

Coastlink Bilbao



SHORT SEA SHIPPING & MOTORWAYS OF THE SEAS: DEVELOPMENT AND PERSPECTIVES

Pilar Tejo Mora-Granados
Technical Director
SPC - SPAIN

- Set up in 2002
- Member of the European Shortsea Network (ESN)
- Members: 29
 - Associations of shipowners, shipping agents and stevedore companies, pilots, mooring services, road transport, freight forwarders,...
 - Port Authorities, State Ports, organisations and regional ports directorates
 - Port foundations, ...



Bilbao, 6 october 2011



AIM

Facilitating the development of competitive multimodal transport chains with significant participation of the maritime mode.

Objectives and main activities:

- To make shippers, road hauliers and logistic operators aware of the SSS possibilities.
- To gather and provide information about available services and SSS's potential for with Spain.
- To identify and analyze problems or obstacles that can affect the competitive position of SSS.
- To develop report and analysis to the Administration and the industry.
- To promote strategic alliances among transport chain operators with a multimodal perspective of short sea shipping.



- **72 regular services from 12 Spanishs ports**
- **57 shipping companies** (30 services offered bay more than one shipping company)
- **Average frequency: 1,3 exits/week)**
- **Ports: 53 with direct link + 38 with no direct link**

| Side coast | Services | Shipping companies | Ships | Ports |
|---------------|-----------|--------------------|----------------------------|-----------------------|
| Atlantic | 34 | 33 | 68 Cont + 24 Ro-Ro | 27 D (+20 ind) |
| Mediterranean | 46 | 37 | 132 Cont + 39 Ro-Ro | 36 D (+32 ind) |

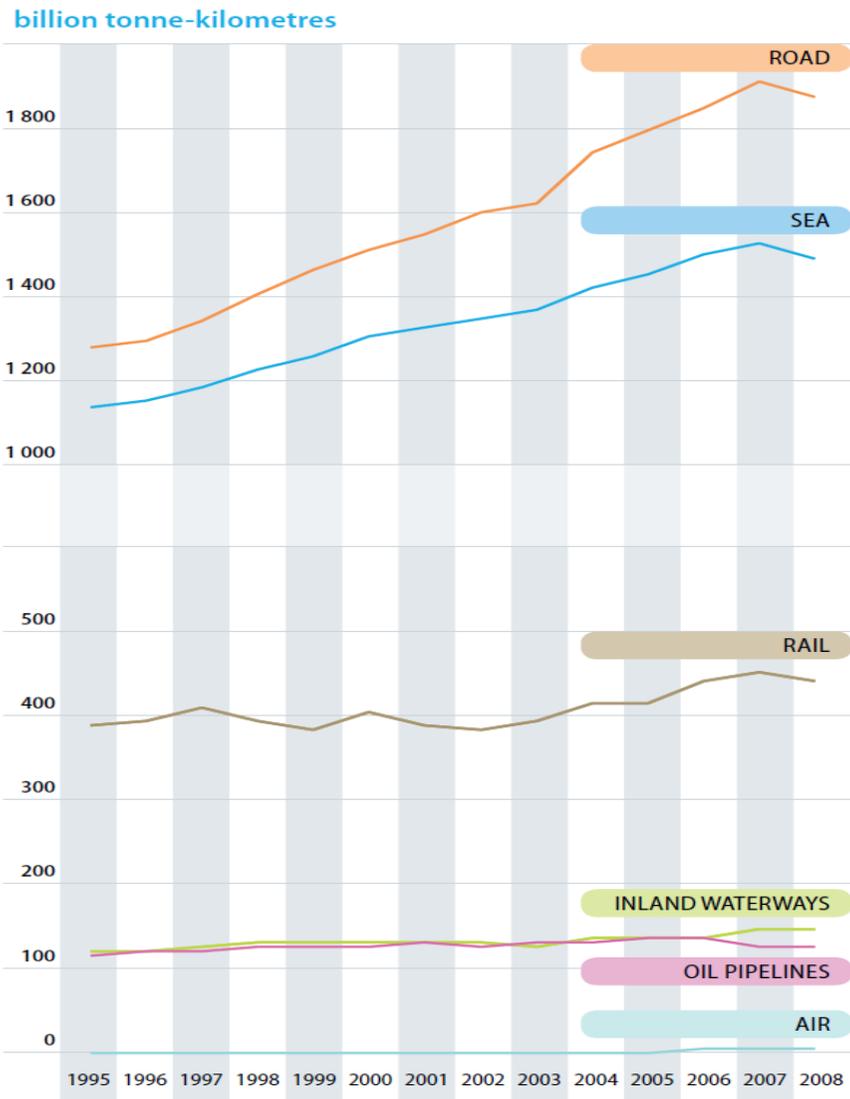


Road es the transport mode that has gained more share in intra-european transport of goods

| | Incr. 1995 - 2008 | 2007-08 |
|--------------|-------------------|---------|
| Road | 45,7% | -1,9% |
| Sea | 30,7% | -2,2% |
| Rail | 14,7% | -2,3% |
| I. Waterways | 19,0% | -1,2% |
| Pipelines | 8,0% | -2,2% |
| Air | 35,0% | -1,8% |
| Total | 33,7% | -2,1% |

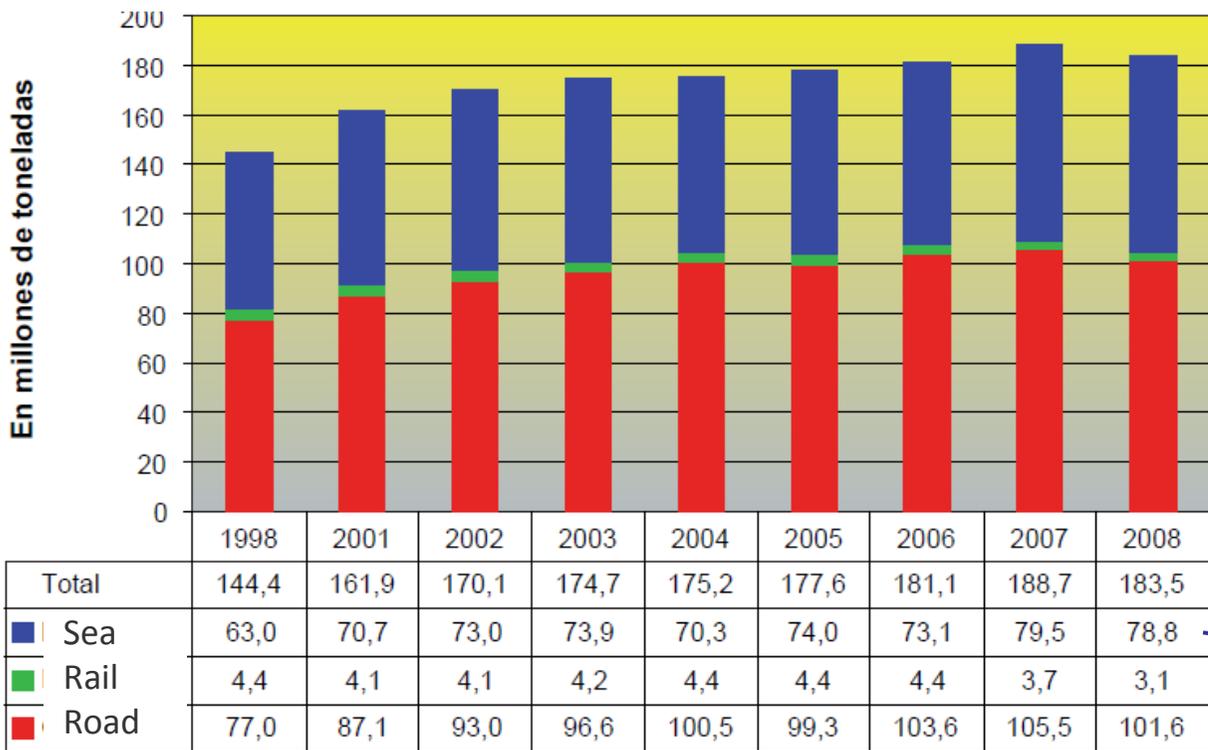
Source: EUROSTAT

EU-27 Performance by Mode for Freight Transport – 1995-2008



- The road increase has been **above** than the maritime

Freight transport between Iberian P. and other EU-15 countries.
Modal split evolution (Mill. t)



