Comparative distances by rail

Port of Trieste

North European Ports

1st half throughput

2010

Containers (TEU) + 60%

Crude Oil + 95%

Passengers + 22%

Ro-Ro

2013

Containers (TEU)

Crude Oil

Passengers

Ro-Ro

Success factors

The Port of Trieste, an international hub for trade with Central and Eastern Europe, is ready to seize opportunities for economic growth and development thanks to:

- A special regime of free zones
- Natural depths of up to 18 metres
- Great ease of access for shipping
- Excellent road and rail links
- Regular ocean transportation services to and from China, India and the Far East provided by the world’s major shipping lines
- Efficient and sustainable port services (pilotage, anchorage, cargo handling)

For businesses
Located in the heart of Europe, at the intersection between shipping routes and the Baltic-Adriatic and Mediterranean TEN-T core network corridors, the Port of Trieste is an international hub for overland and sea trade with the dynamic market of Central and Eastern Europe. The intensification of trade and maritime traffic between the Far East and Europe and the eastward enlargement of the European Union have revived the importance of the Upper Adriatic, opening up new growth and development opportunities for Trieste. In this context, Trieste plays a decisive role in two separate supply chains: long-distance intercontinental maritime transportation and short-medium-distance intra-Mediterranean trade. The convergence of the TEN-T strategic axes of the “East Mediterranean Motorways of the Sea” with the Baltic-Adriatic and Mediterranean Corridors is resulting in the growth of intermodal services and the development of innovative solutions in the field of logistics and transportation.

Trieste is the terminus of regular direct ocean transportation services provided by the world’s main shipping lines to China, the Far East, Singapore and Malaysia, with stops in several other ports in the Mediterranean Basin (Albania, Slovenia, Croatia, Greece, Turkey, Egypt, Lebanon, Israel, etc.). More than 160 trains a month link Trieste to the manufacturing and industrial areas of North-East Italy and Central Europe, with different destinations, such as Germany, Austria, Czech Republic, Hungary, Switzerland and Luxembourg, to serve a developing and highly organised economic hinterland.

To reach the target markets in Central and Eastern Europe, highly specialised intermodal services have been developed, using direct trains organised by the company Alpe Adria S.p.A., a multi-client operator, which offers all-inclusive packages with guaranteed delivery and frequency. The Port of Trieste has an internal rail network (70 km of track) that connects with the national and international network and allows all the docks to be served by rail with the possibility of handling and forwarding freight trains directly at the various terminals, a direct junction and a flyover (within the Port) connect to the outside road system, which leads directly to the railway network, ensuring easy access to the national road network.

Deep waters up to 18 metres, great ease of access for shipping, excellent road and rail links and proximity to markets make the Port of Trieste an efficient and competitive destination. Trieste, a natural crossroads between East and West, intends to be Europe’s preferred point of access to the markets of the Far East. In fact, the Port of Trieste can offer a saving of five days sailing on routes between Europe and East Asia, compared with North European ports. For a fleet of 6,000 TEU container ships this translates into a saving of over USD 25 million a year in freight and fuel costs.

Competitive advantage in serving the markets of Central and Eastern Europe

Suez - Trieste distance 1,300 miles less than 3 days sailing*

Suez – North European Ports distance 3,500 miles more than 7 days sailing*

* Average speed 20 knots
**Description**

Port of Trieste

- **Port areas:** About 2.3 million sq.m, of which about 1.8 million sq.m of free zones.
- **Storage areas:** About 925,000 sq.m, of which about 500,000 sq.m under cover.
- **Length of docks:** 12 km.
- **Number of berths:** 58 for conventional ships, multi-purpose vessels, container ships, Ro-Ro ferries, chemical tankers, passenger ships etc.
- **Maximum depth:** 18 m.
- **Length of rail track:** 70 km.

**Approach**

- North Channel: for ships bound for or coming from the Old Free Zone, the Maritime Station, the New Free Zone, the Dockyard, the Timber Terminal and the ferries.
- South Channel: for tankers, ships bound for or coming from the industrial canal and ships that cannot use the North Channel for traffic reasons.

The different areas of the port are protected by a total of 4 breakwaters. Maritime traffic is monitored by the Trieste Harbour Master’s Office using a VTS (Vessel Traffic System).

**Pilotage**

- This is obligatory for ships entering and leaving the harbour and for movements within it, except those along the same quay without using machines and tugs.
- Ships up to 500 GRT and harbour service vessels are exempted.
- The captains of ships bound for the Port must contact the Pilots Station at least one hour beforehand on VHF channel 16.
- The harbour pilots’ corporation has nine pilots, three pilot boats and a computerised system to check the movement of shipping.

**Towage**

This service is provided by the company Tripmare S.r.l., which has six 5000 BHP tugs.

**Anchorages**

The roadstead of Trieste is divided into three anchorage areas:

- **Roadstead A:** Reserved for tankers.
- **Roadstead B:** Reserved for tankers and ships carrying dangerous goods.
- **Roadstead C:** Reserved for other ships.

**Technical Information**
Bunkering
The port has shore bunker depots with a capacity of 145,000 cu.m. The service is provided primarily by the company Giuliana Bunkeraggi S.p.A., which has a fleet of barges.

Ship supplies
These are available by contacting any shipping agency.

Water
This is supplied by the company Porto di Trieste Servizi S.p.a.

Cleaning of water expanses and port common parts
This service is provided by the company Porto di Trieste Servizi S.p.a.

Ship waste disposal
This service is provided by private companies.

Ship repairs
There are four dry docks; the maximum size is 295 x 56 x 12 m.

Maximum ship size
No limits on length and beam. The maximum draught is 18 m.

Radio
The Port of Trieste operates on the following VHF channels:

- Channel 18 (pilots and boatmen)
- Channel 17 (routine traffic)
- Channel 74 (services)
- Channel 16 (rescue)

Weather
The Bora (ENE) is the prevailing wind in the Trieste area during the coldest time of the year. The Libeccio (SW) rarely blows in summer. There are an average 20 days of fog a year, mainly concentrated in the winter months.

