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OVERVIEW OF TRANSPORT IN LATIN AMERICA AND THE CARIBBEAN IN THE YEAR 2000

INTEGRATED TRANSPORT SYSTEMS: A BREATH OF FRESH AIR

The outlook for inter-modal transport in Latin America at the end of 1999 was a complex one, fraught with uncertainties and unresolved issues. On the other hand, things came into sharper focus in the year 2000 and several major projects were launched. This annual summary focuses on three of these initiatives, which tend to underscore the need for an increasing integration of services, infrastructure and information technologies.

The positive outlook for the transport sector in 2001 should not mask the major obstacles which continue to hamper transport operations, but rather highlights a new vision of infrastructure associated with new open integration processes, which, as Enrique Iglesias, President of the Inter-American Development Bank (IDB) pointed out at a meeting of ministers in Montevideo in December 2000, makes it possible to envisage economically viable projects forming part of broad regional economic developments, in which private entities will wish to participate, since such projects are part of broad regional economic developments.

The regional approach is another characteristic of the initiatives approved and studies completed in the year 2000 and which suggest that there will be far-reaching repercussions not only in 2001 but throughout the decade now beginning.

South America: a new unit. At the initiative of the President of Brazil, Fernando Henrique Cardoso, the Heads of State of 12 South American countries met in Brasilia on 31 August and 1 September 2000 to launch an action plan for the physical integration of South America in the fields of transport infrastructure, energy and telecommunications. Several financial mechanisms of the IDB, the Andean Development Corporation (ADC) and the Financial Fund for the Development of the River Plate Basin (FONPLATA) will participate in the programme for implementation of this plan, which revolves, in the short term, the undertaking of detailed feasibility studies. Then it will be followed by the immediate execution of projects and international transport services embracing infrastructure along six corridors or major

intracontinental trade routes and their links between the subregion and the rest of the world.

This is the first time in history that agreement has been reached and funding committed for the development of the transport system as an integrated South America, an approach which ECLAC has advocated and fostered since its emergence as a think-tank which seeks to promote the improvement of international transport operations in the region.

This vision is the same one that the Latin American Integration Association (LAIA) conveyed through the publication of *Diagnóstico de la Infraestructura y los servicios de Transporte en América del Sur* - Analysis of the Infrastructure and Transport Services in South America (DITIAS), released in December 2000, in Montevideo, Uruguay. This is a major reference document, the fruit of a detailed study on the status of each mode of transport in the subregion carried out by some of the most prominent South American experts in the field funded by ADC and the Pérez Guerrero Fund. DITIAS now stands out as an essential reference document and the basis for a future transport information system, which can be expected to come on stream in the course of the year 2001.

Central America: a new thrust. The draft Central American Transport Study completed and published in November 2000 by the Permanent Secretariat of the General Treaty on Central American Economic Integration (SIECA) is a proposal for investment in transport infrastructure in Central America over the next 10 years. This initiative, embraces all modes of transport and is additional to the intense activity related to projects already underway or planned for intermodal sea and land transport terminals in Panama, and complements the Central American Transport Information System, devised and promoted by the Central American Commission for Maritime Transport (COCATRAM) which has been recently brought on stream.

Transport in the Americas: another promising initiative. The Western Hemisphere Transport Initiative (WHTI) will hold its fourth Conference of Ministers in the city of Punta del Este, Uruguay, from 15 to 16 March 2001. On this occasion, WHTI is expected to adopt, among other things, a plan of action for the integration of transport systems in the Americas prepared by ECLAC and supported by the Executive Committee of WHTI. Based on the premise of regional convergence, this plan of action, seeks to complement the internal developments of each system in order to achieve coordination of all systems at the level of the Americas as a whole. In its initial phase, the plan identifies three major areas of work: (i) the creation of a hemispheric network of transport information in the Americas; (ii) the study of corridors for transport services catering for trade between regional systems in the Americas and (iii) the design of institutional coordination mechanisms that foster close collaboration among the competent regional transport bodies.

These initiatives in South and Central America and the above-mentioned one embracing all of the Americas reflect the spirit of enterprise and dynamism which seems to have emerged with the birth of the new century in the Americas. They give new hope for the future of trade throughout the Americas and, in particular, for the prospects of the integrated transport systems in which private business initiatives also appear to assume new life after the mood of

pessimism that prevailed in the past year. Logistic services, for example, have successfully applied efficient information technologies to transport operations.