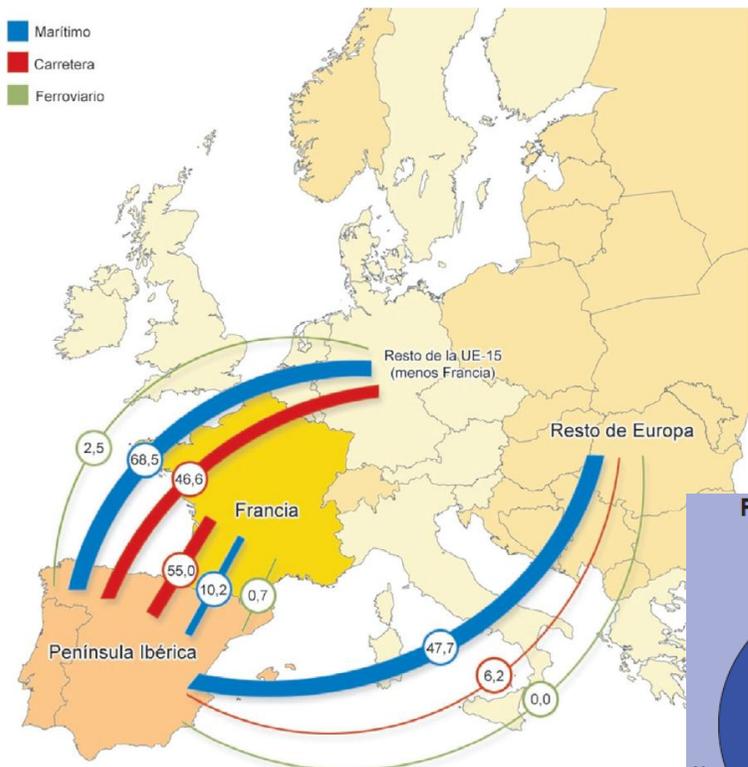
| | Evolución 1998/2008 | | |
|-------|---------------------|----------------|-------------|
| | Total | Annual Average | (2008/2007) |
| Total | 27% | 2,4% | -2,8% |
| Road | 32% | 2,8% | -3,7% |
| Rail | -29% | -3,4% | -15,1% |
| Sea | 25% | 2,3% | -0,9% |

43%
55%



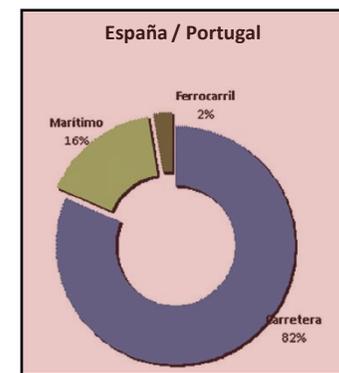
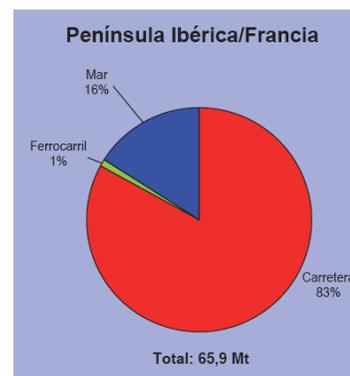
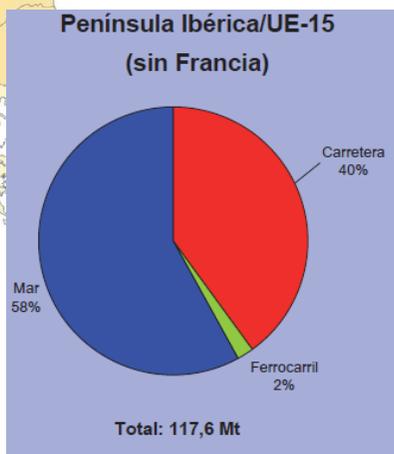
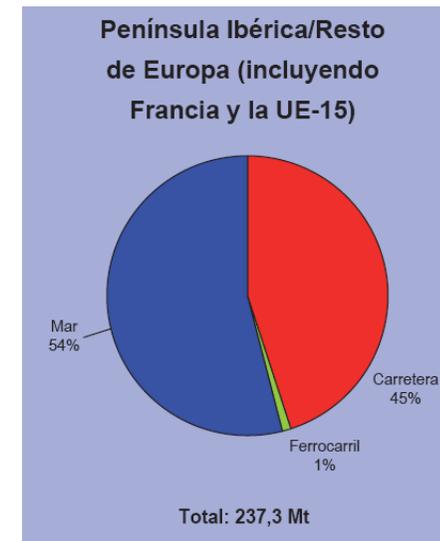
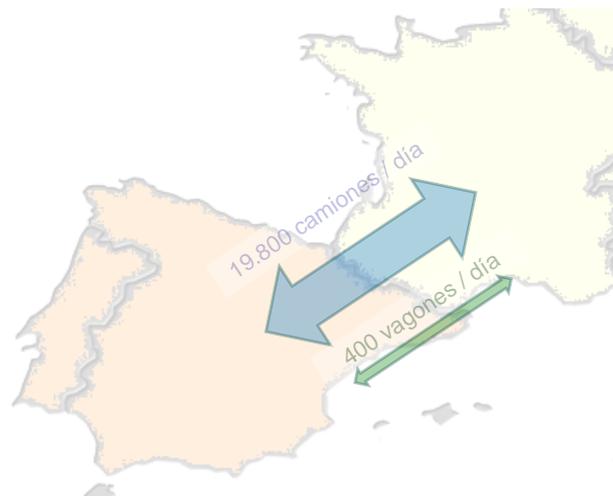
Freight flows between Iberian P. and Europe.

Modal split (million T.)



Freight flows between Iberian P. and Europe.

Modal split (%)

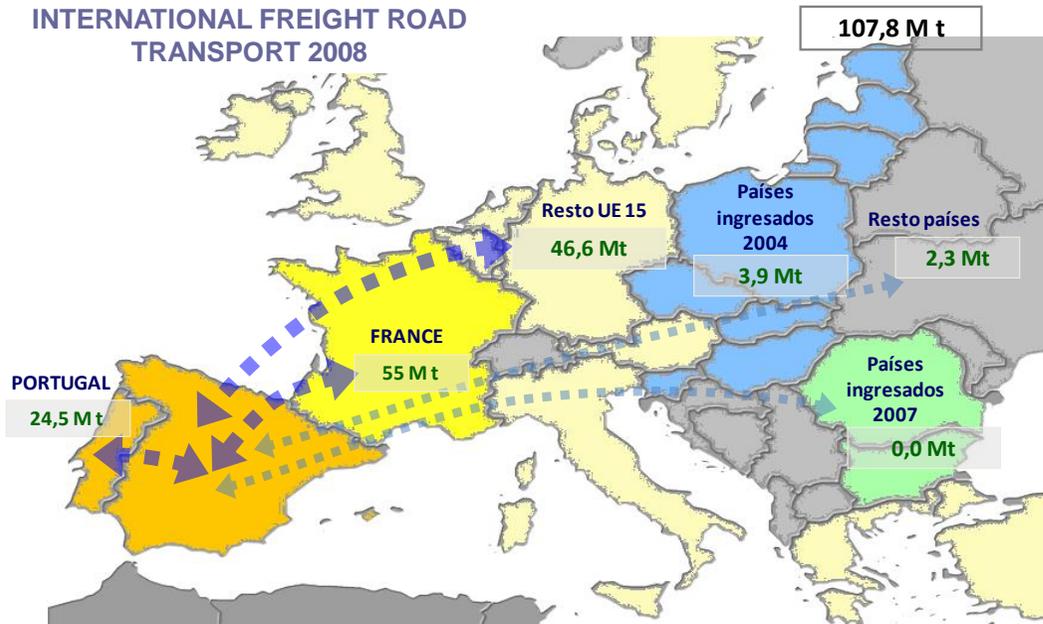


Bilbao, 6 october 2011

Source: Observatorio hispano-francés de tráfico en los Pirineos. Junio 2010
Observatorio transfronterizo España – Portugal. Dic. 2009

