary due to relevant and major changes.

5.2.17. Information considered useless

Romania

Most of the information required by the port institutions is considered by port users as relevant, but the duplication of efforts in sending the same information in electronic format and then on paper copies is considered useless.

The documents required by institutions annually for authorization is considered ineffective, since a part of such documents are already available to these institutions, so they have the evidence of the validity of documents.

Bulgaria

The following answers were received to the question "if there is information, which the users send to the relevant institutions and consider useless":

- Answer "Yes" – 1;
- Answer "No" – 9;
- Not responded – 3 (ADM Silistra, Port Invest ltd., Werta ltd.)

69 % of the respondents do not consider the information they submit to the institutions useless.

As useless information, Andreea Shipping and Trading ltd considers the completion of declarations of the quantity of all types of waste on board the vessels upon arrival at the port of Ruse.

Croatia

Port operators included in the survey considered that all information provided to the relevant institutions are useful.

Austria

There was no response to this question by port users in the port of Vienna and the Ennshafen port.

Hungary

83.3% of respondents stated, there are certain useless information required at border-crossing ports. The respondents did not go into details and no examples were mentioned.

Regarding the information considered useless, the Romanian respondents indicated that sending the same information electronically and in paper format is useless; also the documentation required annually for authorization may be considered useless as long as the respective documentation has been previously provided. In Bulgaria, as useless information were considered the completion of declarations of the quantity of all types of waste on board the vessels upon arrival at the port of Ruse. In the cases of the other three countries no other examples were provided.

5.2.18. Time consuming administrative procedures

Romania

The lack of staff in control institutions increases the time for checks. Vessel control carried out by Customs and the Border Police is very long in relation to the duties they have.

The procedure for obtaining the annual work license in port is considered another process to be improved.

Bulgaria

On the question about time consuming administrative procedures, 10 of the respondents did not provide answers. The other three respondents give the following answers:

- Customs procedures – 2 answers;
- The procedure for obtaining certificate for operation of the port – 1 answer;
- the organization of work process – 1 answer.

Customs formalities are highlighted by experts at Hermes Lindt as most time consuming administrative procedures. The same difficulties are pointed out by Donau Transit ltd.

Free zone Ruse considers the procedure of obtaining new certificate for operational suitability of the port as the most time consuming.

The comment of PC Ruse about the organization of work process is not very clear. Probably /but not confirmed/ it concerns the division of responsibilities between employees of the organization.

Croatia

Most of port operators included in survey considered two administrative procedures as most time consuming.

One of them is approval for the vessel docking out of the cross-border point. Usually, this procedure is applied for passenger vessels that dock at the passenger terminal out of the port and out of cross-border point.

The other time consuming administrative procedure is related to vessel control that is control of the crew and passengers on board as well as of the cargo on the vessel. Furthermore, the procedure of the vessel control is conducted by the Border Police, Customs and Harbor Masters.

Austria

There was no response to this question by port users in the port of Vienna and the Ennshafen port.

Hungary

Border-crossing processes, customs processes are the most time consuming administrative procedures, respondents declared. Although, half of the respondents stated there are no time-consuming procedures in Hungarian Danube ports.

As time consuming administrative procedures were indicated the checks conducted by control institutions (Romania), customs, procedures for obtaining certificates for operation of the port (Bulgaria), approval for vessel docking out of the cross-border point and vessel control by the Border police, Customs and Harbor Masters (Croatia), and border-crossing processes, customs processes (Hungary).

5.2.19. Administrative procedures that should be eliminated

Romania

The administrative procedures that the port users considered to be eliminated in the ports under survey are:

- The use of one-day port access card to be returned at the end of the day.
- The use of paper copies of the already communicated documents in electronic format.

Bulgaria

This question also has very low rate of feedback – 10 of the respondents did not provide their opinion.

Two of the respondents do not think that any procedures should be eliminated – Hermes Lind and Free zone Ruse.