MARITIME TRANSPORT: SHOULD COASTAL SHIPPING BE OPENED UP?

Coastal shipping: In 2000, new coastal shipping services were introduced in Brazil, especially by the company, Alianza, which, a year earlier, had been bought by the German shipping company, Hamburg Süd. Although foreign capital is involved, Alianza has its headquarters in Brazil, and – operating under the Brazilian flag – can provide national coastal shipping services. As in most countries in the region, coastal shipping in Brazil remains the preserve of ships flying the nationed flag. This restriction means that, international services cannot be combined with more than one national coastal service. For example, a service under the Argentine flag between Fortaleza, Santos, Buenos Aires and Bahía Blanca is not authorized to transport cargo between Fortaleza and Santos, while a Brazilian-registered vessel plying the same route cannot transport cargo between Buenos Aires and Bahía Blanca. Brazil also maintains several bilateral agreements which are equivalent to a *de facto* cargo reservation for trade with, for example, Argentina and Chile.

The question of how to promote coastal shipping and whether national markets should be opened up to foreign competition, that is to say to ships flying foreign flags, was widely debated in 2000. At various conferences such as "Intermodal South America" in São Paulo or "Latin Ports" in Miami, and at subregional fora of Mercosur and of the Andean Community, two opposing positions emerged: (i) the need to protect national markets in order to maintain a captive market for shipping companies in each country, and (ii) opening up national markets to provide greater options to users and to ensure a more rational basis for choosing between road and water transport.

For the long term, the trend seems to be towards complete openness. In the interim, one option recently brought up for discussion was subregional or at least bilateral openness, similar to the system in force in the European Union, where any ship registered in any of the member countries has the right to provide national coastal shipping in any other country of the Union. Transport between two countries in the European Union is open to any vessel in the world. In Latin America, for example, it would be perfectly feasible for countries within Mercosur or the Andean Community to have bilateral or subregional agreements for opening up national coastal shipping on a reciprocal basis. When this proposal was put forward for the case of Argentina and Brazil, representatives of both countries expressed opposition: Brazil was of the view that the agreement would not be fair because it (Brazil) would be providing a much vaster market than the Argentine market. In Argentina, on the other hand, it was felt that Argentine shipping companies were much weaker than their Brazilian counterparts and would therefore be at a disadvantage.

The "national merchant marine": In 2000, one decade after the almost complete dismantling of the traditional cargo reservation whereby up to 50% of a country's foreign trade (and up to 100% of government cargo) was reserved for national shipping companies in Latin America, the share of these companies has been declining steadily on international markets. In

Argentina, the traditional national shipping company, ELMA, has been dissolved. Open registries, many belonging to Latin America and the Caribbean countries, are the main beneficiaries of this trend. In 2000, new open registries were introduced by Dominica and Jamaica. Latin America and the Caribbean's share of vessel registration is more than 10 times as high than the share of ship operations controlled by companies with capital invested in the region (31% and 3%, respectively).

Reflecting to this trend, various countries in the region have made statements, at different subregional fora or in political contexts to the effect that having a national merchant marine is vital for any country's foreign trade. It should be borne in mind, however, that today, in practically all countries in the world, internationally traded goods are transported for the most part in foreign-owned and -registered vessels. At the same time, most shipping companies generate their income on foreign markets. It confers no trading advantage for a country on allowing its imports or exports to be transported by a vessel, registered in a particular country.

Shipping conferences: In April 2000, the Organization for Economic Co-operation and Development (OECD) held a workshop in Paris on the extension of anti-trust legislation to shipping lines, i.e. the right to grant and negotiate prices and the allocation of capacities in shipping conferences and discussion agreements. Such exemption does not exist in other sectors and, at the OECD workshop, measures were considered for eliminating this exemption. In 2000, the American Association of Port Authorities (AAPA) officially supported the existing system in statements before the United States Congress. At the AAPA annual convention, in Veracruz, Mexico, concern was expressed for the consequences of the exemption in terms of the competition among shipping lines.