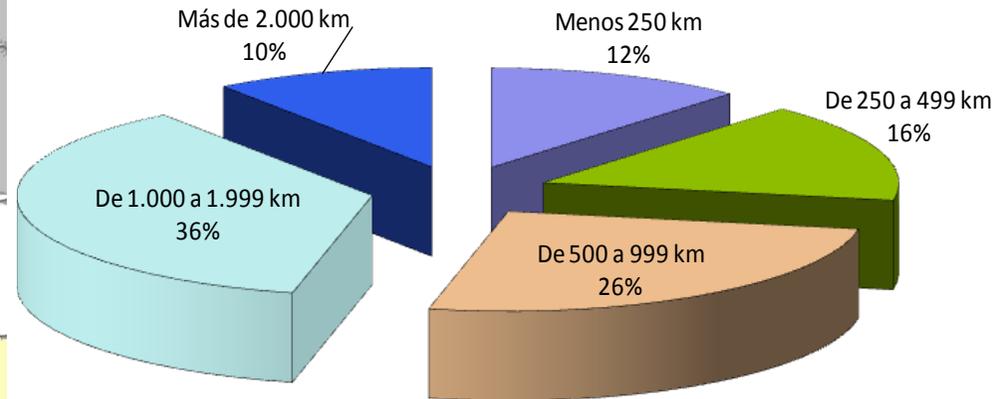
- Almost 50% of international road freight transport takes place at the appropriate distances for Shortsea Shipping

INTERNATIONAL FREIGHT ROAD TRANSPORT 2008



Fuente: Observatorio hispano-francés de tráfico en los Pirineos. Jun Observatorio transfronterizo España – Portugal. Di

INTERNATIONAL ROAD FREIGHT TRANSPORT BY DISTANCES (share in tonnes)



Source: EPTMC 2009

Taxation Increase

- I.E.H.
- Infraestructure taxation.
Eurovignette

Work and employment regulations

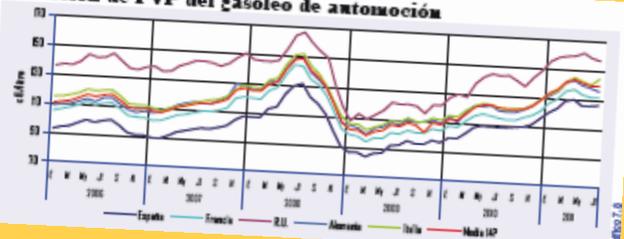
Driving and rest times.
REGULATION (EC) No 561/2006

WHITE PAPER 2011

Reduction of at least 60%
of GHGs by 2050

Fuel prices growth

Evolución de PVP del gasóleo de automoción



Work and employment regulations

Working time - Real Decreto
902/2007, de 6 de julio

WHITE PAPER 2011

Shift of road freight to
other modes

- 2030: 30 %
- 2050: + 50%

Increased **insecurity** of the
vehicle, its cargo and driver

Greater restrictions on
the lorries movement and
traffic

Weekends, local holidays,
....



Benefits of the Short Sea Shipping as compared to a unimodal road:

- Reduces dependence on land transport infrastructure
- Lower transport costs
- Lower fuel costs influence
- Shortest transit time (minimizes impact of driving and rest times regulation)
- Avoids congestion and bottlenecks
- Avoids traffic restrictions
- Increases security reduces risk of theft
- Increases load per unit
- Improves drivers' quality of life



Shipping Company



- Difficulties for concentrating the necessary volume of cargo to give the required frequency
- Difficulties for implementing new services due the high economic risk in the period until reaching the breakeven

Road Freight Company



- Need of higher capacity of organization & planning
- Misgivings about the risk of losing customers (in favour of the shipping company, of larger business size)
- Perception of loss of control of the chain
- Difficulty for resolving the destination drayage
- Risk of damages to transportation equipment (semitrailers). Quick and simple system of claim
- Recruitment difficulties return



