

no. 1/2015 (1)

ISSN 2449-6030

Harbours review

EUROPEAN PORT SECTOR FORUM



featured debates

Co-financing harbours' development
Competition in the European port sector

What shipping line
consortia and vessel
sharing mean to ports
and shippers



red-hot port matters

seaport statistics
Top EU ports 2014

this issue's ports

Algeciras, Constantza, Genoa, Oostende,
Riga, Rotterdam, Szczecin-Świnoujście,
Thessaloniki

in harbours
Innovation at box terminals



Port profiles: technical parameters, statistics,
terminals and stevedores, investment possibilities

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A close-up photograph of a chess game. In the foreground, a white knight chess piece stands on a green square of a chessboard. In the background, a black pawn is visible, slightly out of focus. A hand is seen at the top of the frame, hovering over the board. The text "Before your next move:" is overlaid in the upper right area.

Before your
next move:

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red-hot port matters

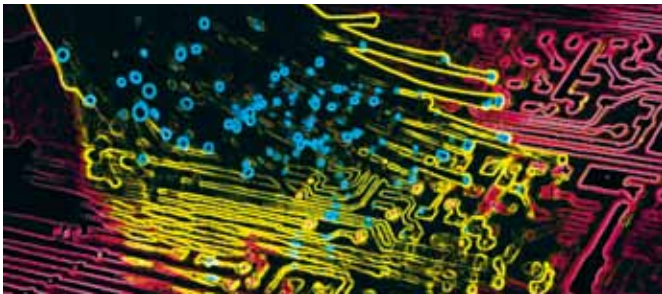
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dear readers,

After ten years of depicting the Baltic Sea region's transport affairs, the Baltic Press team decided to create a new title – considerably widening the scope of our research and reports – devoted to the European port sector. It is our pleasure to greet you on the occasion of issuing the first printed version of *Harbours Review. European port sector forum*. This is a large project, designed with the aim of creating, among others, a platform for dialogue on key sectorial issues, comprising bi-monthly e-zines, newsletters, a webpage, and printed publications – magazine and atlases. In January this year we released the first one, devoted to the ro-ro and ferry business in Europe. We plan to publish another sectorial European atlas late Autumn; this publication will be in line with a conference we're preparing with our partner, Actia Forum, in the Port of Antwerp – Harbours 360 – devoted to ro-ro, break-bulk and container sectors. Take a look inside, in this edition we feature, among others, debates on the meaning of global shipping alliances to ports and shippers, the TEN-T core network development, harbours' co-financing, and competition in the European port business. Hopefully, you will find the statistics regarding the Top EU ports' handlings, as well as those touching upon Black Sea, Baltic and Mediterranean sea-ports, useful in exploring the sectorial landscape. If you have any suggestions, questions, or wish to be involved, we'll be happy to hear from you. We hope you will enjoy your reading,

Lena Lorenc

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red-hot port matters



Photo: Wikimedia Commons



Photo: Arkas Line



Photo: ZIM

Reshufflings at Black Sea box terminals

A total of 2.6 mln TEU (excl. transshipment) was handled in 2014 at the Black Sea container terminals of Ukraine, Russia, Romania, Georgia and Bulgaria. Out of the overall figure, loaded containers amounted to 1.85 mln TEU, marking an increase by 0.6% year-on-year in 2014. Imports accounted for 58.5%, while exports for the remaining 41.5%. With over 0.5 mln TEU, and despite a drop by 12.9% yoy, Ukraine still leads the turnover of full containers in the Black Sea chart, followed by Russia (0.48 mln TEU; +3.3% yoy), Romania (0.42 mln TEU; +9.1% yoy), Georgia (0.26 mln TEU; +13.4% yoy), and Bulgaria (0.15 mln TEU; +8.8% yoy).

However, reshufflings took place among the top regional loaded box sea-port container terminals. The Constantza South Container Terminal of DP World remained in the prime spot (18.68% of market share), but HHLA's 2nd in 2013 HPC Ukraine (Odessa) dropped to a 5th position (10.08%), replaced by Georgian APMT Poti (14.75%), which advanced from a 3rd spot. Russia's Novorossiysk (11.38%) and NUTEP (10.15%) are now in a 3rd and 4th position, respectively.

On the other hand, no changes resulted among container shipping companies serving the market in question. The Top 5 are comprised of MSC (24.08% of market share), Maersk Line (21.19%), CMA CGM (10.44%), ZIM (8.96%), and Arkas Line (6.9%), altogether governing over 70% of the market.

Container handlings¹ at the Black Sea ports of Ukraine, Russia, Romania, Georgia and Bulgaria [TEU]

Country	2014	2013	Yoy	Market share
Ukraine	552,284	634,359	-12.9%	29.78%
Russia	475,679	460,570	+3.3%	26.65%
Romania	415,743	381,135	+9.1%	22.42%
Georgia	255,958	225,756	+13.4%	13.80%
Bulgaria	154,959	142,461	+8.8%	8.35%
Total	1,854,623	1,844,281	+0.6%	

Source: Informall; remark: ¹ Statistics exclude empty containers

Helsingborg and Bilbao to form the Iberian ScanBaltic Corridor

Both ports are seeking EU support for establishing a Motorways of the Sea link between the harbours. The main aim of the project is to shift more freight, particularly fruits, going from Spain to Sweden from roads onto railways and ships. The concept envisages setting up a rail service connecting the south of Spain with the Port of Bilbao located by the Bay of Biscay in the north of the country and then dispatching reefers by vessels all the way to Helsingborg.

If the European Commission gives a green light to the project, the Port of Helsingborg will invest approx. EUR 16.1 mln in years 2015-2017 (of which 30% will be EU co-financed) in quays and cranes in order to be able to serve container ships with larger volumes of seaborne shipments.



Photo: Port of Helsingborg



A completely new energy harbour in Gothenburg

The port authority is planning to build a brand-new 60 ha large energy port in the Risholmen area, to the west of today's freight facilities in Hisingen. Construction works are intended to start in 2018 with 2030 set as the commissioning year. The new energy harbour will comprise five quays. "Expansion of the terminals and the quays is necessary to assure future access to energy products and to provide space for new forms of energy," Arvid Guthed, Vice President Port Development at Gothenburg port, commented on the rationale behind the new harbour project. "The aim is to use the clay which the Swedish Transport Administration is excavating and which needs to be deposited. Instead of transporting the material for landfill we can use it to build a port. By doing so, we can make better use of resources and at the same time avoid long transport distances," Guthed added.



Photo: Terminal Bilbao

Flat year for the Top 10 Baltic box ports

The Baltic Sea region's container majors last year handled a total of 7.83 mln TEU, marking a minimal year-on-year increase of 0.05%. The Baltic Top 10 chart stayed at the same level as in 2013 chiefly thanks to the seaports in Gdynia (+16.4% yoy) and in Klaipėda (+11.8% yoy). These results countered the drops in St. Petersburg (-5.5% yoy), Gothenburg (-2.5% yoy), HaminaKotka (-8.3% yoy) and in Helsinki (-1.2% yoy). In addition, both Gdynia and Klaipėda advanced in the Top 10 chart; Klaipėda overtook Helsinki and Aarhus, whereas Gdynia landed a bronze medal spot by pushing down Gothenburg.

Top 10 Baltic container ports' volumes [TEU]

No.	Port	2014	Yoy
1	St. Petersburg	2,374,876	-5.5%
2	Gdańsk	1,212,054	+2.9%
3	Gdynia	849,123	+16.4%
4	Gothenburg	836,631	-2.5%
5	HaminaKotka	574,982	-8.3%
6	Klaipėda	450,428	+11.8%
7	Aarhus ¹	416,612	+2.7%
8	Helsinki	401,000	-1.2%
9	Riga	387,603	+1.7%
10	Kaliningrad	325,189	+0.8%
Total		7,828,498	+0.05%

¹ Estimated



Photo: Port of HaminaKotka, Jukka Koskinen



Photo: Terminal Bilbao



Rotterdam's Boxreload

The Felixstowe Dock and Railway Company together with the Erasmus University of Rotterdam are undertaking tests on an IT freight tool, Boxreload, on competing hauliers operating in the Rotterdam area. Boxreload is designed to improve truck schedules in ports by reducing the number of lorry journeys, freight operating costs and fuel usage. The environmental benefits of successful implementation include cuts in carbon emissions, whereas additional business gains – a reduction in traffic in the port's congested areas. The project's results will be shared widely in the transport industry. Previous studies on Boxreload have already demonstrated that the solution works from a technical perspective and has business benefits. Rotterdam's project, to be completed by end of December 2015, will cost approx. EUR 1.14 mln and is co-funded with EUR ~570,000 from EU funds within the priority 'Decarbonisation/substitution or environmental cost reduction' under the TEN-T Annual Call 2013.