Lines services: In 2000, indirect services, i.e. those involving transshipment, continued to increase. For example, the Maersk company started to link all its services to the West coast of South America with other services in Panama. Hamburg Süd has started to transship through Suape (Brazil), and P&O Nedlloyd has its traffic between the east and west coasts of South America transshipped through Panama. There are practically no regular direct services between the east coast of South America and the West coast of the United States or between the west coast of the South America and Africa. Although direct services can cut back on the duration of the journey and on risks, global networks involving transshipment have increased the effective frequency of services and provided new options for users, thus reducing total transport time.

The Panama Canal: One year after the United States handed over control of the Canal to Panama, the experience can be judged to be positive; the dreaded influence of political interests has not taken place. Consideration is being given to the feasibility of expanding the Canal through the use of locks that can accommodate 1,200 ft. vessels (180 ft breadth and 50 ft. draft). In 2000, 196 million metric tons of cargo passed through the Canal.

PORTS: THE CONTINUING CHALLENGE TO REGULATION

The top three: The three main containerized cargo ports in the region are Colon, in Panama,

Buenos Aires, in Argentina, and Santos, in Brazil. The increasing trend towards transshipment has been maintained thus helping to keep Colon on leading the position (including the terminals operated by Stevedoring Services of America, Hutchison Port Holdings, and Evergreen) with approximately 1,354,000 TEUs (twenty foot equivalent unit containers), followed by Buenos Aires (including Exolgan) with 1,127,000 TEUs and Santos (including Compañía Siderúrgica Paulista [São Paulo Iron and Steel Company]) with approximately 988,000 TEUs. The single terminal handling the most containers was Manzanillo International Terminal (MIT) operated by Stevedoring Services of America in Panama, which, with 1,017,000 TEU in 2000, had the distinction of becoming the first terminal in Latin America and the Caribbean to have moved more than one million TEU in a single year. On the Pacific coast, in Chile, San Antonio once again surpassed Valparaíso to become the foremost port in the country for containerised cargo, while Balboa, in Panama, started operations, with great hopes of becoming one of the main hub ports in the region.

For most countries in Latin America and the Caribbean, structural reform in ports – including private participation and labour systems – remained one of the main challenges in 2000. For those countries which had already privatized investments and operations, one challenge was port regulation to avoid monopolistic abuses and maintain fair competition between government ports as well as with privately-owned ports.

Private operations at State-owned ports: At the beginning of 2000, Chile successfully completed its programme for concessioning its main ports. This brought to six the number of countries in the region that have handed over management of their main State-owned ports to private concession-holders these being: Argentina, Brazil, Chile, Colombia, Mexico and Panama. In Peru, following the successful lease of the Matarani port in 1999, still left under state management, were the main port of Callao and the regional ports of Paíta, Chibote, Salaverry, San Martín and Ilo. Ecuador has continued with the assignment of stowage and warehousing of general cargo and containers to four franchise operators in Guayaquil, and is negotiating concession of the ports of Bolívar, Esmeraldas and Manta; plans are also being made for leasing the container terminal in Guayaquil. All of these countries are thus applying the "landlord" system, whereby the State remains the owner of the infrastructure, but all operations and principal investments are the responsibility of the private sector.

In other countries, such as Guatemala (Port Quetzal), Uruguay and Venezuela, in 2000, the "tool port" system continues to apply; this involves the State's handing over the port as if it were a "tool": it carries out the main investments and administers the greater part of the operations, but stowage and related activities are carried out by private enterprises. On the other hand, there is even less private involvement in countries such as El Salvador, Guatemala (Santo Tomás de Castilla) and Nicaragua where the State operates ports under a "service" arrangement, that is to say, the State, itself, provides the main services.

Regarding progress made up to the year 2000, it should be noted that the decision to privatize is a political one and is closely linked to the socio-economic situation in the country. For example, a country with an open economy has greater need of efficient ports. For a country with a high external debt burden, reducing subsidies and/or securing income through

the concession or sale of infrastructure assets becomes a pressing need. As far as private operators are concerned, the incentive to invest is greater if the port has an extensive hinterland and the country is politically stable. In many countries, where public ports operate as powerful monopolies, an added problem is the difficulty of avoiding the creation of private monopolies. This is the case, above all in the Caribbean island States, and also in various ports on the Pacific coast of South America, where the hinterland is cut off by the Andes. Comparing those countries which have moved ahead further with the privatization of operations and investments with those that have not done so, one should be aware that the remaining ports are more difficult to lease out than those already in the hands of private entrepreneurs.