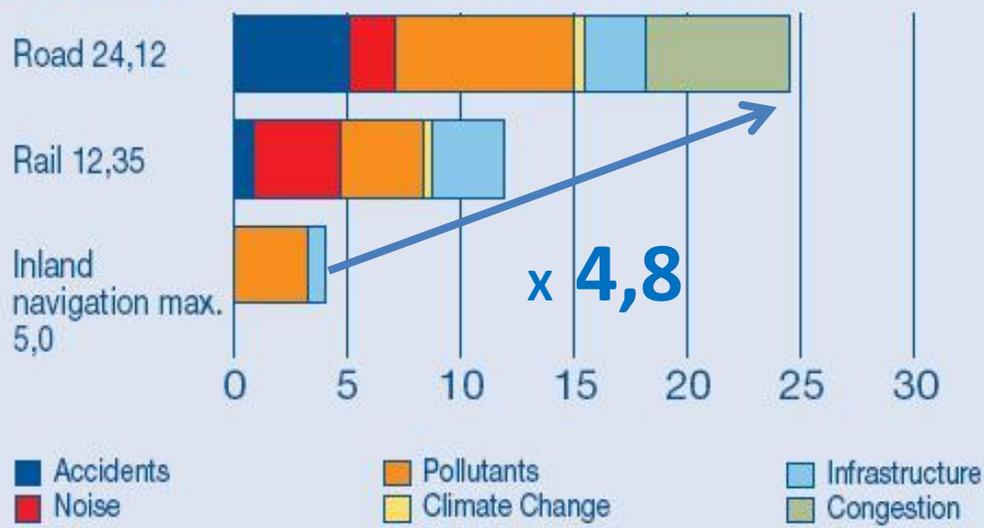
Ports



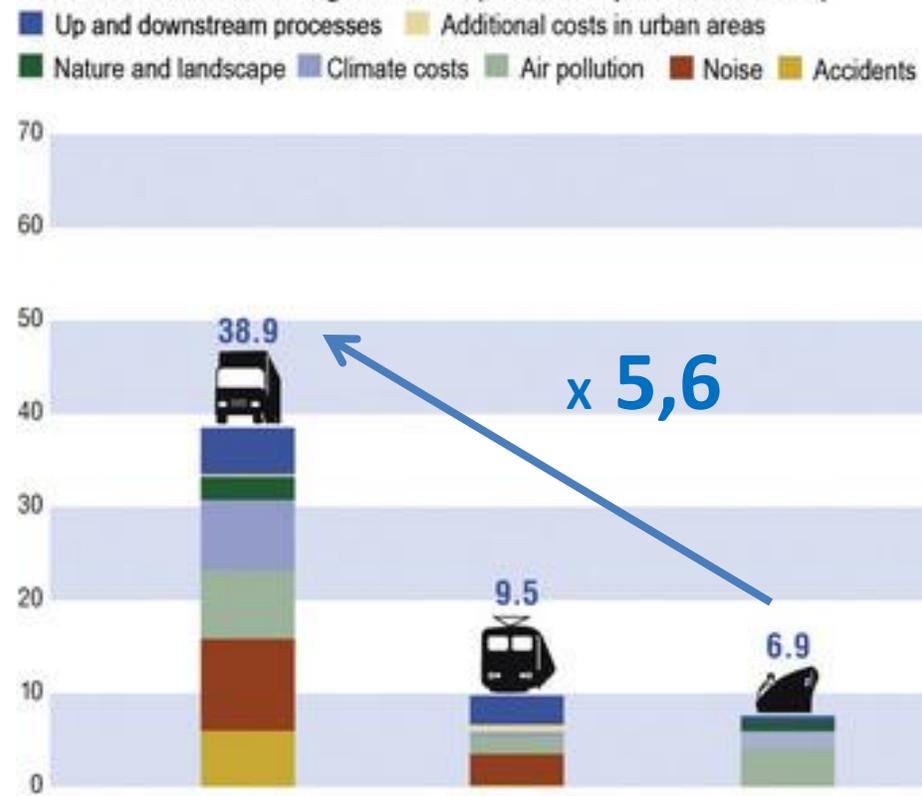
- **Accessibility difficulties :**
 - ✓ By interferences with urban areas
 - ✓ By congestions in certain time slots
 - ✓ By terminals schedules
- **Modal interchange extracosts:**
 - ✓ By paralizaciones
 - ✓ By stowage schedules rigidities
 - ✓ By high stowage costs

- External costs of freight transport by sea are the lowest of all modes of transport

Marginal average external costs of transport by mode in €/1000tkm, European Commission



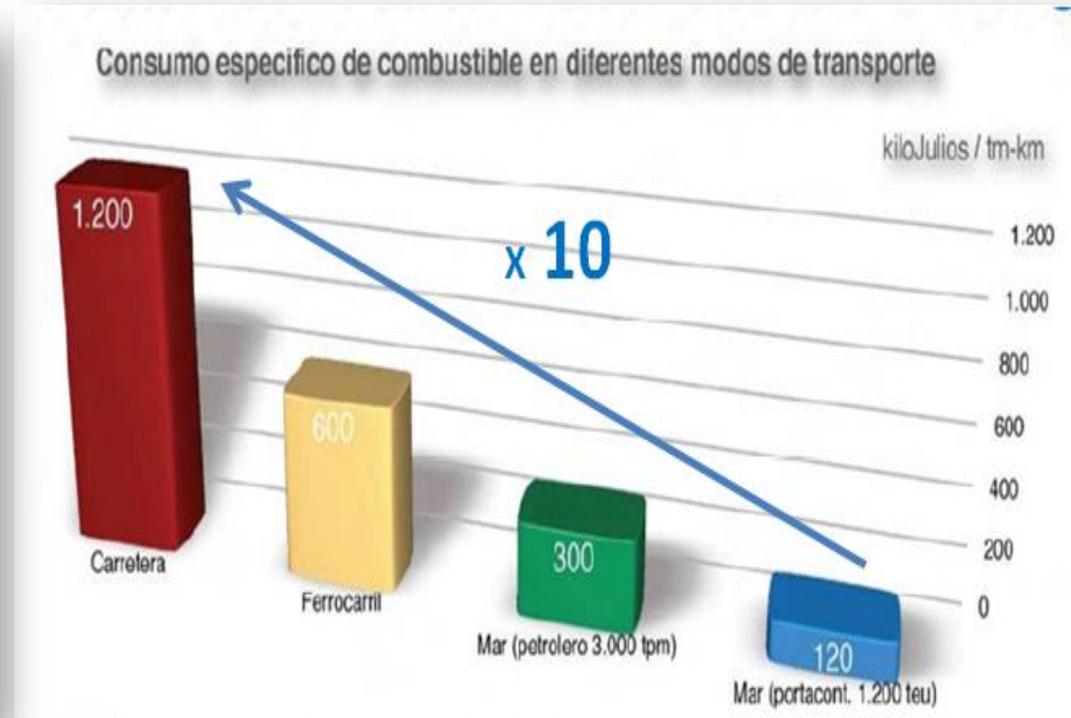
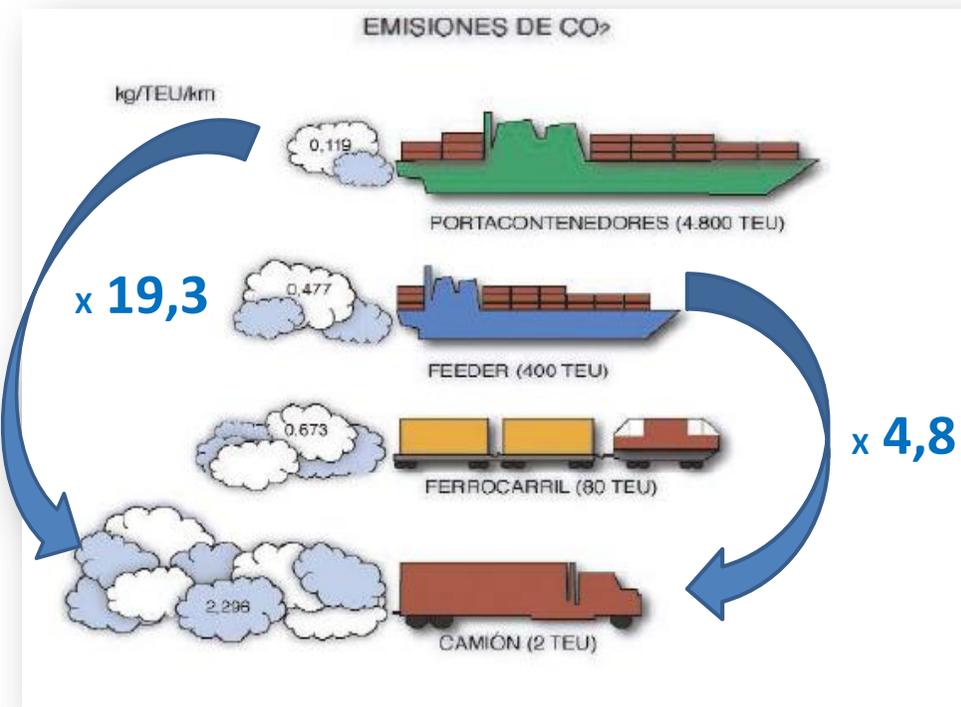
External costs of freight traffic (in euros per 1,000 tkm)