The administrative processes that should be eliminated, according to Andreea Shipping and Trading ltd are:

- notification procedure for the declaration for temporary storage after its submission.
- Submission of General declaration for inbound cargo and general declaration for exit cargo – Bulgaria is not first border neither to Serbia nor to Ukraine, so it is pointless;
- Issuance of T2L and performing of inbound and exit revisions/ controls, when transporting Bulgarian cargo between two Bulgarian ports is totally meaningless and not in compliance with EU directives.

Croatia

All port users shared the opinion that none one of the administrative procedures should be eliminated.

Austria

Only one respondent (Ennshafen port) answered this question. The administrative procedures the port users considered to be eliminated in the ports are administrative process in connection with fees.

Hungary

Two thirds of the respondents said there are no such administrative procedures that ought to be eliminated in the ports. One respondent did not name these procedures and another one briefly mentioned the border-crossing procedures in general as those that are considered to be eliminated.

In Romania there were mentioned two procedures that should be eliminated - the use of one-day port access card to be returned at the end of the day and the use of paper copies of the already communicated documents in electronic format. In Bulgaria, there were mentioned: the notification procedure for the declaration for temporary storage after its

submission, the submission of General declaration for inbound cargo and general declaration for exit cargo – with Bulgaria not being the first border neither to Serbia nor to Ukraine, and Issuance of T2L and performing of inbound and exit revisions/ controls, when transporting Bulgarian cargo between two Bulgarian ports. For Austria, one respondent considered that administrative processes in connection with fees should be eliminated.

5.2.20 Suggestions /proposals/ comments

Romania

The comments and suggestions of the port users included the following:

- The need to train / retrain the port workers to be able to use the actual technologies;
- Lack of effective communication and flexibility;
- Need to improve road access to the Port of Constanta during the grain harvesting season and develop new parking areas;
- Availability of adequate and effective equipment;
- Restrictions for access to port operators due to security requirements (specific to the Port of Constanta) and bad communication with security companies lead to delays;
- Lack of harmonization of lunch break time.
- Use of an on-line portal for berth allocation and application for work permit.
- Improving of availability of data about ships operating in the port.

Bulgaria

None of the respondents made any suggestions, recommendations or comments on the questions asked.

Croatia

There were no suggestions, proposals or comments regarding the above mentioned administrative port processes.

Austria

The suggestions received from the port users in the Ennshafen port are in the field of infrastructure – not in the field of administration. Low-water zones have not been improved

or corrected in the future. This is an important political issue which is hushed up from the respondents' point of view.

There was no response to this question by port users in the port of Vienna.

Hungary

Most of the respondents among port operators have neither proposals, nor suggestions/comments concerning administrative processes in ports nor would they like to answer. There is only one constructive idea on how to contribute to smarter, faster, better harmonized administrative processes. A centralized IT gate system could make border crossing processes quicker and more standardized. However, the respondent did not want to go into details.

Most of the suggestions came from the Romanian respondents and include:

- The need to train / retrain the port workers to be able to use the actual technologies;
- Lack of effective communication and flexibility;
- Need to improve road access to the Port of Constanta during the grain harvesting season and develop new parking areas;
- Availability of adequate and effective equipment;
- Restrictions for access to port operators due to security requirements (specific to the Port of Constanta) and bad communication with security companies lead to delays;
- Lack of harmonization of lunch break time.
- Use of an on-line portal for berth allocation and application for work permit.
- Improving of availability of data about ships operating in the port.

The Hungarian respondents indicated a centralized IT gate system which could make border crossing processes quicker and more standardized.

5.2.21 Future directions for development and harmonization along the Danube ports

Romania

The future directions for development and harmonization along the Danube ports suggested by the port users in the ports under survey are:

- Technical inspection of ships by the authorities and mutual recognition of the results.
- Documents presented by the ship to the port authorities.
- Licenses of crew members.
- Communication between the involved institutions.