Tides
The maximum tidal range is about 0.85 m.

Business hours
The Port of Trieste is open 24 hours a day, 365 days a year.

Airport
The Airport for Friuli Venezia Giulia (in Ronchi dei Legionari) is 34 km from Trieste.
The European Commission has identified the project to establish a corridor linking the Adriatic and Baltic as one of the strategic priorities of the overall European Union.

The Baltic–Adriatic Corridor will run through Slovenia, a Schengen State, (Poland, Czech Republic, Slovakia, Austria and Italy) and connect more than 40 million people in Europe by linking the two ports of Gdansk and Trieste, thereby stimulating fresh economic growth throughout the territory covered by the corridor.

The Baltic–Adriatic Corridor is a key project for the revival of traffic between the ports of the Baltic and the Adriatic because it will facilitate the channelling of goods arriving from China through the Suez Canal to all of Central Europe. As far as the strategically positioned logistic terminus of Trieste is concerned, this long and important transport link between the city and Northern Europe will represent a major growth opportunity. Should some of the goods transported require further work during transit, this could start up a “piloted” flow of investments in a substrata of companies responsible for its transformation.

The Friuli Venezia Giulia region, of which Trieste is the capital, is now one of the few areas of the European Union transited by two major European rail routes.

The Mediterranean Corridor is a project for rail freight transport along a line running about 3000 km, through five EU countries: Spain, France, Italy, Slovenia and Hungary. The Corridor starts in southern Spain, runs through southern France and across the north of Italy along the high-speed, high-capacity Turin-Trieste line to arrive in Slovenia and head towards Hungary until reaching the Ukraine border. The route is the result of a southwards extension of European Priority Project 6 (Grenoble-Ukraine border railway). This new high-speed, high-capacity line will link Italy, France and Slovenia, while its future stretch will be joined to other European corridors. In particular, it will allow Trieste to be connected with the Baltic-Adriatic Corridor.
In the collective imagination, the Port of Trieste is linked to the international fame achieved in the first decade of the 19th century as the most important port in the Austro-Hungarian Empire, when the volumes of cargo handled ranked it as the 7th port in the world and the 2nd port in the Mediterranean after Marseille. This fortunate circumstance dated back to the beginning of the 19th century when the Emperor Charles VI of Austria proclaimed it as a “Free Port”. Since then until present the free port regime has remained a peculiar characteristic of the Port of Trieste.

In the second half of the 19th century, the rail link with Vienna turned the Port of Trieste into a primary point of transit, leading the Habsburg authorities to embark on the first major expansion of the port facilities resulting in the construction of the complex now known as the Old Port between 1868 and 1883 according to a design by Paul Talabot.

In response to the flourishing of trade with the Middle and Far East, following the opening of the Suez Canal in 1869, it was soon necessary to enlarge the port facilities even more. Initiated in the early 1900s, this project was mostly completed only in the 1920s and 1930s after Trieste was returned to Italy, thus giving birth to the New Port.

Overcoming the destruction wreaked by the Second World War, which had halved operational capacity, the Port recommenced its development by adapting to the new geopolitical environment. A quantum leap in the volume of traffic was made at the end of the 1960s, with the opening of the Transalpine Pipeline, and in the early 1970s, with the completion of the container terminal.

The Port later added new infrastructure to serve the needs of modern logistics, such as the multi-purpose terminal in the Old Port and the terminal for Ro-Ro vessels and ferries in Riva Traiana.

The start of the new century has seen strong, steady growth in intermodal rail services and in passenger traffic and leisure tourism (pleasure craft and cruises). This complex profile, comprising a mixture of historical factors, technical know-how and material resources, is the strong point on which the Port of Trieste can now rely to recover its traditional role and importance in the European Economic Area and the Mediterranean.
The Port of Trieste is one of the 23 Italian ports with a Port Authority. The Port Authorities are non-profit public bodies, with administrative, budgetary and financial autonomy, established under the reform of legislation concerning ports enacted in Italian Law 84 dated 28 January 1994. They have high status under public law and are subject to oversight by the Ministry of Infrastructure and Transport and the Ministry of Economy and Finance. The key management bodies of these authorities are the Chairman, the Port Committee, the Board of Statutory Auditors and the General Secretariat, which in Trieste’s case has a technical and operations office currently employing 94 staff.

The territorial jurisdiction of the Trieste Port Authority - as identified by the Ministry of Transport and Navigation’s Decree dated 6 April 1994, in implementation of art. 6, subsection 7 of Italian Law 84/94 - consists of public marine areas, the harbour works and the facing expanses of water, including the stretch of coast from Punta Ronco (Muggia) to the Bovedo stream (Barcola). The jurisdiction also includes five Free Zones: Old Free Zone, New Free Zone, Timber Terminal Free Zone, Mineral Oil Free Zone and Industrial Free Zone. The Free Port area of the Port of Trieste (meaning the total of all the Free Zones) is particularly extensive (1,765,000 sq.m out of a total port area of 2,304,000 sq.m).

The Port Authority has the primary task of directing, planning, coordinating, promoting and controlling port operations and other commercial and industrial activities in the port; it is also responsible for marine and non-marine maintenance of the common parts of the port area and for engaging and controlling providers of services of general interest to port users.

The 1994 reform has precluded Port Authorities from carrying out operational functions which have been transferred to private entities, and charged Port Authorities with the task of planning and coordinating port areas and services. These duties are carried out by preparing a Three Year Operating Plan, which defines the development strategies for port activities, and a Port Master Plan, which defines the intended use of the port area. The Port Authorities also issue permits for the performance of port operations (loading, unloading, transhipment, storage and general movement of goods) and any other material matters within the port and/or concessions of areas and docks to the terminal operators, on the basis of business plans and agreements. The Port Authorities also issue concessions under articles 36 et seq of the Code of Navigation (licences, formal agreements, permits, etc.); the Trieste Port Authority currently manages approximately 400 concession licences and 30 long-term formal agreements.