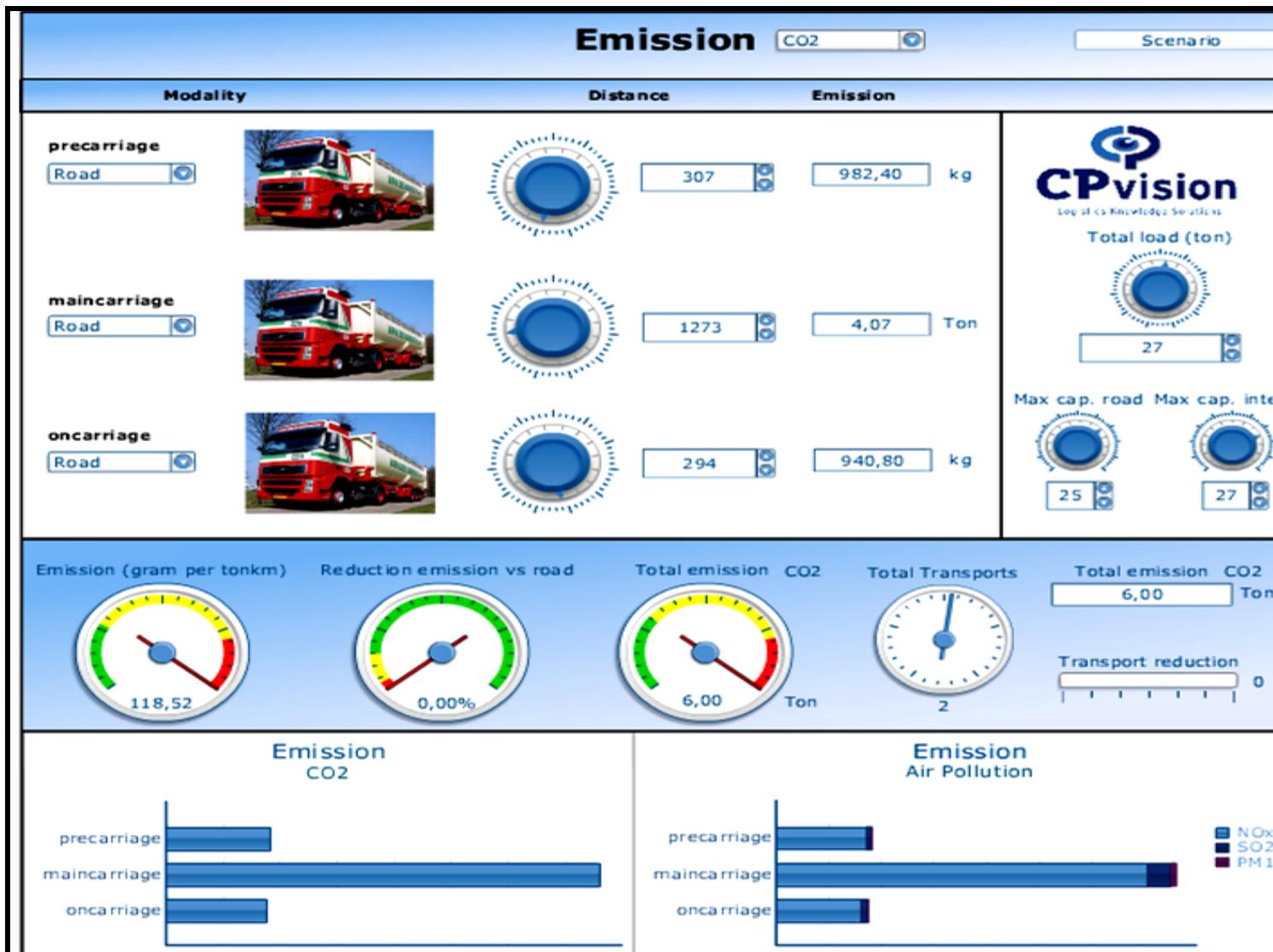


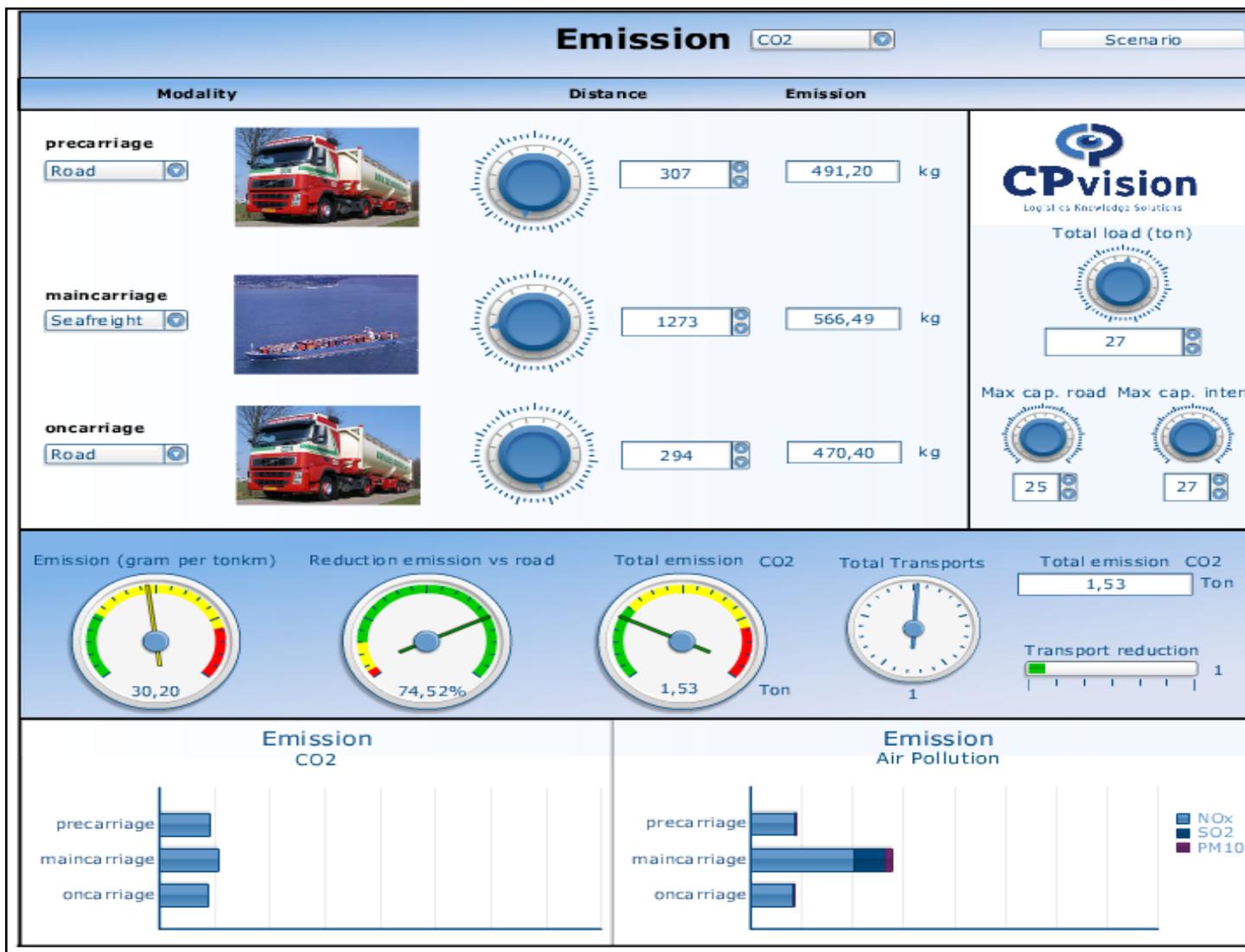
Allianz pro Schiene /INFRAS 2007



Maritime Transport is **the most energy efficient and lower CO2 emissions** mode of transport