Bulgaria

The shipping agent Andreea Shipping and Trading ltd. is the only respondent, which provides recommendations on administrative port processes for the development and harmonization of Danube ports, mainly in the following directions:

- To connect the information systems of BulRIS and RoRIS, as well as the Romanian and Bulgarian Customs and Border Police, in order to eliminate duplication of documents like the general declarations;
- To ensure that Customs in different Bulgarian ports work under the same rules and regulations;
- To eliminate the differences in the required documents, whether the vessel is in the port of Ruse or in Lom.

Croatia

No one suggested their proposals regarding the future directions for development and harmonization along the Danube ports.

Austria

The suggestions received from the port users in the Ennshafen port are not in the field of administration.

Hungary

More than 50% of the respondents are familiar with such initiatives on harmonizing the Danube ports. In terms of future directions for development, ports suggested standardized, centralized electronic gate system for faster processes especially border-crossing processes.

5.2.22 Conclusions of national reports

Romania

In recent years, several European-funded projects have been implemented that have contributed to improving vessel operation processes in Danube ports and to enhancing environmental protection.

However, there is still a high level of expectation regarding the harmonization of practices along the Danube, so that port users can optimize their specific activities.

The area considered to have an increased need for improvement remains the procedure for inspection of the ship at arrival in port.

One of the ways to optimize port processes could be given by improving communication between port users and port administrations.

A better communication between institutions from different European countries could be a solution. Also, the use of information systems to allow for better reporting and monitoring is strictly needed.

Extending of the good practices from Danube ports to other similar ports is also a good opportunity for improvement.

Bulgaria

Based on the survey conducted, it can be summarized that the largest cargo flow is realized in Ruse, Svishtov and Lom. Thus, the highest amount of administrative procedures for cargo handling and ship visits is performed in these regions.

In connection with the administrative procedures, which are the main subject of this report, the following shortcomings have been identified:

- Need for facilitating the public procurement procedures and administrative burdens in carrying out the repair and maintenance of port infrastructure in ports of national importance;
- Need to increase the publicity and access to information on initiatives to harmonize port administrative procedures along the Danube;
- Need to facilitate the procedure for issuing a new permit/certificate for overall operation of the port ;

- To eliminate the need of paper copies of the data submitted simultaneously and electronically to the relevant competent authority;
- Reduce the burden of customs procedures;
- As useless is pointed out the use of declarations for the quantity of all types of waste on board when vessels arrive at the port of Ruse;
- To consider the issue of charging 20% VAT on the processing of all cargo along the river, including those originating outside the EU. As a comparison, in our seaports, all cargo is charged with zero-rate, including those originating in the EU;
- There is a proposal to eliminate the submission of notification of declaration for temporary storage after its submission;
- There is a proposal to eliminate the submission of general declarations, because Bulgaria is not first border neither to Serbia nor to Ukraine.

Port users, which are agents, freight forwarders, transport companies, etc. are direct customers of the port operators. Significant parts of the obtained assessments refer to the port of Ruse and in particular the port terminal Ruse – East. Thus, the assessments received are mainly relevant to the operators' activities as port service providers. The main port services provided by them are:

- Loading and unloading from/to ships, automobiles and railway transport means;
- Cargo storage;
- Maneuvering services;
- Power and water supply to vessels, etc.;

The main weaknesses concerning the port activities, which are identified in the survey are:

- lack of covered storage areas, not enough free warehouses, unsatisfactory storage quality of goods;

- difficulties arise when the goods are stored in open and closed warehouses for a long time;

- the achieved results by the various brigades are different in terms of loading and unloading standards;

- when the free-storage term period is exceeded, the storage is charged retrospectively for that period.

Croatia

Although the interest in participation was not big it could be concluded that port users considered all existing port administrative procedures moderately effective. Nevertheless, for some administrative procedures port users pointed out some problems: they are still considered certain processes as the effective. Processes as duration of the vessel control obtained by the relevant institutions port operators emphasize as a weaknesses and consequence of official staff deficiency - especially Police and Customs staff. But this procedure is still considered as moderately effective. Despite to the fact that they are obligated to submit between 5 to 10 documents when vessel arrive in the port, the procedure is still considered not too complex.