The financial resources of the Port Authorities consist of revenue from license fees for the concession of public areas and docks, from permit charges for the exercise of port operations, the sale of equipment, from taxes and inspection duties, from grants received from regional governments, local authorities and other public bodies and organisations, as well as miscellaneous income. The financial accounts of the Trieste Port Authority revealed a budget surplus of more than Euro 13 million at 31 December 2012, while the income statement closed with a net profit of Euro 10.5 million, about 60% more than the year before.
**Subsidiaries**

**Adriafer S.r.l.**  
Adriafer S.r.l. is a company set up by the Trieste Port Authority and wholly owned by the same, it carried out activities in 2004 and is a concessionaire from the Trieste Port Authority, as the sole operator permitted to move rail wagons and trains within the Port of Trieste, organising its operations in a “synergic” fashion with rail freight carriers and all the terminal operators within the Port.

The various manoeuvres of rolling stock are performed by the company’s teams of skilled workers (currently numbering 30) using suitable machinery and equipment, in particular three Henschel DHG 700 diesel locomotives and two digital (TOD) on-board control devices.

The company provided 366 days a year in intermodal supply on all the logistical import/export routes.

Adriafer S.r.l. moves ordinary and special rolling stock for all operators and terminal operators working within the Port, ensuring that convoys are collected and dispatched in the most efficient way in accordance with agreed timetables.

There are currently strong, positive signs of continued growth in volumes and rail traffic within the Port, ensuring that rail convoys are collected and dispatched in the most efficient way in accordance with agreed timetables.

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**Port di Trieste Servizi S.p.a.**

Port di Trieste Servizi is the multi-utility company responsible for managing certain services defined as “Services of general interest” relating to the Port and to technological innovation.

The company serves port users, the Port Authority itself, and the institutional bodies located within the Port of Trieste.

**Rail traffic in the Ile Free Zones**

<table>
<thead>
<tr>
<th>Year</th>
<th>Container freight wagons</th>
<th>Trailer freight wagons</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>26,034</td>
<td>13,694</td>
</tr>
<tr>
<td>2012</td>
<td>32,934</td>
<td>12,933</td>
</tr>
<tr>
<td>2013</td>
<td>30,500</td>
<td>11,500</td>
</tr>
<tr>
<td>% Increase 2012/2011</td>
<td>31.47%</td>
<td>-0.17%</td>
</tr>
<tr>
<td>% Increase 2013/2012</td>
<td>16.90%</td>
<td>-10.35%</td>
</tr>
</tbody>
</table>

**Trieste Terminal Passeggeri S.p.a.**

Trieste Terminal Passeggeri S.p.a. was set up in 2007 by the Trieste Port Authority, which subscribed to all the company’s share capital of €750,000. It is currently 60% owned by Trieste Adriatic Maritime Initiatives (TAMI) and 40% by the Trieste Port Authority.

The company has a 25-year concession running from 1 January 2008 to operate the Cruise Terminal, located at Molo Bersaglieri, near the central square of Piazza dell’Unità d’Italia, the Passenger Terminal on Pier IV and the Ferry Terminal at Berth 57 in the Port of Trieste. In addition, the company holds the concession in the car parks on Pier IV and along the Trieste waterfront.

Trieste Terminal Passeggeri S.p.a. is committed to the development of activities relating to passenger traffic in the Port of Trieste, in particular:

- **Cruises**
  - Super yachts / pleasure boats
  - Ferries and hydrofoils
- **Super yachts / pleasure boats**
  - Conferences, congresses and events
- **Public transport**
  - Waterfront and Pier IV car parks

**Alpe Adria S.p.A.**

Alpe Adria S.p.A. is a multimodal transport operator (MTD) that coordinates rail, road and sea carriers in order to organise and handle interregional transport of goods and passengers.

The company acts as a single interface towards the international operators involved, concentrating the services provided by all the international operators involved, and coordinates the services provided by all the international operators involved.

The company provides and develops, in return for payment, the “service of general interest” involving the management of marine passenger terminals and passenger support services (management of embarks and disembarks of passengers and goods, management of public lighting and local electricity distribution network, management of port technical systems including emergency services, management of IT infrastructure (telephones and data network) and applications for port users.)

**Port of Trieste Terminal Services**

Port of Trieste Services is the multi-utility company responsible for managing certain services defined as “Services of general interest” relating to the Port and to technological innovation.

The company serves port users, the Port Authority itself, and the institutional bodies located within the Port of Trieste.

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company runs a comprehensive network of links between North-East Italy and Central and Eastern Europe. It has strongly developed its business in intermodal container transport and combined road-rail transport (Ro-La), and is now in a position to apply its know-how to other sectors by expanding its operations into conventional transport.

Istituto di Cultura Marittimo Portuale di Trieste (ICMP) is an entity established by the Trieste Port Authority in 2009 with the following mission:

- to promote the cultural heritage available to the Trieste Port Authority, and allow the public to benefit;
- to carry out cultural initiatives and vocational training relating to the maritime-port field, with particular reference to personnel working in the Port of Trieste;
- to create a museum for the “Fecia di Cossato”, a Nazario Sauro class submarine, in accordance with the agreement between the Trieste Port Authority and the Italian Navy, ensuring its preservation and ap-

To achieve this mission, the Institute intends, among other things:

- to carry out a coordinated programme of work for the conservation, restoration and development of internationally and culturally significant state-owned property and industrial archaeological sites in the Old Port of Trieste;
- to raise awareness of the cultural heritage of the Port of Trieste through initiatives suited to the nature and structure of the area;
- to redevelop the hydraulic plant and electrical substation in the Old Port, designating them as an educational-means complex of national interest for the propagation of technical and scientific skills and knowledge, especially pertaining to the maritime sector;
- to design, plan and implement continuous training initiatives for port and maritime personnel, as well as providing guidance, career courses and training and development of maritime personnel;
- to organise and implement conference and exhibitions, seminars, audiovisual presentations, exhibitions and other cultural events.