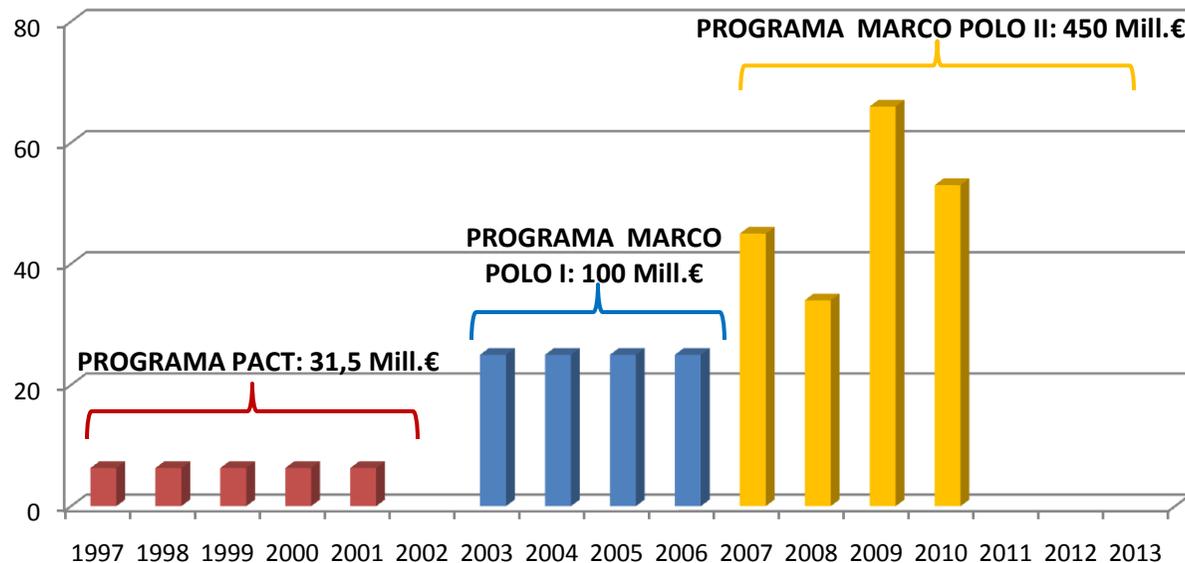






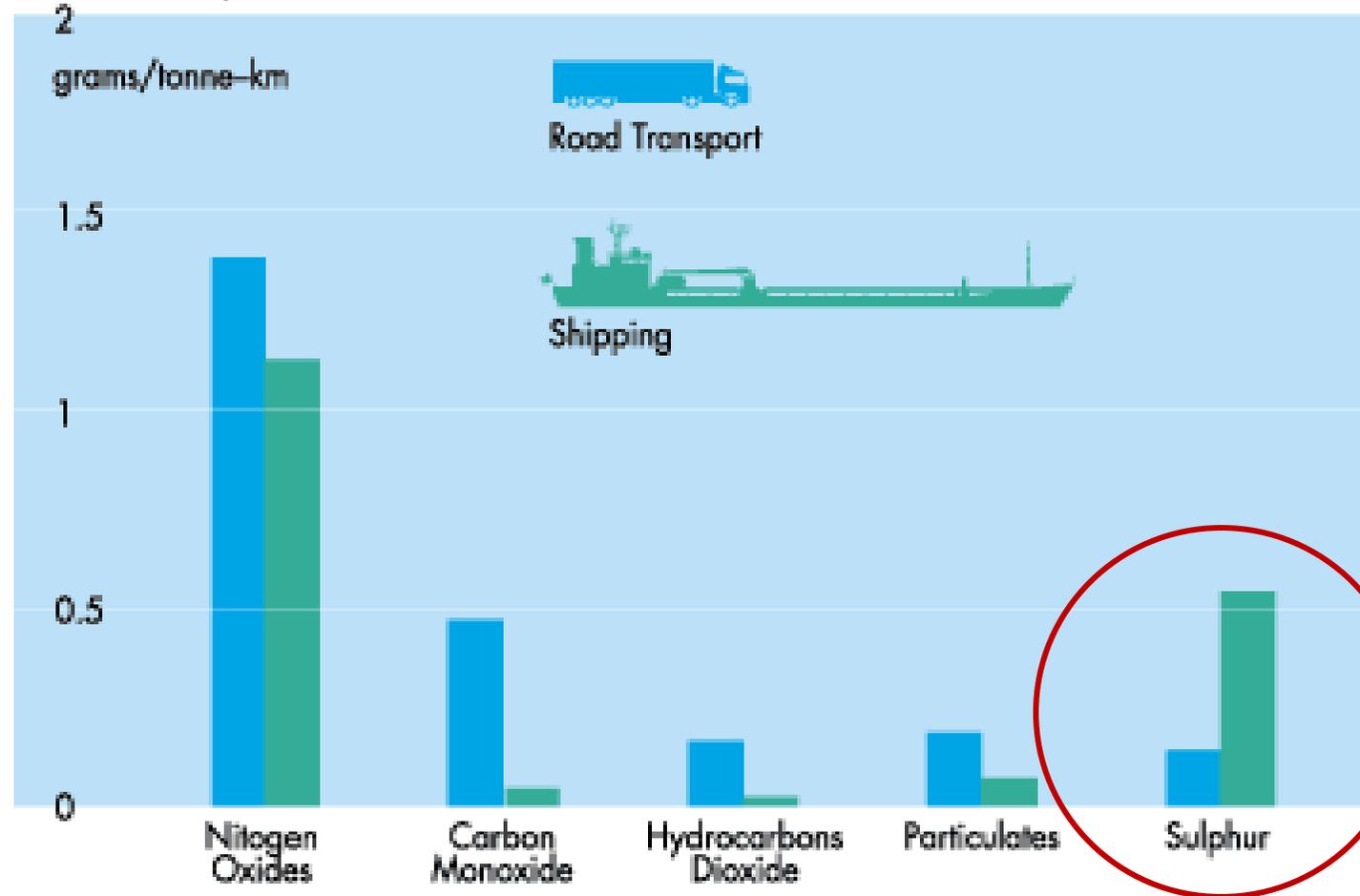
- In the period 2003-2010, **156 projects** involving **624 companies** (50% SMEs) have received funding under Marco Polo.
- Since 1997, about **600 million euros** in direct aids
- Only in the period 2007-2009, an estimated **external costs savings of 1 417 mill. €** for the **modal shift of 58 billion tkm**, which extrapolated to the 1997-2010 period represents **5683 million €** of savings .