Photo: Freek van Arkel

Ravenna's Fast Corridor project

Ravenna Port is preparing for a market-oriented study and pilot deployment of an ICT-based system, designed to speed up the commercial, operational and customs controls of trucks and trains entering and exiting the harbour. The "Port of Ravenna Fast Corridor" project's implementation consists of a two-step procedure – research on the system's efficiency to provide guidelines and technical as well as functional requirements, followed by tests on three harbour gates connecting Ravenna to the main rail and road networks. The study will look into the interoperability between the port's electronic platform and the ICT systems of the inland road and rail networks. The chosen ICT solutions are designed to allow the identification of transiting vehicles, containers and RFID seals for a faster control procedure. The new system is to support the development of a Single Desk Customs and the National Logistics Platform programme. Moreover, it aims at integrating the systems for monitoring, evaluation and logistics management, incl. improving risk assessment and decision support, as well as the development of electronic data exchange. The total cost of the project amounts to EUR 1.84 mln and is co-funded with a sum of EUR 900,000 by the European Union as part of the TEN-T Programme.



Photo: Wikimedia Commons



Photo: Ravenna Terminal Passenger



NAPA ports: 1.84 mln TEU handled altogether in 2014 (+9.6% yoy)

Since its foundation in 2010, the North Adriatic Ports Association (NAPA), made up of Koper, Rijeka, Trieste and Venice, has increased its combined container turnover by 43%, from 1.28 mln TEU to 1.84 mln TEU. Taking stock of the results achieved so far, this year's general assembly meeting of NAPA reaffirmed its intention to continue common activities focused mainly on promotional and institutional issues. Additionally, the ports' presidents signed a new Memorandum of Understanding in which all harbours confirmed their mutual interests in supporting the future development projects of each port (railway and inland waterways, use of LNG, implementation of low emission solutions, among others) in line with EU guidelines and the Community market's needs.

NAPA ports' volumes

Port	2014	Yoy
Container traffic [TEU]		
Koper	674,033	+12%
Trieste	506,007	+10.3%
Venice	456,068	+2.1%
Rijeka	192,004	+15%
Total	1,835,960	+9.6%
Freight traffic [mln tn]		
Trieste	57.15	+1%
Venice	21.8	-10.5%
Koper	19.0	+5%
Rijeka	9.0	+3.9%
Total	106.95	-1%

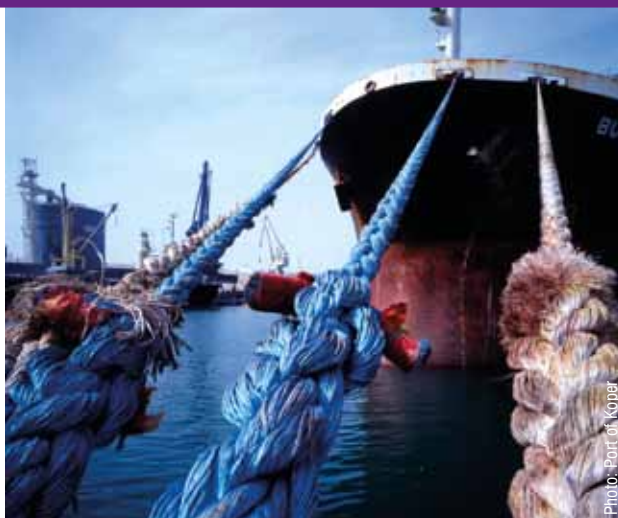


Photo: Port of Koper



Photo: Port of Venice





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Deurganck Dock Locks on their way to Antwerp

The 70 m long, 11 m wide and 27 m high four lock doors (each weighing 2,000 tn) have left their Chinese constructor, the Shanghai Zhenhua Heavy Industries Company (ZPMC), and are to arrive in Antwerp at the end of May/beginning of June. In addition, ZPMC has constructed trolleys on which the gates will ride, two combined road/rail bridges, the caisson as well as other components. Thanks to the Deurganck Dock Locks, the Port of Antwerp will be ready to handle larger ships on the left bank of the Scheldt river, in turn increasing the amount of freight handled there from 16 mln tn in 2011, to 25 mln tn in 2020. Construction works began back in 2011, whereas the new dock is to become operational in 2016.



Photo: Wikimedia Commons

Dublin's new Q1 freight turnover record

Ireland's Port of Dublin handled a total of 7.8 mln tn of cargo during this year's first quarter, advancing by 5.3% year-on-year. The result is the best one in 10 years' time and surpasses the previous Q1 record from 2007 by 3%. Altogether 1,642 ships called at Dublin in the period in question, serving 4.7 mln tn of imports (+6.9% yoy) as well as 3.1 mln tn of exports (+3% yoy). Eamonn O'Reilly, Chief Executive of the Dublin Port Company, commented on the turnover: "This follows growth of 7% in 2014 and 3% in 2013, putting Dublin back on our Masterplan's growth trajectory which will see volumes double over the period from 2010 to 2040. Our current plans are centred on the Alexandra Basin Redevelopment Project which we hope to commence during 2015. In addition to providing additional capacity for cargo, this project will allow us to bring the world's largest cruise ships right up to the East Link Bridge. We are expanding the capacity of Dublin Port to cater to future growth with a focus on working within the existing footprint of the port and maximising the use of existing port lands. Our plans include the lengthening and deepening of the port's berths and shipping channel and the redevelopment of existing lands for more intensive cargo handling."

The Port of Dublin's volumes

	Q1 2015	Yoy
Imports	4,687 thou. tn	+6.9%
Exports	3,140 thou. tn	+3.0%
Total	7,827 thou. tn	+5.3%
Ro-ro traffic	207,042 cargo units	+7.2%
Container traffic	146,156 TEU	+7.3%
Vehicles	32,917	+38.8%
Ferry passengers	277,269	+5.0%



Photos: Wikimedia Commons

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Improvement needed

by Łukasz Pastor

In years 2007-13 the European Union distributed EUR 75 bln out of EUR 347 bln of the EU structural funds available to finance investments in roads, railways, airports and harbours. The 2014-20 period is even more promising – the funds available to the sector amount to EUR 100 bln. Several years ago the European Court of Auditors, inspecting investment spending in the EU in seaports, detected a high risk in ineffective fund distribution. Can the effectiveness of resource distribution be improved in a new financial perspective?



Luc T'Joen

Team leader and trainer on performance auditing in the European Court of Auditors

Co-funding basic infrastructures – where it is really needed – is an excellent way to support regional, in particular, and EU-wide development, in general, if this is based on realistic needs and accompanied by quality management.

Thanks to the new infrastructure, European countries have increased the quality of transportation – the journey time for both passengers and cargo was shortened, transportation costs – reduced. Between 2000 and 2013 seaports benefitted from EUR 6.2 bln, which was allocated to support port investments. However, as team leader and trainer on performance auditing in the European Court of Auditors Luc T'Joen depicted in his featured article in the *Harbours review*. *European port sector forum* e-zine 1/2014 (1), there is much to improve in the process of allocating EU funds to the transport sector – as it turned out from a 2010 audit of some of the co-funded projects. His partners in this debate agreed, sometimes however pointing the finger in the opposite direction.