Telematics: A number of ports, such as Valparaíso and Buenos Aires, have launched vertical portal projects linking them to Customs, port operators, shippers and port and shipping authorities. Generally speaking, however, Latin America and the Caribbean seem to have made less progress in this area than the industrialized countries.

Dredging operations: In the River Plate system, discussions commenced on how to deepen from 36 to 40 feet the navigable channel from San Martín to the ocean. Countries associated with the Paraguay - Paraná waterway, decided to invite tenders for leasing out the system to a toll waterway operator. On the Brazilian side, in early January 2001, the Federal Judiciary of the State of Mato Grosso do Sul decided to suspend environmental licences for the work on the waterway.

RAIL TRANSPORT CONTINGENT ON THE STRENGTH OF THE ECONOMY

City railways. The sustainability of the transport systems in major cities depends, in part, on a more extensive use of railways. In 2000, in some cities, significant progress was made in this direction, with the impetus coming, in all cases, from governments whether national, regional or local. For example, in Buenos Aires, bids were received for the construction of sections of the new H line of the underground, while the Ministry of Transport awarded a series of contracts for renovation of the historic line A in the same system. Chile's MetroTren suburban service, which has been in operation for the past ten years was extended beyond the suburban area as far as San Fernando, some 130 km from Santiago. The construction of three extensions of lines 2 and 5 have been announced for the Chilean capital. In São Paulo, construction of the line 5 of the metro system is continuing and the suburban train system is being modernized. A contract for the construction of a light rail transit system in Maracaibo, Venezuela, represents a significant step forward for their options, little applied to date in Latin America.

On the other hand, some construction projects are at a standstill. The start-up date for work on the much analysed and debated Metro of Bogotá has been pushed for into the future as a result of the coming on stream of the Transmilenio bus system, which will be able to satisfy transit requirements over the next few years (as explained further on in our "overview"). The commencement of commercial operation of the metro systems in Brasilia and Lima did not happen in 2000, despite the fact that long stretches had been almost ready for several years. In Concepción, Chile, the introduction of a suburban electric train service did not meet with a

very encouraging response from members of the public, who preferred to travel by bus or shared taxis, confirming, once again, the fact that rail services are rarely the best choice for cities which do not have at least one million inhabitants.

On the demand side, suburban trains and above all the underground system in Buenos Aires usage declined, probably due to the slowdown in the Argentine economy. Conversely, use of the Regional Metro of Valparaiso and of the MetroTren in Santiago increased, reflecting, in part, the less anemic economic situation in Chile.

Inter-urban passenger trains. Demand for inter-urban rail passenger services in the Province of Buenos Aires also declined in 2000, while the opposite was true in the south of Chile. Chilean State Railways; ordered for reconditioned trains for the medium-distance service between Santiago and Chillán. In the south of Peru, in Cuba, and in a few other countries in the region, there is a renewed interest in providing train services for tourists.

Transport of goods by rail. No major rail freight concessions were awarded in 2000, although Uruguay announced the opening up of the railway system of the Administration of State Railways to private-sector operators, and Costa Rica has proceeded with a plan to lease out sections of its inactive national railway.

Some concessionaires have come up against economic difficulties. The financially over-extended Chilean group, Cruz Blanca, sold its controlling interest in the Bolivian *Empresa Ferroviaria Oriental* to the United States company, Genesee and Wyoming. The Chilean firm, *Ferrocarril del Pacífico* (Pacific Railway Company) tried to renegotiate its agreement with the Chilean State Railways relating to payment for track use. In Argentina, generally speaking, the depressed national economy has led to equally discouraging volumes of rail traffic, particularly in the case of companies transporting products for domestic consumption, rather than for export.

Other rail companies performed better in 2000; for example, Ferrovías Guatemala broke even financially. The Chilean company, Ferronor, which tried to negotiate a contract for the transport of copper concentrate from the Candelaria mine, signed an agreement with the *Belgrano cargas* of Argentina to operate services the full length of the Northern Transandean

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