The terminals of the Port of Trieste, managed by private operators under Italian Law 84/94, are located in the docks area of the Port and are equipped with modern technology for handling, transportation and storage of all types of traffic: containerised cargo, fruit and vegetables (potatoes, onions, oranges, nuts, etc.), coffee, grains, petrol, wines, spirits and chemical products, timber, dry and liquid bulk, crude and derivative products, etc. In addition to the terminal operators, several other companies operate in the Port of Trieste under permits to perform port services and operations, under art. 16, Italian Law 84/94, as well as the company charged with providing temporary staff, under art. 17, Italian Law 84/94.

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The terminal operators

General Cargo Terminal, Adria Terminal

Passenger Terminal, Pier II and Maritime Station

Ro-Ro Terminal, Riva Traiana
5. Samer Seaports & Terminals S.r.l. (http://www.samer.com)
1. Saipem S.p.a. (http://www.saipem.it)
2. C. Steinweg - G.M.T. S.r.l.

Coffee Terminal, Pier VII
11. Pacorini Silocaf S.r.l. (http://www.pacorini.it)

Ro-Ro Terminal, Berth 47–48
12. Trieste Intermodal Maritime Terminal (T.I.M.T.) S.r.l.

Container Terminal, Pier VII

Ferry Terminal, Berth 57
14. Trieste Terminal Passeggeri S.p.a. (http://www.triesteterminalpasseggeri.it)

Multipurpose Terminal, Timber Terminal
15. General Cargo Terminal S.p.a. (http://www.gcterminal.com)

Metals Terminal, Ironworks

Oil Terminal

Oil Products Terminal

Navigable Channel Terminal (cement, industrial products, chemicals, frozen goods)
20. Ortolan Mare S.r.l. (http://www.ortolancostruzioni.it)
23. Frigomar S.r.l. (http://www.frigomartrieste.com)

Oil Products Terminal, Aquilinia

General Cargo Terminal, Adria Terminal
2. C. Steinweg - G.M.T. S.r.l.
9. Multipurpose Terminal, Pier VI
   - Europa Multipurpose Terminals (EMT) S.r.l.

10. Grain Terminal, Pier VI
    - Grandi Molini Italiani S.p.a.
Shipbuilding in Trieste is identified with the history of the San Marco Dockyard - founded in 1853 - and developed continuously from the end of the Austro-Hungarian era. After a period of transition, the business is once again flourishing thanks to ship repairs and maintenance. Apart from a number of small shipyards, particularly for yachts, the Port of Trieste has four large dry docks, two of which owned by the company Diesel S.r.l. and two under concession to Fininvest S.p.A., which also has its headquarters in Trieste where it designs the cruise ships built at its Monfalcone shipyard.

Revival of the Old Free Zone and the Waterfront

The history of Trieste makes it a city with a clear cosmopolitan vocation, a strategically placed meeting point between East and West not only for trade but also for politics, culture and science. Already the home to prestigious international institutions, the city aims to boost its tertiary, office and financial services sectors, as well as activities involving research and development of innovative technologies, and is seeking to augment tourism, particularly in sectors related to the sea. The Port and tourism in Trieste are an inseparable pair: not only recreational boating, boasting a long tradition with the annual Barcolana regatta and extensive marina facilities (with more than 3,000 berths), but also the cruise industry, which is undergoing a crucial phase of development. Fitting into this context is the plan to redevelop the oldest of the free zones, the Old Free Zone, which has been included in the UNESCO list of World Heritage Sites as a unique example of industrial archaeology. It covers an area of more than 65 hectares on which a modern general cargo terminal (Adria Terminal), two basins to be redeveloped for recreational boating, and a hydrodynamic plant that powered cranes and hoists in the Old Port for over a century, coexist with many historic warehouses due for redevelopment as offices, museums, accommodation and for recreational tourism.

Shipyards and boating

Warehouse 26

With an area of 32,000 square metres and length of 344 metres, Warehouse 26 is the largest of all the buildings in the Old Port. A symbol of extraordinary historical and architectural worth, serving as a witness to the Habsburg-Trieste era, it is a cultural and architecturally forward-looking Trieste. During the celebration of the 150th anniversary of the Unification of Italy, Warehouse 26 hosted the Friuli Venezia Giulia Pavilion for the 54th edition of the Venice Biennale International Art Exhibition. The building is directed into eleven main areas and has four levels: a basement used as a cellar, a ground floor and three upper floors. The design is rectangular and consists of several linear buildings without facades, separated by a series of galleries.
Old Free Zone
65 ha
The Free Port of Trieste is unique in the Italian and EU legal system, above all because of the historical and political events surrounding its establishment and, more generally, those involving the territory of Trieste. Historically, first under the Austro-Hungarian Empire until 1918, and then under the Kingdom of Italy, the Port of Trieste has always enjoyed special privileges in organisational and legal terms, which have enhanced its status as a place of international trade in a strategic geographical area.

After the Second World War, the Free Port of Trieste was “internationalised” by the Peace Treaty between Italy and the victorious powers, signed in Paris on 10 February 1947 and, in particular, by articles 1-20 of Annex VIII “Instrument for the Free Port of Trieste” and articles 34 and 35 of Annex VI “Permanent Status of the Free Territory of Trieste”.

The primary instrument governing the legal regime of the Free Port of Trieste is Annex VIII to the 1947 Peace Treaty. References contained in the Annex to the Free Territory and its legislative and government bodies must be construed in the light of historical and political changes that took place after the signing of the 1947 Peace Treaty, namely the decision to dissolve the Free Territory and Italy’s subsequent assumption of international responsibility for the city and the Port of Trieste under the Memorandum of Understanding signed in London in 1954. Moreover, because of the change in circumstances, the Memorandum established that the Italian Government would maintain the Free Port of Trieste “in general accordance” with the provisions of Articles 1-20 of Annex VIII, thereby acknowledging that the provisions of Articles 21-26 of the Annex (for establishing international bodies for consultation, control and arbitration to ensure implementation of the Free Port legal regime) had lapsed due to the supervening impossibility of implementation. Articles 1-20 contain the fundamental principles of governance of the Free Port, serving as the general parameters of reference for the Italian State on which to enact appropriate legislation. Commissarial Decrees no. 29/1955 and no. 53/1956 contain important provisions in this regard, serving to establish special regulations in relation to the international obligations.