Clear milestones and measurable targets

The European Court of Auditors is one of the EU's five core institutions with the primary role to externally check if the EU budget has been implemented correctly. In his article Luc T'Joen pointed out, firstly, the lack of proper overall long-term port development planning regarding all

stakeholders, such as national, regional and local public authorities dealing with transport and the environment, port authorities, terminal operators, port workers and citizens. "Secondly, the management was often short of quality," he continued, "the objectives of randomly selected projects were only two thirds the right ones; needs were not always properly assessed; the project selection usually was not transparent; the focus was on spending allocated money before the deadline, instead of building what was really needed (otherwise funds went back to 'Brussels')." He further added that costs and benefits were wrongly estimated, with cost overruns being the rule rather than the exception, whereas monitoring was only output-related rather than assessing results achieved. Moreover, existing bureaucratic hurdles and numerous authorizations needed were additional reasons complicating the process of a project's realization, which upon completion, was neither supervised by the managing authority nor the European Commission as to whether the results were in line with the objectives set forth in the investment proposal. As examples of failed audited

Co-financing EU ports' development

investments Luc T'Joen provided three completely empty ports and several with no link to their hinterland, which – among other such poorly managed initiatives – raise a serious question of the added value brought by such EU-spending. Moreover, such practices cast doubt on the sensibility of co-funding basic infrastructures from EU structural funds in the first place.

Concluding his piece, he called out for improved management of EU co-financed projects featuring a transparent selection, assessing the development needs of all ports and retaining only the projects with the highest added value. Among other needs he named “a clear focus on results with SMART indicators to monitor performance,” and “the so-called ‘one stop-shops’ for building permits with an acceptable maximum time-frame, after which the application for construction is deemed accepted.” Finally, he advocated for better co-ordination of rail, river and road investments at regional, national and transnational levels, to better link ports to their hinterlands.

Trusting the market, respecting taxpayers

As raised by Luc T'Joen, the EU has an important role to play in supporting economic growth and the creation of jobs in the community thereby keeping Europe's competitive position on a global scale and also stimulating growth. For this, it is necessary to spend the assets efficiently, considering development strategies for ports accepted by all involved stakeholders. Bjarne Mathiesen, having vast experience in port business, presently working as Senior Market Director at Rambøll's Port division, understands the concerns that spending European funds raises. At the same time, responding to Luc T'Joen's thesis, he highlighted that investments and possible co-funding by the EU should be based on stringent market logics, as diverse circumstances prevail in the global market, influencing the results of the infrastructural initiatives. As he reminded Harbours review readers, we are long gone past the times when the manufacturing industry was immature, industrial growth was high and transport

between continents was slow and costly. Warning from unrealistic transport forecasts as well as executing heavy investments on the basis of naive dreams of ‘goods coming my way’ if the necessary infrastructure is made available, he noted that success belongs to the most cost-effective transport chain between markets. Finally, Bjarne Mathiesen underlined that defining the Trans-European Core Network was a good starting point for prioritizing future infrastructure investments, nevertheless, advocating strongly for paying greater attention to the market's needs and responses.

Sharing his opinion, Eamonn O'Reilly, CEO of Dublin Port Company, agreed that public funding does not relieve the promoters of port projects from their obligation to maximize financial and/or economic returns, but creates an even higher level of obligation to spend wisely and generate added value. He recapped the big financial crisis of 2008, stating that the current condition of Europe's banking sector



Bjarne Mathiesen

Senior Market Director, Ports, Rambøll

In a very mature Europe there is a strong need for global competitiveness based on stringent market logics justifying investments and possible co-funding by the EU.



Eamonn O'Reilly

CEO of Dublin Port Company

The explanation for the current state of Europe's banking sector and economy, it is the lack of respect for capital in the years up to 2007 which led to many hopeless investment decisions.



Alecos Michaelides

Chairman of the Cyprus Ports Authority

European structural funds are absolutely essential towards developing the competitiveness of EU harbours.



and economy resulted from a lack of respect for capital in the years up to 2007 which led to many desperate investment decisions. Highlighting the necessity for investments accountability, Eamonn O'Reilly added that "in Ireland taxpayers are today bearing (and will for generations to come continue to bear) the burden of bailing out a multitude of poor financial investments in the Irish economy, much of it by foreign banks." According to the CEO of Dublin Port Company, the delivery of port infrastructure necessary to support the EU's economic recovery can only be guaranteed by the discipline imposed on investment decision making, proper external monitoring and evaluation of projects, both ex ante and ex post. These should go in line with the EU's concentration and focus on 83 core ports in the TEN-T network. "If we respect the investment capital available to us (whether from the EU, banks or private investors) and if we address the issues which have led to

poor investment in the past, we will invest wisely in our ports," he pointed out, concluding that such attitude shall enable politicians to decide in the future to allocate scarce EU funds to the port sector.

Different ports – individual needs

In his statement, Alecos Michaelides, Chairman of the Cyprus Ports Authority called the European funds the base for developing infrastructure of ports in EU countries. Seeing the need for more individual assessment of each case, he pointed out that the process of applying for the funds involves the same rules for each port, even though their locations, as well as, political, social, economic, environmental and other dimensions differ. He noted such factors as "the increasing size of vessels, new environmental requirements (e.g. provision of wastewater reception facilities), the set-up of LNG refuelling stations and shore-side power supply, coupled with significant competition from the side of non-EU harbours and markets," as critical to European seaports'

current situation, very dynamic in the face of changes that the port sector is currently undergoing. Alecos Michaelides also recalled the 2008 global economic and financial crisis, and its repercussions, still impacting the EU Member States' economies, stressing that, in light of the above, the endurance of European structural funds is "absolutely essential towards developing the competitiveness of EU harbours." Cyprus Ports Authority's Chairman further evaluated co-funding necessary to support five key goals, namely: port connectivity, efficiency, attraction of investment, promotion of social dialogue and encouragement of innovation. Listed features were identified in 2013 by the European Commission, serving as tools in creating the political agenda of the Union towards developing a strategy for enhancing European seaports' competitiveness.

Representing Cyprus, located on the eastern edge of the European Union, with no land connections as well as long sea distances to other Member States, Alecos Michaelides emphasized the country's case somewhat greater. "Cyprus lies in close proximity to Middle Eastern countries such as Turkey, Syria, Lebanon, Israel and Egypt, an area which is known for its frequent political turbulences and unrests," he pointed out. "Having such a background, for Cyprus to be able to contribute as a Member State to the overall targets of the Commission and vice versa for the Commission to contribute with proportionate funds based on the needs of each Union state, is of utmost importance that structural funds aimed at enhancing the competitiveness of EU ports are allocated by taking into account all the individual case-wise parameters." Concluding that apart from focusing on infrastructure, harbour co-financing should also concern other aspects, such as regular sea links, he raised the issue of a much needed connection between Cyprus and Greece.

Regarding proposals on increasing the scope of EU support, Marina Rimpo, Director of Market Development for the Baltic Sea region at Port of Hamburg Marketing,



Marina Rimpo

*Director Market Development, BSR,
Port of Hamburg Marketing*

Establishing a supportive institution from the EU, which is transferring helpful knowledge during the planning process would support standard procedures within Europe.



Curt Kristoffersson

*Former CEO,
Port of Umeå*

The whole application process, the overall control and being in the swim while executing a project consumes valuable time and resources from the pool of port capacities.



stated that extended financial support from Brussels towards more sustainable support of project managing skills and know-how would be welcomed. She called to establish a supportive EU institution, in order to enable transferring knowledge helpful during the planning process, thus supporting standard procedures within Europe. "This should also cover unbiased project monitoring," she added. "The knowledge gathered throughout the whole process will meet EU quality standards on how to develop and lead a project and can additionally be transferred to new projects," she specified, identifying the "knowledge transfer" as a more sustainable character than only the provision of financial support and an asset towards the wise usage of EU funds.

Bureaucracy hurdles

Former Port of Umeå's CEO Curt Kristoffersson, agreeing that EU co-financing is essential to execute seaport infrastructure, noted both that funds should be given to proper projects which maximize benefits and that the burden of bureaucracy should be minimized. "Already today the whole application process, the overall control and being in the swim while executing a project consumes valuable time and resources from the pool of port capacities, occupied by everyday tasks at the same time," he said, recognizing small ports with limited human resources as those most hit. Moreover, in reality of rapid changes shaping the shipping world, he acknowledged a port's situation, tabling an application

for EU funds on the basis of a certain reality, as particularly defenceless in the face of bureaucracy procedures in case conditions change during the long implementation process of a given project. In his final statement, Curt Kristoffersson called establishing a core & comprehensive TEN-T network of seaports "a good starting point" for governing the issue.