Since port users indicated there are no useless administrative procedures it could be concluded that cooperation between relevant institutions such as Border Police, Customs, Harbour Masters Offices, as well as Port Authority is on a good level of the cooperation. That is supported by the fact of daily communication between afore mentioned relevant institutions as well as organization of the joint meetings of all corresponding authorities with the purpose of organization and conduction more efficient port administration processes. Besides the above mentioned, in order to speed up implementation of the port processes information as well as other data is being exchanged electronically between institutions either via e-mails or electronic system for the port traffic monitoring.

To emphasize the differences between Danube ports in Croatia included in this survey is not applicably due to fact that that survey was conducted only for one Danube port in the Port of Vukovar. However, it could be mentioned that on the Croatian inland waterways there are four cargo ports (two on Sava, one on Drava and one on Danube). All those ports are considered as public ports and they are under the management of port authorities. As port authorities have been established as public institutions by a Government of Republic of Croatia same rules apply to them regarding the administrative procedures.

Austria

All in all, it can be said that the answers from the respondents in the port users' category are quite similar. Port users of both evaluated ports indicate the same administrative

processes such as “loading and unloading (including special and heavy lift cargo)” (4.2.2. in the national report) and “Storage and Warehousing” (4.2.3 in the national report) with the greatest potential for improvement (e.g. the tariff system and complexity related to fiscal legislation for these two processes may be improved).

The category, which are ranked best by all respondents, are safety and security. Concerning the other categories which were evaluated in this survey (communication with port administration; berth allocating & port acceptance process; loading & unloading; Ro-Ro services, loading and unloading of trucks, cars and other special vehicles and roll stocks to and from ships; port maneuvering process and transshipment) no great discrepancies between the Ennshafen port and the Port of Vienna were identified. All findings are mostly in the medium range (2-3), therefor it can be said that there is still room for improvement in all evaluated categories.

Concerning the current administrative processes there was only one difference between the respondents that is the port users from the port of Vienna (terminal operators and forwarding companies) mentioned that they do not have any paper copies of the electronic data in contrast to the port users of the Ennshafen port.

Hungary

Questionnaire on port administration for port operators was expected to be completed by trading companies (charterers), ship owners, and companies actually operating in ports as well as other stakeholders that are not on the side of administration entities, authorities and port management organizations covering and serving entire port ecosystems. Editors of questionnaire intended to map administrative difficulties, issues on similar topics but from different perspectives. However, answers to different questions are not only similar too, but pointing into a direction for development and harmonization along the Danube. Still, unfortunately, not much exact idea, clear requirement has been defined under the survey.

Considering logistic services in ports, respondents are rather satisfied. There are no underrated features and facilities at Hungarian Danube ports. Every port service is or close to perfect. Almost every feature is rated above 4.5 on scales where 5 is the best, but many services are missing in most ports (Ro-Ro, ship-to-ship transhipment, etc.)

As long as different dimensions of logistic services are not weighted, it is easy to rank them according to POPEI (**Port Performance Indicator System for the inland waterway ports)** efficiency or performance (it depends on what certain rates stand for) in this order:

(1) ship to ship – where applicable
(2) notice process
(3) berth allocation
(4) storage and warehousing
(5) loading and unloading
(6) survey process
(7) manoeuvring

Elimination of complexity of administration processes depends on companies whether they trade with EU or third countries. Answers vary a lot from irrelevant through domestic trading via trading with EU member states, to declaring Hungary and to declaring Serbia has the most complicated administration processes, especially regarding customs clearance when crossing borders.

The most divisive topic was the need of border-crossing procedures. Administration related to custom clearance and border-crossing are the most time-consuming, useless and considered necessary to be eliminated processes according to the respondents. Although, the main challenge is to set up a unified, centralized, and standardized administration system organically complemented and supported by IT/ICT background.

As regards future directions, half of respondents know such initiatives harmonizing processes in Danube ports. Concerning the suggestions respondents mentioned during the survey, most of the stakeholders had no comments at all, the rest emphasized again a jointly accepted and used IT gate system to make border-crossing procedures more fluent and standardized.