In general, the principles of Annex VIII are implemented in international agreements (such as those with Austria in 1955 and 1985, and with Hungary in 1988) for the use of the Free Port of Trieste, in legislation and other official regulations or acts concerning the mode of operation and administrative procedures for implementing the Free Port regime, which indeed, over time, need to be revised and improved for changes in traffic and the demands of trade. However, even the perimeter of the Free Zones must be able to be modified for changes in traffic, by, e.g., defining the areas subject to the Free Port regime, without prejudice to the overall supervision of the regime. The only restrictive measure to implementation is the presumption that such activities are consistent with the internationally guaranteed regime; in other words, the options applying to the Free Port of Trieste are strictly linked to compliance with the international obligation, especially if they are to be enforceable at European Union level.

The international role of the Free Port of Trieste, which currently includes five distinct Free Zones, three of which are dedicated to commercial activities (Old Free Zone, New Free Zone, Timber Terminal) and two used for industrial activities (Mineral Oils Free Zone, Zaule Channel Free Zone), is to “ensure that the port and the transit facilities of Trieste will be available for use on equal terms by all international trade in such manner as is customary in other free ports of the world” (art. 1, Annex VIII). The Free Port of Trieste is political territory of the Italian State. Italian and European Union laws cannot, however, restrict the freedoms relating to customs duties and operations guaranteed by the Peace Treaty and its instruments of implementation. The legal status of the Free Port of Trieste is essentially embodied in two regimes: unrestricted access and transit and customs clearance exemption.
With regard to unrestricted access to the port, article 79 establishes free movement of goods and services and freedom of access and of transit without any discrimination and without customs duties or charges other than those for services rendered (see articles 1, 5, 10, 14 of the Community Customs Code, articles 2, 6 and 7 of the Commissarial Decree 29/1955). The rules intended to promote international trade, as well as policies affecting European Free Zones, have enabled a more prosperous international trade in goods and services, and have ensured overall stability and transnational spirit. They are greatly appreciated by international operators, who are constantly seeking new ways to improve their efficiency through the use of technological advances.

Advantages of the Free Port of Trieste

- non-discriminatory right of entry of ships and cargo, irrespective of origin, destination, and status, with the possibility of applying for an additional period, free of duty, taxes, and other charges other than those incurred for the authorization for loading, unloading, transshipment, movement, and storage, and with no obligation to identify a customs destination for such cargo, which can be identified by the operator at a later date;
- prohibition on customs intervention (and thus customs control of goods entering and leaving the Free Zones, which takes place only at the free-zone crossing points) when loading and unloading goods, except for specific inspections under economic, health and public safety regulations (e.g., some goods, such as those containing narcotics, weapons, drugs, portable systems, must be placed in special warehouses supervised by Customs). Ordinary goods are treated as having customs destination, which means that every cargo, when it crosses the Free Zones, with the entry of all goods into the free zones representing an export transaction not subject to VAT.
- no time limit on the storage of goods
- no customs formalities to be completed as long as the goods stay in the Free Zones
- no customs duties to pay or to guarantee as long as the goods are in the Free Zones
- lower harbour dues than other ports
- simplified transit for commercial vehicles directed abroad that are in transit to/from the Port of Trieste
- simplified customs system for the transit of goods by air
- manipulation of goods permitted (e.g., grading, regularizing, labeling, sampling, destroying, reprocessing, etc.) as per the industrial transformation, completely free from any customs bonds
- application of the customs deferred payment scheme, whereby duties and taxes on goods imported into the EU market through the Free Zones can be paid as much as six months after the date of customs clearance or a partially low annual interest rate (10% of 6M Euribor)
- mixtures of every kind may be made within the bonded area between products subject to no indirect duties
- customs status of goods (foreign country, EU free circulation without payment of VAT, import, export, transit)
- operators can access other alternative treatments permitted by EU and/or national legislation (e.g., depository, VAT deposits), free of charge, with consequent compliance with the requirements of each party
- possibility of extending the Free Zones
- application of practices used in other free ports around the world

The system’s guidelines have been agreed with the customs authorities and other institutional bodies involved with the Port of Trieste, with technical working groups having been formed and are constantly active.

Free Zones, Free Trade Zones, Foreign Trade Zone, Free Port, Industrial Free Zones, Export Processing Zones, Export Zones, Free Zones, Special Economic Zones, Duty Free Zones, Enterprise Zones, Megazones, Technopoles, Technoparks. Free Zones are areas of the world’s map marked off in the 1960s and 1970s by the United Nations to foster development in the more underdeveloped countries. By the 1990s, there were nearly 400 Free Zones in the world, with growth over the last 20 years. From a handful of zones in the pioneer period, to 500 in the 1990s, 600+ in the 2000s, and over 1,500 today, Free Zones are now numerous enough to be considered a world phenomenon.

Of these, the Free Zones of the Port of Trieste are a unique case, a truly special case, unique in its characteristics, unique in its history, and unique in its geographical, administrative and political framework. The Free Zones of the Port of Trieste is an area of 200 hectares of land and water in the Port of Trieste, formulating an economic area for the provision of services and movements of goods and services in the Port of Trieste, and so maintaining the privileged regime of freedom for the Port of Trieste and national and EU Customs.