A strong voice regarding the European Court of Auditors and the legislative procedures was given by Villu Vatsfeld, Chairman of the Board at Saarte Liinid – Estonian Port Association, explaining that while understanding Luc T'Joens' concerns, both applying for funds and cooperation with

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Photo: Jarek WierPort

auditors were from his point of view difficult. Representing one of the biggest beneficiaries of structural funds used for port development projects in Estonia during the last financing period, he branded the specific route of legislative procedures that the beneficiaries

are expected to follow as critically inflexible. Principally agreeing with the Port of Umeå's former CEO, he added that "to follow this route may take years, during which the world's economy and politics are changing independently and sometimes ruthlessly," and result "in years of disputes with the auditors whether a proper practice was used."

He noted that during a project's execution different circumstances than planned may occur – "it may start with the geology assessment done wrongly, the market situation changing rapidly or the climate causing additional problems. Within the duration of such assignments many issues have to be taken into account and dealt with, and it has to be done in a flexible manner, including altering the actual project itself, if necessary." According to Villu Vatsfeld, this is where officials, obliged to follow a bureaucratic drill, are expecting the beneficiary to stick to the procedures exactly according to the original project, even if it's no longer feasible. Saarte Liinid's Chairman of the Board called such a situation "a waste of time, money and human resources" and made a small push to the auditor side directly, advocating they should be certified regarding their competence in infrastructure development and construction. "The simple question is how far the auditors should go in teaching

beneficiaries how to deal with the funds, because at times it is the beneficiaries who are more competent in running and developing infrastructure. And it is a competence gathered throughout tens of years, it cannot be compared with theoretical or legal knowledge," he concludes.

Efficiency, transparency and good management needed

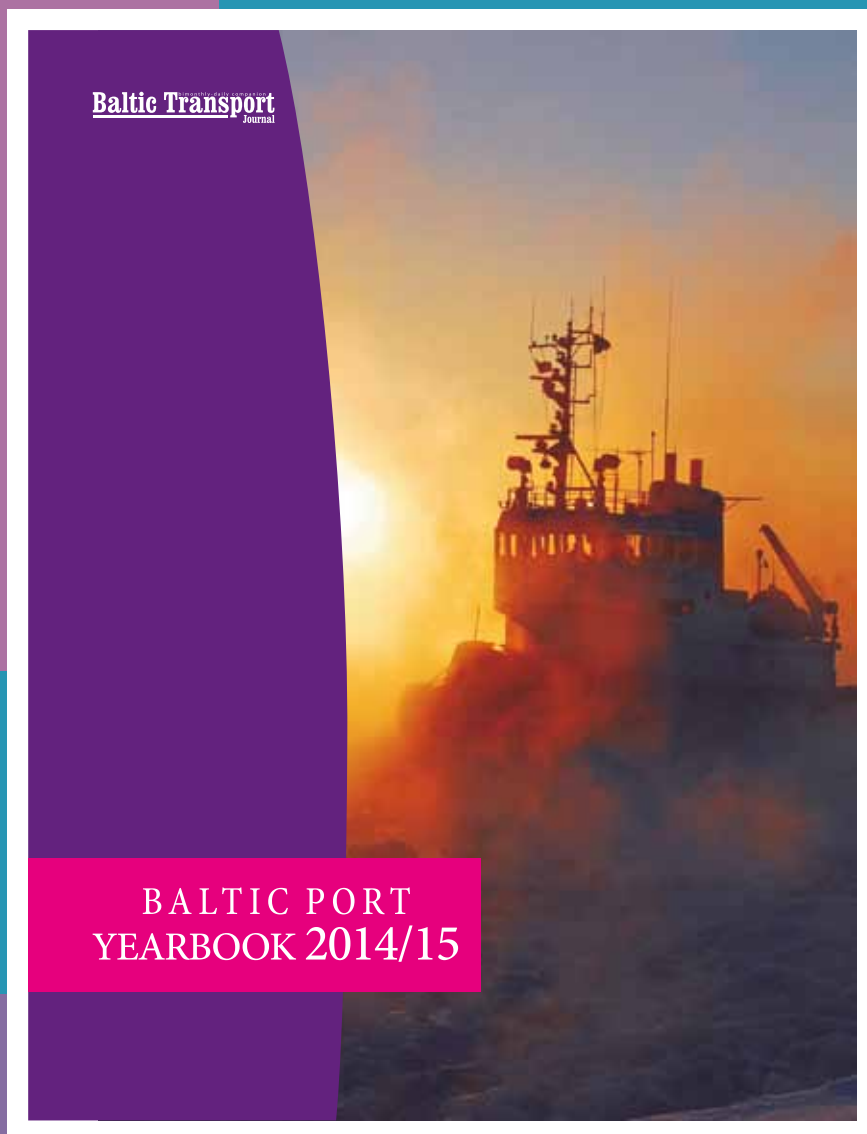
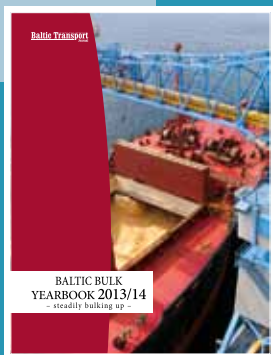
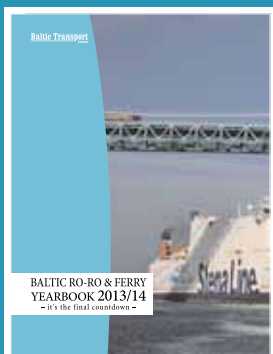
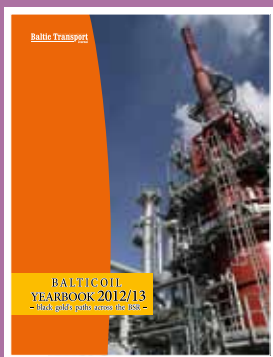
There's no doubt that some rules or procedures don't seem clear, fair or reasonable enough for businesses that apply for European funds and, that on the other side, the auditors as well as the EU officials have to stick by the book in order to serve the EU citizens and taxpayers as well as possible. The whole process of applying for funds seems uncomfortable and unnecessarily complicated. Co-financing investments in harbours, however, has been deemed necessary by all parties of this debate. Even though the process of distributing funds across EU ports is not perfect, it fortunately does exist, as worthy projects need cooperation of many stakeholders. There are billions of euro to share and spend in the 2014-20 financial period and all interested parties, including EU citizens for the ultimate benefit of whom these projects are being implemented, hope that the money will be spent efficiently. Good cooperation is the only way to make it real. ■



Villu Vatsfeld

Chairman of the Board, Saarte Liinid

"The simple question is how far the auditors should go in teaching beneficiaries how to deal with the funds, because at times it is the beneficiaries who are more competent in running and developing infrastructure."



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How big a concern, how ample an opportunity?

by Magdalena Dams

The issue of global shipping agreements raises many controversies in the shipping industry. They are created with the purpose of entailed benefits, however, with the lack of appropriate analyses they can significantly imbalance the market. Industry experts take on the task of defining the consequences of such enterprises.



Chris Welsh

Secretary-General of the Global Shippers' Forum

The Commission has failed to carry out a competition rules assessment of the P3 which would have provided future legal clarity for similar alliances, such as the 2M and the Ocean Three.

Global alliances and VSAs have many benefits and can have a positive impact on the future growth of shipping through reduced costs and a wider range of services. On the other hand, these agreements should be based on clear rules, which would prevent possible market domination. In his article published in *Harbours Review. European port sector forum* 2/2014, Chris Welsh, Secretary-General of the Global Shippers' Forum, started a discussion on the topic by elaborating the history and characteristics of shipping line consortia and vessel sharing agreements (VSA), as well as presented his view on the blocked P3 alliance.

Behind the scenes of lining up

In 1992 the European Commission adopted its first regulations concerning liner consortia in Europe, in which price cooperation was explicitly excluded and exemptions for consortia and VSA agreements with a market share of up to 35% (now 30%) were introduced. It depicted that consortia and VSAs influenced prices on account of their market power, thus

affecting competition as the purpose of the new rules was to deal with price fixing in the shipping industry.