FONDOS EUROPEOS APOYO INTERMODALIDAD

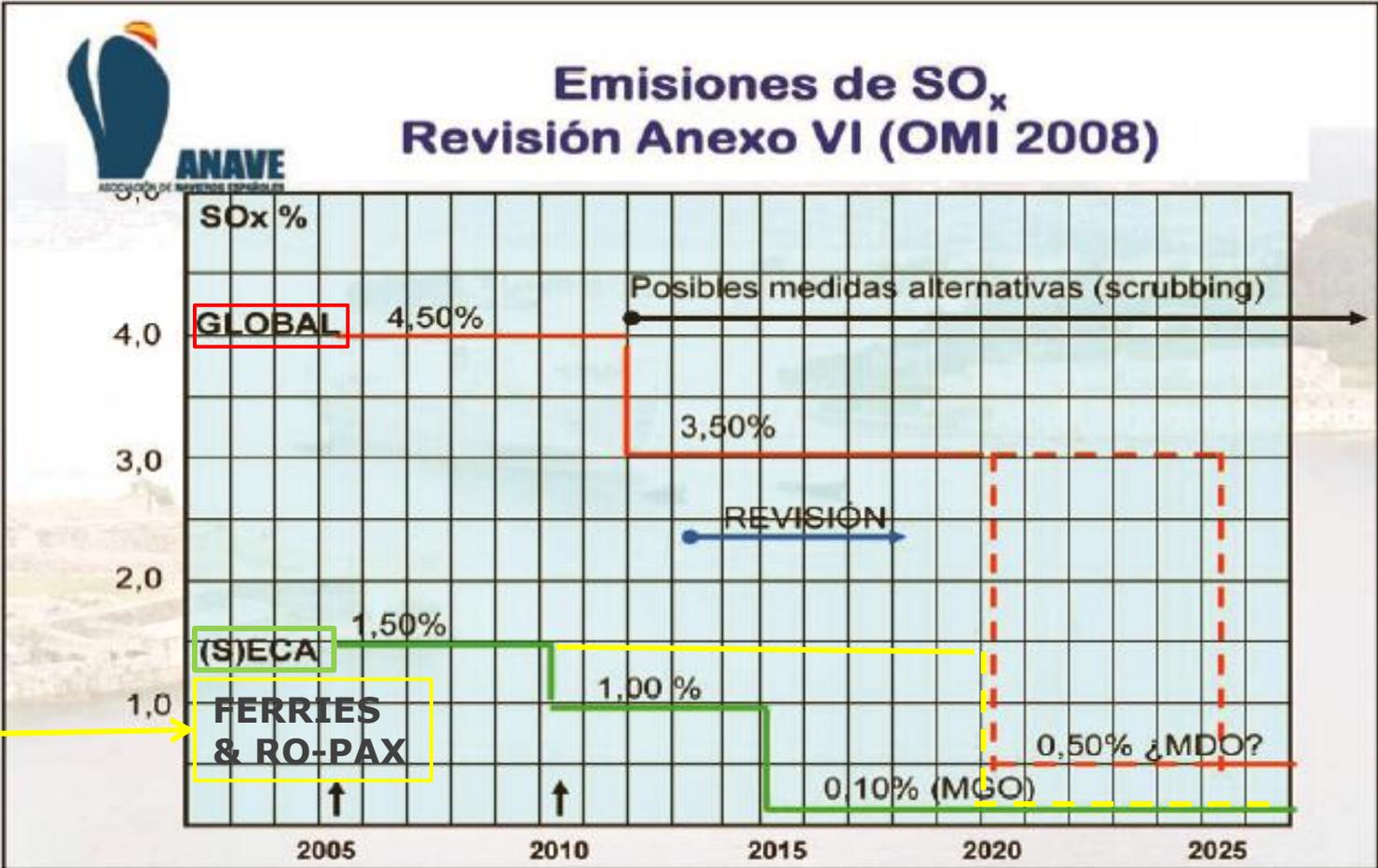


Equivalent exhaust gas emissions - heavy domestic road transport vs shipping

Source: Swedish Transport Research Board 1993

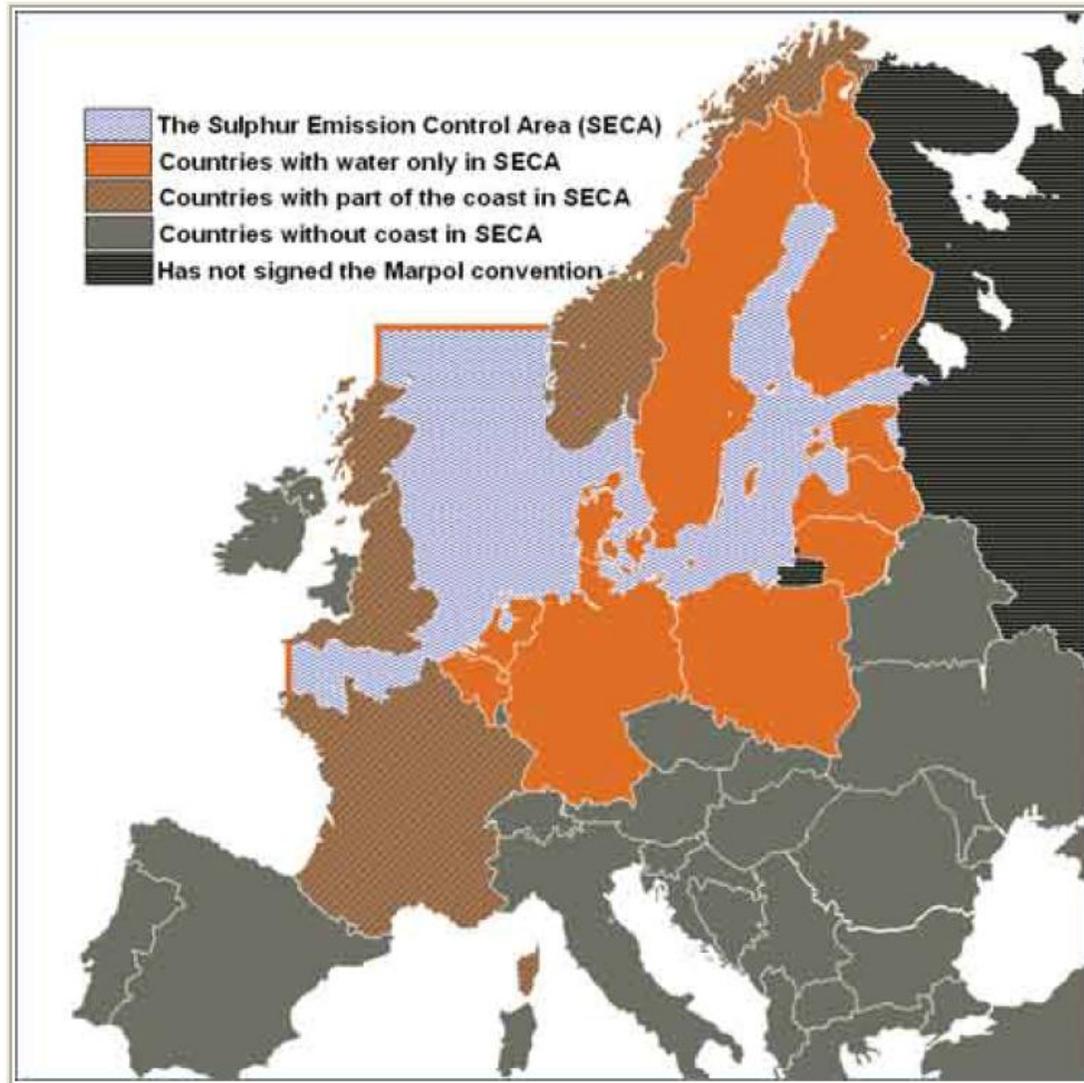


Directive 2005/33 establishes a ceiling of **1.5%** for ferries or ro/pax ships and a maximum of **0.10%** for vessels at berth in EU ports.



Draft Amendments to Directive





<http://>

The screenshot shows the 'SIMULADOR DE CADENAS DE TRANSPORTE' (Transport Chains Simulator) interface. The header includes the logo and navigation menu (Inicio, Buscar, Contacto, Enlaces, Mapa Web, Summary in English). The left sidebar contains links for '¿Quienes Somos?', 'Prensa', 'Newsletter', 'Servicios', 'Líneas existentes', 'Simulador de Cadenas de Transporte', 'Documentacion', and 'Grupos de Trabajo'. The main content area is titled 'SIMULADOR DE CADENAS DE TRANSPORTE' and contains the following sections:

- Origen:** valladolid (checked) - Valladolid, España
- Destino:** hannover (checked) - Hanóver, Alemania
- Parámetros a definir para el transporte sólo por carretera:**
 - Euros/Km: 1,1
 - Vel. Media Km/h: 65
 - Peajes: 0
- Parámetros a definir para el tramo terrestre en las cadenas que usan el TMCD:**
 - Euros/Km Acarreo Origen: 1,1
 - Vel. Km/h Acarreo Origen: 65
 - Euros/Km Acarreo Destino: 1,2
 - Vel. Km/h Acarreo Destino: 65
- Opciones adicionales para el tramo marítimo en las cadenas que usan el TMCD (Los cálculos básicos se realizarán en el supuesto de embarcar sólo Semirremolque y Carga General):**
 - Mercancías Peligrosas:
 - ¿Acompañado?:
 - Carga refrigerada:
 - Animales Vivos:
- Seleccione qué líneas quiere consultar:**
 - TODAS
 - RECOMENDADAS
 - Barcelona → Civitavecchia a través de GRIMALDI & TRASMEDITERRANEA
 - Barcelona → Flushing a través de FLOTA SUARDIAZ
 - Barcelona → Fos a través de DEMLINE
 - Barcelona → Génova a través de GRANDI NAVI & TRASMEDITERRANEA
 - Barcelona → Livorno a través de GRIMALDI & FLOTA SUARDIAZ
- Alta Frecuencia: Fachada Cantábrica:

The bottom of the browser window shows the taskbar with various application icons and the system tray displaying 'Internet | Modo protegido'.