The Free Zones of the Port of Trieste represent an export transaction not subject to VAT, so no customs formalities or charges other than the customs duties and taxes on goods imported into the EU market through the Free Zones can be paid as much as six months after the date of customs clearance or a partially low annual interest rate (10% of 6M Euribor). Products subject to excise duty only pay the duties and taxes on goods imported into the EU market through the Free Zones, with the entry of all goods into the free zones representing an export transaction not subject to VAT.
## Shipping routes and destinations

### Regular shipping services 2013

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<th>NAME OF SERVICE</th>
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<th>SHIPPING AGENCY</th>
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### Ae 12

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Motorways of the Sea

Motorways of the Sea provide an alternative and often complementary solution to road freight and are designed to connect service, exceptions and exclusions by bridge, thus enhancing the importance of maritime transport.

This type of transport not only reduces traffic on roads and motorways, it also significantly reduces air pollution, saves on freight costs and, in many cases, on travel time, thanks to increasingly modern fleets and other facility aspects.

Motorways of the Sea are also based on the concept of intermodality, where goods are quickly unloaded and reloaded between different means of transport.

As described by Decision 884/2004 of the European Parliament and of the Council of 29 April 2004, “The trans-European network of motorways of the sea is intended to concentrate flows of traffic on sea-based logistical means in such a way as to improve existing maritime links or to establish new viable, regular and frequent maritime links for the transport of goods between Member States, so as to reduce road congestion and improve access to peripheral and island regions and States. Motorways of the Sea shall not exclude the combined transport of people and goods, provided that goods are predominant.”

Objectives of the Motorways of the Sea

The objectives of the Motorways of the Sea are:

- to improve existing maritime links between EU Member States;
- to implement new, convenient, regular and frequent services;
- to reduce road congestion;
- to improve access to peripheral islands, regions and States;
- to reduce environmental pollution.

South-West Europe

South-East Europe

Western Europe

Baltic States
Green corridor

The Green Corridor is an initiative aimed at strengthening and rationalising cooperation between Italy and Egypt in the agro-food industry. The objective is to increase exports of Egyptian fruit and vegetables to Italy and, through the latter, to Europe, and also to open up Egyptian markets to certain Italian fruit and vegetables. The idea of creating a “Corridor” between Egypt and Europe through Italy has originated from the need to satisfy growing European demand for fresh fruit and vegetables in the period when the European fruit and vegetables market does not have its own production for seasonal reasons.

Potatoes and onions are the main products arriving in Trieste after crossing the Green Corridor (Alexandria-Trieste), along with more perishable products like pomegranates and peppers, which are then distributed in Italy and the rest of Europe.

Information highway

With regard to IT infrastructure, the Port of Trieste is becoming competitive in an age when almost all loading documents travel ahead on the web. In fact, to allow the port facilities to receive modern types of traffic, work in the docks has become more highly automated and mechanised, and maritime and port activities are being increasingly synchronised with road and rail transport (intermodal systems and logistics), thanks to the introduction of the most technologically advanced innovations (like tracking and tracing) and user-friendly electronic devices to manage and coordinate the products transported. The Port has been equipped with broadband fibre-optic connectivity infrastructure that has recently been integrated with a high-speed Wi-Fi network.

Established partners

Austria, Germany and Turkey are all countries of great importance for the Trieste economy. Studies conducted by the University of Trieste have shown that about 30% of the cargo handled by the Port originates from or is bound for Austria. Other research has estimated at 3,500 TEUs per week the potential additional Austrian traffic that could be diverted from North European ports and directed to the Port of Trieste.

Turkey has established a strategic relationship with the Port of Trieste in the last decade, leading to the creation and development of what is now the Mediterranean’s most crowded “Motorway of the Sea.” Several Turkish shipping companies have started Ro-Ro ferry services between Trieste and ports such as Istanbul, Mersin, Ceyhan and Canakkale, producing around 5 million tons of traffic a year and hence a valuable source of cargo handling income for the Port.

About a third of the total trade between Europe and Turkey passes through the Port of Trieste, including the regular shipments of automotive components sent from Germany, France and Britain to assembly plants in Turkey.
Rail links and intermodal services

Rail services and links play a vital role in the logistics chain centring around the Port. In fact, Trieste is the main port in Southern Europe in terms of freight transport by rail, with 70 km of rail serving all the docks and making it possible to assemble freight trains directly in the various terminals. In addition to container transport by rail, unaccompanied combined transport is another important type of intermodal service now available in the Port, whereby only unaccompanied semi-trailers are loaded onto trains.

Rail services are available with different frequencies to Austria, Germany, Hungary, Czech Republic, Slovakia and Switzerland; the destinations for domestic connections are Milan Certosa and Padua Bologna.

Intermodal services are provided by Adriafer S.r.l., which organises intermodal, combined transport for various goods in the so-called last mile of the port area, and Alpe Adria S.p.a., a multimodal transport operator which manages various forms of conventional transport in a single logistical cycle.

The meeting of the strategic TEN-T “Motorways of the Sea” with the European Baltic-Adriatic and Mediterranean rail corridors offers an extremely exciting prospect for Trieste. The existing transport terminuses in the Friuli-Venezia Giulia region (Ports of Trieste, Monfalcone and Porto Nogaro, freight terminals in Gorizia and Fernetti and logistics centre in Cervignano) or those planned (logistics platform in Trieste) will fit perfectly into this strategic axis of European development. Furthermore, Trieste is the main crossroad of the Mediterranean Corridor and the Baltic-Adriatic Corridor, which will reach the Polish port of Gdansk via Austria and the Czech Republic. Three intermodal land axes will complement Project no. 21 (“Motorway of the Sea of South-East Europe”) which aims to develop Ro-Ro and ferry services with Albania, Greece, Turkey and other countries bordering the Mediterranean, thereby connecting the Adriatic Sea to the Ionian Sea and the Eastern Mediterranean.