The EC's actions significantly changed the scale of cooperation associated with consortia and VSAs. A new kind of global deals such as Grand Alliance or the New World Alliance, or last year's blocked P3 Alliance emerged, which are larger, more integrated and probably game-changing for the liner shipping industry and its customers. The solutions presented by the P3, G6 and CKYH agreements were very similar to the ones in aviation alliances. Citing supporters of such deals, Chris Welsh mentioned the benefits of codes and vessel sharing, reduced costs arising from joint operations, common investments and purchasing, cheaper fares and rates as well as a wider range of services for customers. Additionally, the problem of market dominance is dissolved as there is no evidence of excessive profits or exorbitant prices. Another factor in favour of such agreements is the willingness to cooperate rather than to compete for increasing market shares by

What shipping line consortia and vessel sharing mean to ports and shippers

e.g. a merger or acquisition. Apart from the global alliances themselves and their sanctioners, consortia and VSAs are also supported by their customers who want to take advantage of such benefits. As reminded by the GSF's Secretary-General, the European Commission didn't discern any grounds to intervene against the P3 under the EU's competition law, but left itself the possibility to take action in the future. Yet, it seems that the EC didn't have any intentions to analyse P3's compatibility with the EU's competition rules or to respond to questions submitted by the Global Shippers' Forum concerning some of the legal issues raised by the P3, especially those relating to market dominance and maintenance of effective competition. As Chris Welsh pointed out, the Commission didn't carry out a competition rules assessment of the P3 to provide future legal clarity for similar alliances, such as e.g. 2M or Ocean Three, as it required potential law competition infringers' customers (including GSF) to



address a formal complaint before the Commission embarked on competition analysis and made a decision. However, the counterparts of EU competition authorities seemed more sceptical about global alliances – the US Department of Justice noted that the benefits of interalliance competition in aviation has not yet been established. Seaspan's Chief Executive Officer Garry Wang commented on his hope that the P3 would support rate stability, "alliances will work more closely not only on vessel sharing but also on freight rate determination." Chris Welsh said that GSF has been open-minded

about alliances such as P3, 2M and Ocean Three and generally supportive of the benefits of traditional consortia and VSAs, which reduce costs and expand the range of services for shippers. Regarding the reasons set out by Garry Wang, the GSF will remain inquisitive and press for more profound competition analysis of global alliances, such as the unsuccessful P3.

Following the trends

Giuliano Gallanti, President of Livorno Port Authority, agreed with Chris Welsh's



Giuliano Gallanti

President of Livorno Port Authority

It's clear that the legal tools offered by the jurisdictions of the European Commission, Federal Maritime Commission and China's Ministry of Commerce are too limited in their geographical scope to challenge new phenomena of globalization.



Pilar Parra Serrano

Director of Melilla Port Authority

Stronger competition between ports and terminal operators will induce greater efforts in safeguarding the highest quality of offered services. A natural selection of ports exists, and those that do not adapt their infrastructures, operating conditions or costs, will be left out.



Hrvoje Kulušić

Head of Technical Development and Maintenance, Port of Dubrovnik

Alliances are something positive, provided such agreements are regulated and controlled to make them steer clear of turning into monopolies which could distort the market by fraudulent actions.



Photo: Hapag-Lloyd

statements about the advantages of reduced costs of shipping, which are the sole purpose of global alliances. However, he stressed the other side of the coin – the costs paid by the ports. Larger vessels deployed by global alliances are handled in bigger ports, cutting off those which are not financially capable of deepening their waterways or investing in infrastructure required to handle such ships. LPA's President also expressed his concern towards the situation in Mediterranean ports, with which Pilar Parra Serrano, Director of Melilla Port Authority, agreed. While Giuliano Gallanti highlighted the unpreparedness and over-rivalrous approach instead of co-operation, Melilla Port's Director depicted the overcapacity of Spanish terminals' offer and a level of utilisation at around 40%, which can last for the next few years. "Extraordinary investments took place during the years

preceding the crisis, and today these facilities don't meet expected plans," she said, adding that another direction of this situation's development may be entering, not necessarily financial, more strategic cooperation with shipping companies – including as shareholders in seaport terminals. Nonetheless, this may influence cooperation between ports and terminals of one area, which is in line with the current high interest in the final outcome of the Trans-European Transport Network's objective. According to Pilar Parra Serrano, other advantages of global alliances include better service, a greater number of weekly rotations, as well as a reduction in service interruptions due to the cancellation of outputs.

Hrvoje Kulušić, the Port of Dubrovnik's Head of Technical Development and Maintenance, in the debate regarded alliances as generally positive undertakings, which add to the market's stability and widen the scope of customer services. Yet, he added

that such agreements should be regulated and controlled to make them transparent in order to avoid them turning into monopolies which could distort the market by fraudulent actions. Meanwhile, Krzysztof Gromadowski, Director of International Cooperation & Public Relations at Port of Gdynia Authority, questioned the stability of particular VSAs and the certainty to secure the return on the necessary port investments. Instead, he proposed agreements between the shipping lines' consortia and port authorities, which would cover long-term use of the modernized infrastructure as a solution. Another aspect of the issue according to Krzysztof Gromadowski, was a possibility of growing intra-VSAs competition, which is unfavourable to the 'outsiders', though a further concentration in the container shipping industry appears to be the only option to mitigate the economic and political differences in the global sea transport market. Moreover, Gdynia's Director of International Cooperation & Public Relations highlighted that it's the shipping lines that can choose their port of call, while the seaports obviously can't change their location. As the world's production and consumer power expand worldwide so do the number of destinations served by international shipping lines. In this situation it seems apparent that the companies have to coordinate the vessels with suitable equipment as well as manage the costs of the whole logistics chain. "Vessel Sharing Agreements comprise important tools to recuperate the costs of new tonnage ordered and continuously expensive bunker," said Gromadowski.

Ingrid Uppelschoten-Snelderwaard, Maersk Line's Managing Director East Central Europe, had a slightly different approach towards the controversial subject of seaports dealing with the global alliances. While she agreed with the other experts that some of the European ports are not well prepared for handling larger vessels, she assured that there will still be opportunities for these harbours. "The whole industry is not consolidating, it is a few big partners that are," stated Uppelschoten-Snelderwaard,



Krzysztof Gromadowski
Director of International Cooperation & Public Relations, Port of Gdynia Authority S.A

“From a port's perspective, VSAs can bring more, larger vessels, which are sometimes awkward to accommodate without heavy infrastructure investments. How about agreements between the shipping lines' consortia and port authorities, covering the long term use of the modernized infrastructure?”



Ingrid Uppelschoten-Snelderwaard
Managing Director East Central Europe, Maersk Line

“Terminals need to have a forward-looking attitude, because they need to adapt to what the shipping lines are doing. If the ports can keep up with shipping lines' pace, perhaps there is no limit to the increase in vessel size.”

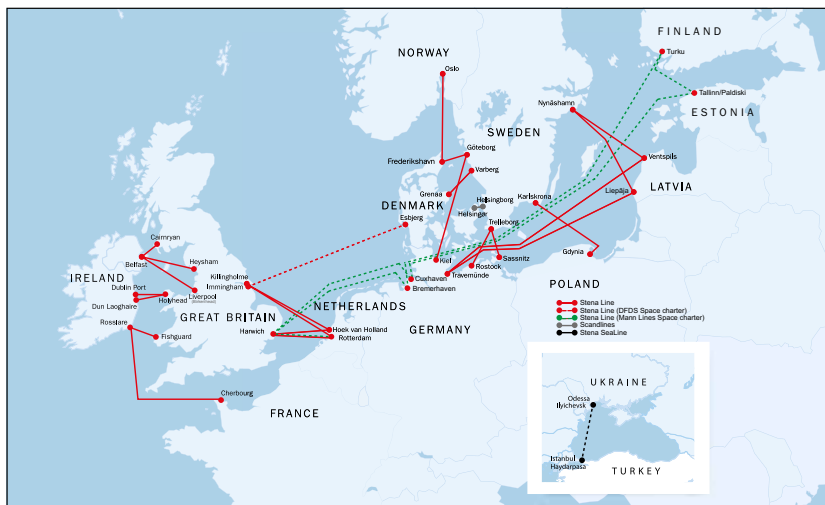


"Even though the biggest vessels won't come to certain ports, feeder vessels will come on smaller strings, bringing the cargo from hub locations to the specific destinations." Maersk Line's expert reflected on the future of the shipping industry's innovation not only on the side of shipping companies, but also in ports. According to

her, the key to their success is a forward-looking attitude and a willingness to adapt to future changes, especially that the industry has been experiencing constant growth for the last 30 years.