Simulador de Cadenas ...

Documentacion

Grupos de Trabajo



Nombre de usuario

Contraseña

Recordarme

Iniciar sesión

SPC Spain es miembro de la Red Europea de Shortsea Shipping



European Shortsea Network

Opciones adicionales para el tramo marítimo en las cadenas que usan el TMCD

(Los cálculos básicos se realizarán en el supuesto de embarcar sólo Semirremolque y Carga General)

Mercancías Peligrosas ¿Acompañado?

Carga refrigerada Animales Vivos

Seleccione qué líneas quiere consultar

TODAS

RECOMENDADAS

Barcelona → Civitavecchia a través de GRIMALDI & TRASMEDITERRANEA

Barcelona → Flushing a través de FLOTA SUARDIAZ

Barcelona → Fos a través de DEMLINE

Barcelona → Génova a través de GRANDI NAVI & TRASMEDITERRANEA

Barcelona → Livorno a través de GRIMALDI & FLOTA SUARDIAZ

Alta Frecuencia Fachada Cantábrica

Fachada Atlántica Fachada Mediterránea

Resultados ordenados por: Coste Tiempo Distancia



Transporte por carretera

| Origen | Destino | Coste (Eur) | Tiempo (Horas) | Distancia (Km) |
|------------|----------|-------------|----------------|----------------|
| valladolid | hannover | 2.108 | 64,7 | 1.916 |

Transporte Intermodal con líneas marítimas existentes.

| | ORIGEN - DESTINO | Coste (Eur) | Tiempo (Horas) | Distancia (Km) |
|---|---------------------|-------------|----------------|----------------|
| + | Bilbao ** Amberes | 1.930 | 89,9 | 2.163 |
| + | Bilbao ** Zeebrugge | 1.942 | 77,4 | 2.125 |





Transporte por carretera

| Trayecto | Coste (Eur) | Tiempo (Horas) | Distancia (Km) |
|-------------------------|-------------|----------------|----------------|
| valladolid --> hannover | 2.108 | 64,7 | 1.916 |

Transporte marítimo

| Trayecto | Coste (Eur) | Tiempo (Horas) | Distancia (Km) |
|---------------------------------------|--------------|----------------|----------------|
| valladolid --> Bilbao | 308 | 4,3 | 280 |
| Bilbao --> Zeebrugge | 987 | 64,0 | 1.306 |
| Zeebrugge --> hannover | 648 | 9,1 | 540 |
| Total: valladolid *** hannover | 1.942 | 77,4 | 2.125 |

El coste del transporte marítimo es orientativo, para mayor precisión por favor consulte a la naviera.

[Información sobre el Puerto de Origen: Puerto de Bilbao.](#)

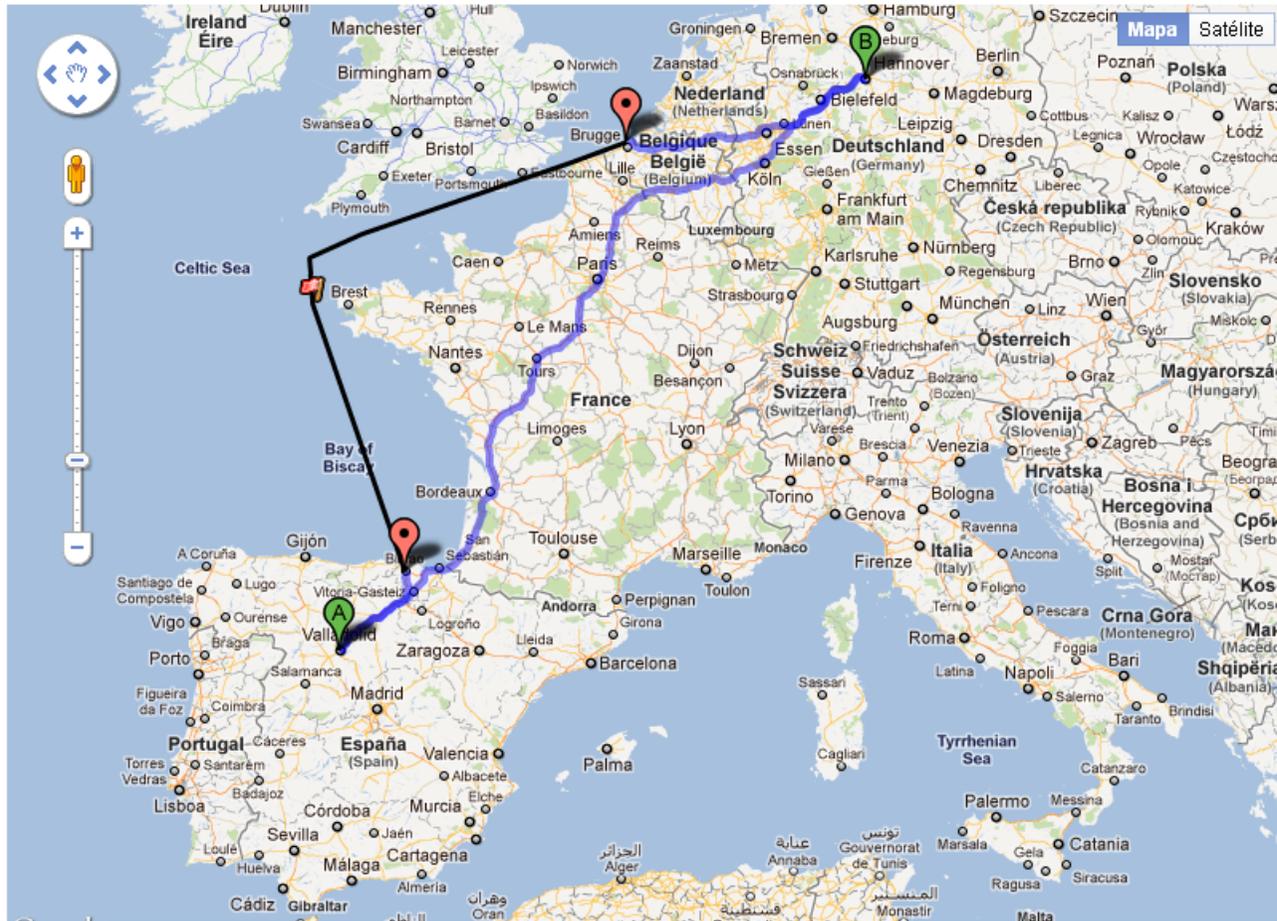
[Información sobre la Naviera y el Servicio Marítimo.](#)

[Información sobre el Puerto de Destino: Puerto de Zeebrugge.](#)

Selecciona la línea marítima:

Bilbao-Zeebrugge a través de TRANSFENNICA

Nueva Simulación



Ver ficha Naviera



TRANSFENNICA
Highway of the sea

Datos de contacto

TRANSFENNICA
Página Web: www.transfennica.com
Agencias en España: Transfennica Iberia

De **Bilbao** ↔ a **Zeebrugge**

Horario

Lunes 17:00 -> Miércoles 09:00
Miércoles 17:00 -> Viernes 09:00
Viernes 17:00 -> Lunes 06:00

Lunes 17:00 <- Miércoles 09:00
Miércoles 17:00 <- Viernes 09:00
Viernes 21:00 <- Lunes 06:00

Información y reservas

- Teléfono: 34 944 831 659
- E-mail: bilbao@transfennica.com

Listo