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<td>Luxembourg</td>
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<td>Containers</td>
<td>Gingen</td>
<td>8 arrivals 8 departures</td>
</tr>
<tr>
<td>Trailers or containers</td>
<td>Bettembourg</td>
<td>28 arrivals 28 departures</td>
</tr>
<tr>
<td>Trailers or containers</td>
<td>Ludwigshafen</td>
<td>16 arrivals 16 departures</td>
</tr>
<tr>
<td>Trailers or containers</td>
<td>Cologne</td>
<td>64 arrivals 64 departures</td>
</tr>
<tr>
<td>Trailers or containers</td>
<td>Ostrava</td>
<td>14 arrivals 14 departures</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>164 arrivals 164 departures</td>
</tr>
</tbody>
</table>
### Traffic

<table>
<thead>
<tr>
<th>TYPE OF TRAFFIC</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Containers [t]</td>
<td>3,119,293</td>
<td>2,865,660</td>
<td>3,093,692</td>
<td>4,644,396</td>
<td>5,374,226</td>
<td>26,471,092</td>
</tr>
<tr>
<td>Dry bulk [t]</td>
<td>1,805,533</td>
<td>1,541,324</td>
<td>1,634,998</td>
<td>1,720,095</td>
<td>1,778,471</td>
<td>8,362,498</td>
</tr>
<tr>
<td>Liquid bulk [t]</td>
<td>37,268,454</td>
<td>35,025,452</td>
<td>36,208,303</td>
<td>35,229,638</td>
<td>35,967,976</td>
<td>185,739,874</td>
</tr>
<tr>
<td>Ro-Ro traffic [t]</td>
<td>5,487,951</td>
<td>4,793,007</td>
<td>5,409,502</td>
<td>5,617,086</td>
<td>5,362,349</td>
<td>26,415,585</td>
</tr>
<tr>
<td>TOTAL</td>
<td>47,681,231</td>
<td>44,216,393</td>
<td>46,585,495</td>
<td>47,412,127</td>
<td>48,483,322</td>
<td>243,729,372</td>
</tr>
<tr>
<td>containers (TEU)</td>
<td>335,943</td>
<td>276,957</td>
<td>281,643</td>
<td>393,186</td>
<td>408,023</td>
<td>1,609,634</td>
</tr>
<tr>
<td>passengers</td>
<td>153,312</td>
<td>71,964</td>
<td>67,035</td>
<td>56,973</td>
<td>98,647</td>
<td>465,929</td>
</tr>
<tr>
<td>cruise passengers</td>
<td>87,740</td>
<td>6,403</td>
<td>15,332</td>
<td>20,183</td>
<td>69,652</td>
<td>326,912</td>
</tr>
<tr>
<td>TOTAL</td>
<td>44,276,107</td>
<td>44,393,322</td>
<td>47,634,188</td>
<td>48,237,877</td>
<td>49,206,870</td>
<td>243,729,372</td>
</tr>
</tbody>
</table>

### Arrival/Departure

<table>
<thead>
<tr>
<th>TYPE OF TRAFFIC</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goods arriving by sea (t)</td>
<td>43,765,522</td>
<td>40,977,876</td>
<td>42,287,676</td>
<td>42,071,737</td>
<td>42,744,980</td>
</tr>
<tr>
<td>Goods leaving by sea (t)</td>
<td>4,962,774</td>
<td>4,416,324</td>
<td>5,396,522</td>
<td>6,166,240</td>
<td>6,479,895</td>
</tr>
<tr>
<td>TOTAL</td>
<td>48,276,107</td>
<td>44,393,322</td>
<td>47,634,188</td>
<td>48,237,877</td>
<td>49,206,870</td>
</tr>
</tbody>
</table>
North Adriatic Ports Association (NAPA)

The Chairmen of the Ports of Trieste, Venice, Ravenna, Koper (Slovenia) and Rijeka (Croatia) established the North Adriatic Ports Association (NAPA) on 1 March 2010. By founding the association, the North Adriatic ports formally agreed to cooperate to create appropriate synergies when carrying out promotional activities at many different levels (regional, national, European, international) in order:

a) to have the North Adriatic ports assume the role as European logistics platform for traffic from the Far East to Europe and to and from Central and Eastern Europe;
b) to promote coordinated planning of the development of road, rail, maritime, IT and telecommunications infrastructure at the service of the North Adriatic;
c) to determine the constraints and infrastructure problems that are hindering the development of the North Adriatic Ports;
d) to develop joint lobbying of national and European governments and other public entities in order to simplify and harmonise regulations, timing and procedures governing port operations, including customs and health procedures, and all other procedures relating to ships and cargo involved in transport through the ports, taking into account the specific international and national laws relating to free ports and free zones.

In particular, the Association promotes initiatives and actions to develop the following areas:

a) tangible and intangible maritime and shore relationships with the foreland and hinterland of the ports, in order to expand their respective target markets, specific attention is given to the railway sector, seen as an essential way to improve competitiveness between port systems as well as a key part of the sustainable development of land transport in Italy and Europe;
b) cruise and passenger services;
c) environmental protection and quality;
d) safety and security;
e) training;
f) ITC services applied to the port sector.

North Adriatic cargo throughput 2010-2012

<table>
<thead>
<tr>
<th>Port</th>
<th>TEU 2010</th>
<th>TEU 2012</th>
<th>% change 2012-2010</th>
<th>% change 2011-2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ravenna</td>
<td>183,577</td>
<td>207,500</td>
<td>+1.30%</td>
<td>-3.64%</td>
</tr>
<tr>
<td>Trieste</td>
<td>281,643</td>
<td>408,023</td>
<td>+44.87%</td>
<td>+3.77%</td>
</tr>
<tr>
<td>Venice</td>
<td>393,913</td>
<td>429,893</td>
<td>+9.1%</td>
<td>-6.21%</td>
</tr>
<tr>
<td>Koper</td>
<td>476,731</td>
<td>572,263</td>
<td>+20.03%</td>
<td>-2.89%</td>
</tr>
<tr>
<td>Rijeka</td>
<td>137,048</td>
<td>178,837</td>
<td>+30.49%</td>
<td>+18.69%</td>
</tr>
</tbody>
</table>

The Port Authority of Ravenna ceased to be a member of NAPA in January 2013.