As the debating experts noticed, international organizations ought to take the initiative in analysing and controlling

alliances' actions. The situation might give cause for concern in ports, which do not meet the requirements for handling larger vessels deployed by alliances. Yet, the consolidation doesn't apply to the whole industry, therefore the harbours with smaller capabilities will still have their own customers. ■





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Conditions' shift at the core of business

by Marcin Wetnicki

European ports and shipping companies calling at them have ridden through many crossroads in the past, such as legislation changes, the SARS virus threat, competition from low-cost airlines and fixed links, loss of duty free, the worldwide financial crisis and eurozone problems, and most recently the Sulphur Emission Control Areas – splitting Europe in half.

These issues “have either drifted into history or have been coped with as part of the day-to-day competitive landscape,” wrote Dr. Bill Moses, Professional Marine Business Executive, Ferry Industry Consultant & Interim ‘Turnaround’ Manager, in *Harbours Review. European port sector forum* e-zine 3/2014. “But at a time when margins for most European ferry operators have been severely curtailed,” he continued, “a new, this time environmental gauntlet has been thrown down,” pointing to the more stringent Sulphur Directive, stretching in Europe from England’s Cornwall to each and every berth of St. Petersburg port as of January 1st, 2015.

Blasted sulphur, be gone!

“LNG distribution and the rules concerning stowage are in their infancy. Scrubber development perhaps needs more time; the device is not easily stowed particularly on ferries and ro-pax vessels where space is at a premium and has a discharge by-product that many omit from scrubber-related conversations. Then there is low sulphur diesel or Marine Gas Oil (MGO), more engine-friendly once converted, but with a potentially higher cost,” Bill Moses tackled the compliance ways out as well.

No matter the method of handling this hurdle, the repercussions of SECA are easy to predict. The cost of shipping will rise and the brunt of it will fall on the shoulders of the final consumers, as companies will be eager to shift them down the line. Bill Moses assessed that, “The swing from Heavy Fuel Oil (HFO) to MGO will surely cause the energy companies to change production levels. Price per tonne will become a little bit more pocket-friendly and we might also assume that heavy oil supply will decline and therefore prices could well increase, influencing those who operate to areas outside the SECA.”

The unavoidable rise in sea freight rates and passenger ticket prices might also favour fuel-efficient and cheaper shorter routes, although Bill Moses was not as certain about that. Besides the costs, he stressed a number of factors to be taken into account, like an operator’s ability to terminate their current port agreements or the availability and compatibility of facilities on shorter routes.

One thing Bill Moses believed might happen is an increase in road transport. “It is true that the economy will more than ever become the order of the day, more a necessity in some trades than others and in particular where operators compete with fixed links.” Although some companies



Dr Bill Moses

Professional Marine Business Executive,
Ferry Industry Consultant & Interim
‘Turnaround’ Manager

European shipping trade accounts for a considerable proportion of current tonnage and the swing from HFO to MGO will surely cause the energy companies to change production levels.

Competition in the European port sector

may settle on creating new terminals, the environment may stand in their way too – dredging limitations and concern over potential flora & fauna damage may make this option nearly impossible to achieve.

Dr. Kimmo Naski and Tommi Sievers from the Finnish Port of HaminaKotka agreed with the above assessments, even though the reasoning behind their opinions differs. “Sulphur-free bunker is currently 60-80% more expensive than the presently utilized fuel, and certainly additional demand will not decrease the price. It is likely that those who can switch to alternative modes of transport (such as road haulage) in order to cut down their bill, will do so,” as the options available to shipping companies are less than ideal. “The use of LNG is not even theoretically possible with all vessels currently operational, while it would be ridiculously uneconomical to convert those viable.” On top of that ports in the Baltic Sea region would have to set up proper LNG distribution infrastructure. On the other hand, Kimmo Naski and Tommi Sievers added, “Practice has shown that many

scrubbers do not work properly at sea, thus ships have to use diesel oil. Most probably about 90% of ships calling at Finland’s ports will shift to some sort of low sulphur fuel (like MGO or diesel) in January 2015.”

The representatives of the Port of HaminaKotka also tallied with that the SECA will amount to a EUR multimillion rise in costs that will be shifted to the shipping companies’ clients, impeding “Many investment decisions of the most fundamental business sectors located within the SECA,” and proposed that the EU governments should offset this by removing some taxes and dues. Guy Janssens, Policy Manager at the Antwerp Port Authority, agreed, “We challenged the European Commission to alleviate the financial impact of these measures; there are different working groups dealing with possible mitigation measures.”

Although Emanuele Grimaldi, CEO of the Grimaldi Group, also stated that the costs will go up (e.g. by 10% for Finnlines), he didn’t see it as a major problem. “It’s more or less the same our clients paid back to shipping transport companies due to general high fuel prices in 2012. If it wasn’t an issue for them then, what difference would it make today?” Furthermore, Emanuele Grimaldi was confident that Finnlines will not lose volumes to trucking companies, on the contrary, they may gain more traffic, as their steady and reasonable rate increase will reassure their clients about their reliability. All this thanks to their “fleet’s young age, its eco-friendliness and the EUR 100 mln scrubber investment programme,” adding “the competitive advantage of being able to further run on Heavy Fuel Oil in the Sulphur Emission Control Areas.”

Everyone sees the risks and benefits of SECA and everybody is preparing for the inevitable shift, but one thing still remains uncertain. What does this mean for the southern EU ports? The Mediterranean Sea will most probably see the stricter 0.1% bunker rules too, but no earlier than in 2025, which might be a chance for them to take some market share away from the leaders.

Roy Van Den Berg, Business Manager Logistics at the Containers, Breakbulk & Logistics department of the Port of Rotterdam, wasn’t sure a shift to the south would happen anytime soon. “A proper infrastructure is needed as well as services to and from various Mediterranean ports. Also, the deep-sea port infrastructure is not always sufficient to handle some large volumes of cargo or the big vessels. Some ports are ready for this, but not all of them.” Rather, Roy Van Den Berg named SECA as an opportunity for the biggest port in Europe. “It is possible that [the] share will increase after Jan. 1, 2015,



Dr. Kimmo Naski
*Managing Director,
Port of HaminaKotka*

The use of LNG is not even theoretically possible with all vessels currently operational, while it would be ridiculously uneconomical to convert those viable. Therefore, LNG is best suited for driving newbuildings. Practice has shown that many scrubbers do not work properly at sea, thus ships have to use diesel oil. Most probably about 90% of ships calling at Finland’s ports will shift to some sort of low sulphur fuel (like Marine Gas Oil or diesel) in January 2015.



Guy Janssens
*Policy Manager,
Antwerp Port Authority*

We’re in favour of SECA regulations having a larger scope, throughout the whole old continent. Perhaps in stages, but there are enough reasons to have the shipping sector moving in the right direction globally.



Photo: Lena Lorenz

because if deep-sea vessels only have to tranship cargo they carry in Rotterdam, instead of another North Sea port localized deeper in the SECA area, it could financially benefit shipping lines." Maybe if the southern ports could expand their inland infrastructure along with the services they offer, their position would change. "Until that time probably a lot of cargo will go via North Sea ports, like Antwerp, Rotterdam and Hamburg," he added.

The representatives from Hamina-Kotka agreed: "A combination of geographical and economic factors that still favours the northern ports for a number of specific reasons." They did, however, admit that there is a slow tendency to shift the EU's centre of gravity towards the east. "We see an increased role of Baltic ports, specifically Gdańsk and the East-Med., like Piraeus." It remains to be seen if they will seize the opportunity.