North Adriatic Ports Association (NAPA)
Development and investment opportunities

### Three Year Operating Plan

The principal infrastructure investments contained in the Three Year Operating Plan are listed below:

<table>
<thead>
<tr>
<th>PROJECT</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logistics Platform - Lot 1 - construction of a new terminal connected to the Trieste motorway link road and the rail network outside the port with a dock approx. 600 m. in length and 14 m. depths.</td>
<td>Euro 132 million</td>
</tr>
<tr>
<td>Logistics Platform - Lot 2 - continuation of the above work with creation of equipped yards and new docks, from which the future Pier VIII will extend.</td>
<td>Euro 184.5 million</td>
</tr>
<tr>
<td>Campo Marzio Rail Terminal, a new terminal next to the port boundary, consisting of an outer 4-track rail ramp served by a rail-mounted gantry crane, for more efficient management of the Port’s rail transport needs.</td>
<td>Euro 10 million</td>
</tr>
<tr>
<td>Total planned expenditure</td>
<td>Euro 326.5 million</td>
</tr>
</tbody>
</table>

### Situation in 2013 (at 30 June)

The Port’s planning department has managed the following investment expenditure in the first half of 2013 alone:

- Award of public works contracts: Euro 3,734,660.34
- Engineering services: Euro 739,059.69
- Other services:
  - European projects: Euro 23,046.76
  - General services: Euro 3,041,497.14
  - Environmental remediation: Euro 345,393.39
- Total: Euro 3,409,937.39

Logistics platform: Euro 132,430,000.00
Grand total: Euro 140,283,657.42
The Port Master Plan was approved by the Port Committee on 19 May 2009 after obtaining the necessary agreements from the municipalities concerned, namely Trieste and Muggia.

Once adopted, the Plan was submitted to the Board of Public Works, to obtain the opinion required by Italian Law 84/94 (article 5, subsection 3). The Board of Public Works issued a favourable opinion on 21 May 2010 after making a series of requests to the Port Authority for additional information and clarifications.

The Integrated Strategic Environmental Impact Assessment is currently in progress, in accordance with art. 6, subsection 3-ter of Italian Legislative Decree 152/2006.

The main works planned are summarised as follows:

<table>
<thead>
<tr>
<th>PROJECTS</th>
<th>FINANCING</th>
<th>EXPECTED COMPLETION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logistical Platform Lot 1</td>
<td>Euro 132 million</td>
<td>2020</td>
</tr>
</tbody>
</table>

The Port of Trieste is currently developing the Logistics Platform, which involves the creation of docks in the zone between the Timber Terminal and the Servola Ironworks for a total area of 247,000 sq.m of which 140,000 sq.m currently occupied by water.

The project is divided into three lots:

- **Lot 1**
  - Value of Lot 1: Euro 132 million
  - Project financing:
    - Euro 70 million in funds from Trieste Port Authority
    - Euro 32 million under Finance Act ICEP resolution 32/2006
    - Euro 30 million in private funding

  **Lot 1 technical data:**
  - Total area: 12.27 ha
  - Length of docks: 480 m
  - Area of dock wall: 6.52 ha
  - Volume land reclaimed: 24,884 m³
  - Volume sea reclaimed: 10,456 m³

Following the approval of the project, the Interministerial Committee for Economic Planning (COSPE), the Port Authority has initiated the tender process for the construction and management of the work.

A total of 9 expressions of interest have been received from private enterprises.

The Port Master Plan is in the process of being approved.
SAFETY AND ENVIRONMENT

14 May 2012: Memorandum of Understanding between the Region, the Province, the City, the Port Authority, EZIT (Ente Zona Industriale di Trieste), union representatives and other organisations with the aim of agreeing a plan to remediate the industrial area of the Servola

25 May 2012: Programme Agreement for “Environmental rehabilitation for re-industrialisation and infrastructure development of areas included in the ‘Trieste Site of National Interest’” between the Ministry of the Environment, the Region, the Province, the municipalities of Trieste and Msgrigia, the Port Authority and EZIT

Programme funding:
- National Programme of Environmental Remediation and Restoration (“Ministerial Decreto 468/2001”) – Funding granted to the Friuli Venezia Giulia Region: Euro 10,832,000.00
- Ministry of Environment funding for Trieste Port Authority: Euro 2,600,000.00

8 August 2012: approval of the Senato Conference of the new environmental characterisation plan of the marine coastal area and its execution

23 May 2013: Partnership Agreement with the Sustainable Development Foundation for the development of an advanced, certified environmental management system for port activities

6 August 2013: approval at the Service Conference of the new environmental characterisation plan of the marine and coastal area and its execution

14 June 2013: European funding of Euro 2,899,236.34 for soil remediation of the former Esso site, including adoption of permanent safety measures under Italian Legislative Decree 152/06

Agreement of financial issues: Full-time secondment to the Port of workers’ representatives for production site safety, as implementation of the Safety Agreement signed in 2008 at the Trieste Prefecture

Implementation of Port Security Plan

Access control project Region/Insiel (Euro 1,000,000)

Environmental protection

With regard to remediation of contaminated sites, the Port Authority of Trieste has been identified in the Programme Agreement as the contaminated Site of National Interest of Trieste as the body responsible for the characterisation of the marine part of the site, extending over an area of 15,000,000 sq.m. The Authority has been granted Euro 3,200,000.00 in funding for this purpose. The characterisation is in progress.

With regard to contaminated land sites, the Port Authority has been granted Euro 2,900,000.00 in European funding for remediation of the former Esso refinery, on the basis of a project already approved by the Ministry of the Environment.

EMAS environmental certification (eco-management and audit scheme)

The Port Authority, assisted by the Sustainable Development Foundation, chaired by Edo Ronchi, has initiated procedures to join the EU environmental certification system known as EMAS (Eco-Management and Audit Scheme) which will allow it to assess and improve its environmental performance. The introduction of an advanced, certified environmental management system for its activities will ensure the best sustainable development of port traffic, in line with its overall mission.