The leading ports of the North Sea (Rotterdam, Antwerp and Hamburg), welcome the SECA challenge and are prepared to expand both their immediate handling capacity, as well as inland infrastructure. Up-and-comers, like Algeciras or the ports of the Baltic Sea as a whole – seeing steady growth in throughput and importance for the EU – may become significant players in the European market. Meanwhile, as a consequence of SECA, the ports of the Mediterranean Sea, even though further from the EU's consumption centres than their northern rivals, might see a sharp rise in traffic, despite North Sea ports' reassurance that this won't happen any time soon.

Bigger is better?

Year after year three major players – Rotterdam, Antwerp and Hamburg – rise to the top of the charts. Rotterdam is the almost-uncontested leader in box turnover, Hamburg came close to taking the container crown in 2007/08, but since then the gap has steadily

been widening (from 1 mln TEU in 2008 to over 2.5 mln TEU four years later). Moreover, in 2014 Rotterdam's total handlings were again more than two times the throughput of the second busiest European port, Antwerp (444.7 mln tn compared to 199 mln tn), and more than Antwerp, Hamburg and Amsterdam's volumes summed (442.5 mln tn).

Rotterdam plans to maintain this lead in the coming years by focusing on several areas of improvement. Serving the shipping lines with the utmost efficiency and shortening the turnaround time in the port remain top priorities. Roy Van Den Berg stated his firm intends to expand its inland network in addition to the seaside one. "We already have a large volume and a strong position, which we want to advance further. To do this, we aim to improve the competitiveness of barge and rail transportation and minimize road transport. We also want to compete with other ports in more distant hinterlands where we have low market share



Emanuele Grimaldi

CEO of the Grimaldi Group

Judging the whole case from an economic perspective, and keeping in mind our huge scrubber investment, I do not see SECA as a problem for Finnlines. It is true that we will increase our freight rates by an average of 10%, which is more or less the same our clients paid back to shipping transport companies due to general high fuel prices in 2012.



Photo: Port of Rijeka



by establishing additional connections.” Rotterdam will achieve the latter by going straight to rail operators. With their partnership, the port hopes to encourage cargo flows to the as-of-now neglected regions.

That last strategy is especially important in light of the rising congestion in the area. Over the years Rotterdam has employed an array of varying solutions. The A15 Highway has been widened and local communities have been persuaded to change their work schedules from the typical 7:30-9:00 AM window, loosening the traffic. The port is also trying to enforce a modal shift from roads to rail and barges as the main means of transport. The concession contract for the new terminal stipulates a modal split

obligation, that in 2035, “A maximum percentage of containers that go/come to the Maasvlakte by road will be 35%; the other 65% needs to go by rail or barge,” Roy Van Den Berg explained. This has been done mainly for environmental reasons, but will also aid in lowering the congestion. And speaking about the new terminal, Rotterdam isn’t abandoning conventional growth strategies either. Maasvlakte 2 is maybe the biggest seaport infra civil engineering project in our corner of the world aimed at increasing the port’s already vast capacity (doubling it by an extra 17 mln TEU by 2033).

Antwerp, Europe’s third-largest container port, the second largest European port in total volume, as well as a market

leader in five out of six trade lanes (to South America, the US, Canada, Middle East, Indian subcontinent, Mediterranean and North-West Africa) is also readying itself for expansion and modernization, taking the “analyse, evaluate and respond” approach.

As explained by Guy Janssens and Annelies de Jongh, Business Development Manager at Antwerp Port Authority, the port is actively monitoring various trade lanes and assessing the most efficient way to attract more cargo. On the one hand, in a commercial role, it works directly with the volume-generating private companies to ensure it facilitates their interest best, on the other – it acts in a more



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Ferry Terminal Świnoujście is the largest one in Poland and one of the most modern terminals on the Baltic Sea. Its location on the shortest route between Scandinavia and Southern Europe has been considered a major advantage for many forwarders and passengers. It is the only Poland’s terminal to provide rail cargo handling to and from Sweden. Everyday the terminal offers 11 ferries departure to Sweden, creating virtual bridge between Świnoujście and Scandinavia. It is leader as regards number of calls as well as size of passenger and cargo traffic. The ferry traffic in Świnoujście has been growing every year and the terminal still have excess cargo handling and development potential.

We are open to new market trends and thus we are building a new ferry post to service ferries 220 m in length, that will improve the competitive position of the terminal on ferry transport market. The post will be ready in the middle of 2015. We also plan to accommodate Ferry Terminal Świnoujście to intermodal transport as the investment in the EU new budget period of 2014-2020. Another challenge is the creation of Motorway of the Sea linking Ferry Terminal Świnoujście with Trelleborg. The project received the decision of the European Commission for co-funding. We continue to develop our ferry handling system to meet top standards on the Baltic Sea.

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Photo: Port of Trelleborg

traditional way, expanding the infrastructure. The main priority seems to be keeping in line with increase in vessel size. To that end Scheldt river was deepened a few years ago, allowing the biggest container vessels to enter the port.

Unlike Rotterdam, Antwerp has so far been an almost hassle-free port regarding congestion, but that hasn't stopped the port authority from looking ahead into the future, addressing a potential problem and nipping it in the bud. According to last year's statistics, rail transport accounted for 11% of the modal split, barges – 37%, trucks – 47% and pipeline – 5%, but the port is looking to raise the share of the first two. The big expansion plans pertain chiefly to the left bank of Scheldt. The first major

investment has already been finalized: a new rail tunnel connects the left bank to Antwerp's hinterland, which is in turn located mostly on the right bank. "In our strategy we focus on rail bottlenecks, and we try to use TEN-T facilities to address them; furthermore we pay attention to smooth hinterland connections, especially the East-West ones," highlighted Policy Manager at the Antwerp Port Authority.

This development area, if fully utilized, would have a capacity of 1,000 ha. On top of that, Antwerp is not only handling, loading and discharging vessels, but is also the largest European chemical cluster, a lively focal point for the chemical industry, facilitating integration and interaction between different companies. "Antwerp has a lot of logistics warehouses, more than any other European port – 6.1

mln m²," Annelies de Jongh added. In other words, if the market demands it, the port can be industrialised further to meet its needs.

But the market is getting more and more complicated – as mentioned earlier, since the start of this year shipping companies operating in the EU need to take SECA into account. The Sulphur Directive restricts the maximum allowable sulphur content in ships' fuel to 0.1% across the Baltic and North Seas as well as in the English Channel and in North America (previously it was 1.0%). The shipping companies need to adapt quickly. There are several solutions, as mentioned earlier by Bill Moses, each one with its own benefits and drawbacks: utilizing Liquefied Natural Gas (LNG), investing in scrubber technologies or switching to low sulphur bunker such as diesel or MGO. Anticipating the market's response Antwerp port is preparing for LNG. "Investments are made in Antwerp's refineries to produce this kind of fuel," Guy Janssens concluded.

But frankly speaking, is it really that 'new' for ports and shipping companies to face new challenges and opportunities over and over? It's rather the core of this business, or in point of fact – doing business in general. The SECA is just another hurdle to jump over in the competition race, in which European ports also take part in order to be bigger, more efficient and eco-friendly, all because others are doing the same to outpace their north-south-east-west rivals. ■



Roy Van Den Berg
*Business Manager Logistics,
Containers, Breakbulk & Logistics,
Port of Rotterdam*

Because of the environmental concerns we implemented in the concession contract for new container terminals a modal split obligation, that in 2035 a maximum percentage of containers that go/come to the Maasvlakte by road will be 35%; the other 65% needs to go by rail or barge.



Annelies de Jongh
*Business Development Manager,
Antwerp Port Authority*

The market always follows trends in a natural way there is a combination of geographical and economic factors that still favours the northern ports for a number of specific reasons. The European population density and its production and consumption centres are located the closest to the Northern Sea ports and, more specifically, Antwerp. 60% of the purchasing power is within 500 km of the port. There are natural corridors like the Rhine, connecting Antwerp to the German area, as well as difficult to cross barriers within Europe, like the Alps. Then again we have the issue of increasingly larger vessels, which ply only on the Europe-Far East trade lane and have to be filled up; they cannot afford to sail at 50-60% capacity.

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Approaching Europe

by Magdalena Dams

Having a wide geographical range and functionally linking transport and other sectors, TEN-T core network corridors have the potential to stimulate socio-economic growth and prosperity in the EU. Although unprecedented, the programme will certainly bring benefits for the Member States and its citizens. Among many questions some particular ones arise: How to utilise the competence of corridor management bodies in mobilising the industry to the joint planning and implementation of the core network corridors? How to ensure that the core network corridors are attractive to the industry?



Dr. Wiktor Szydarowski

Freelance consultant, initiator and manager of transnational cooperation projects in the Baltic Sea region

Implementation of this policy instrument is unprecedented, which entails that the roles, responsibilities and development implications are fairly unknown to many stakeholders, in particular those that are not directly involved in the work or whose engagement in a corridor's planning and management activities has been low so far.

The investments, operations and doubts, which the stakeholders have to face, were discussed by industry experts in *Harbours Review. European port sector forum* 1/2015 (4). In this issue Dr. Wiktor Szydarowski, a freelance consultant, initiator and manager of transnational cooperation projects in the Baltic Sea Region, presented hopes and questions related to the TEN-T core network corridors.

TEN-T in theory

TEN-T guidelines focus on the nine core network corridors, each covering three transport modes and passing through at least three Member States. According to plans, by 2030 the corridors will enable seamless flows in the most strategic parts of the European transport network. This is to be accomplished through removed bottlenecks, built missing cross-border connections and facilitated modal operation and interoperability. The core network corridors are designed to make up the trans-European network, improving territorial cooperation and integrating urban areas.

As recapped by Wiktor Szydarowski, the core network corridors, as well as the

Motorways of the Sea, their maritime legs, will draw the most attention and financial resources from the EU funds, international financing institutions, national budgets and private donors. A broad range of stakeholders is to be involved in the undertaking, being supervised by European Coordinators supported by consultative corridor forums and thematic working groups of experts. According to the TEN-T guidelines, the management of corridors shouldn't create any administrative or financial burdens and the general approach towards them should be transparent.

The new TEN-T policy suggests that national transport infrastructure policies should be focused on implementing the core network, especially the nine corridors. Wiktor Szydarowski assessed that it will entail an acceleration of investment on cross-border links along corridors at the expense of missing links and bottlenecks in other parts of the network. Each core network corridor is different in terms of defining the scope of its implementation. Very often the cooperation offer is unattractive to stakeholders due to focusing on the pure transport actions in a particular

TEN-T core network corridors and infrastructure development

corridor, while leaving out the cross-sectorial issues. In this case, it provoked questions concerning the adaptation of mobility-boosting measures in the corridor work plans to the sustainable socio-economic growth in the regions affected by the core network corridors.

Another problematic aspect is that the core network corridors were created by connecting the main urban centres, large ports and the most important border crossing points with lines symbolising multimodal links; some of them were overstretched in order to connect the biggest amount of countries. This resulted in extremely long special structures that do not necessarily correspond with real flows. In this situation the remote areas of the Nordic countries seem to be the underdog, with too little volumes and less “valuable” infrastructure for the European transport policy. “Questions arising from this fact include the issue of the accurate measures that are needed to functionally connect the remote areas to

the core network corridors,” highlighted Dr. Szydarowski. He also wondered why the Oslo-Stockholm link was disqualified from the Scan-Med Corridor even though it used to be a part of the Nordic Triangle.

Concluding his expertise, the initiator and manager of transnational cooperation projects in the BSR reminded that having a lot of experience with governing international freight corridors in alliances between public and business stakeholders, the Baltic Sea region’s existing corridor management bodies have already delivered many interesting solutions. Their approach centred on greening the transports while making the corridors market-attractive through service reliability, limited congestion, better safety and low operating and administrative costs. These bodies, he stated, should also be able to mobilise the industry to the joint planning and implementation of core network corridors, but first of all, these corridors should become attractive enough for the industry.

TEN-T in practice

Experts’ opinions about core network corridors shared during the *Harbours Review* debate were generally flattering, however each of them had its own precariousness towards some of the programme’s aspects. Guy Janssens, Policy Manager at Antwerp Port Authority, expressed his concerns towards implementing the new TEN-T policy. The Port of Antwerp, closely monitoring the process of carrying out the programme, has hoped that the objective of producing European-wide added value would dominate national agendas of each Member State. In Janssens’ opinion the European Commission should assure that it will stick to the criteria stated in the TEN-T regulation and not yield to bigger countries with stronger voice.

Alecos Michaelides, Chairman of Cyprus Ports Authority, on the other hand, was dubious about the use of



Guy Janssens

Policy Manager at Antwerp Port Authority

“We have observed all Member States giving their wish list to the European Commission – with the larger Member States having the stronger voice and often a bigger lobby. We hope that the Commission will stick to the criteria stated in the TEN-T regulation.



Alecos Michaelides

Chairman of Cyprus Ports Authority

“The complexity of the Corridors is a real challenge. Coherent and constant communications are crucial for succeeding in having a harmonized corridor approach. Synergies will be sought with other Corridors notably in addressing the administrative, technical and operational barriers especially on sections where new cross-border projects are being developed.



Magnus Kårestedt

CEO, Port of Gothenburg

“The core network isn’t only about physical infrastructure or pointing out sea routes to make the picture fuller. Having an efficient intra-European combined traffic demands also less red tape, while EU-wide port legislation should be harmonized, so that e.g. Swedish, German or Dutch fairway dues should be alike.



financial instruments exploited in the projects. In the current financial environment in some of the Member States, such as Cyprus, there has been a great possibility of delays in implementing the program, caused by the difficulties in obtaining financial support for transport. Apart from that, Mr. Michaelides has been rather positive about the core network corridors. "The provision of high quality enduring transport infrastructure along these transport corridors will act as a catalyst for growth," he said and continued that "they will ensure the safe and efficient flow of passengers and freight and will play an important role in connecting the remote areas with industrial and large scale logistic centres, thereby strengthening regional and national economies and creating opportunities for new jobs and business." Moreover,

he related to the corridor forums and thematic working groups, mentioned by Dr. Szydarowski, as the solution for meeting the challenge of strong coordination between the stakeholders of different modes of transport.

Magnus Kårestedt, the Port of Gothenburg's CEO, highlighted the meaning of multimodality in international transport in Europe with a special emphasis on ports as sea-rail-road junction nodes. However, in Gothenburg's CEO's opinion, there are a few debatable issues. Firstly, the programme seems to have brought forth north-south links, but at the same time east-west routes were sometimes left out. Secondly, the way the ports are being shown in corridors ought to be changed. As an example, he mentioned the Scan-Med corridor, which focuses on roads and rail lines, while the Motorways of the Sea seem to be set aside. Meanwhile, Alecos Michaelides

had high hopes for these routes – Cyprus, being an island located in the proximity of two other continents, can greatly benefit from the implementation of MoS.

The Scan-Med corridor also raises voices in other Nordic ports. Sandra Gegerfelt, Policy Advisor and EU-Coordinator at the Ports of Stockholm, said that many harbours and other infrastructure owners are already investing in infrastructure in the corridor. As an example, she mentioned a new collaboration between the Ports of Stockholm and Finnish core network ports operating under the name of "The Northern Scan-Med Ports". The members of this partnership are investing over EUR 200 mln between 2014-2016 in order to provide sustainability, efficiency and multimodality in this section of the corridor. Additionally, the Ports of Stockholm invest in their development projects contributing to the implementation of TEN-T policy. According to



Sandra Gegerfelt

*Policy Advisor & EU-Coordinator,
Ports of Stockholm*

Clearly, there are conflicts of interest when the national governments must weigh local and regional infrastructural needs in more remote areas against the EU's priorities in their national budgets.



Johan Röstin

*Chief Executive Officer,
Copenhagen Malmö Port*

At the beginning, the ports' voice was not heard and the policy mainly dealt with road and rail separately. As a consequence, the activities were not sufficiently directed towards supporting short sea shipping, and there were bottlenecks and other obstacles in the way of setting up an efficient multimodal transport infrastructure. This changed with the new TEN-T policy and CEF approach.



Olli Keinänen

*Chief Advisor,
Helsinki-Uusimaa Region*

Helsinki is one of the few nodes in the BSR, where core network corridors cross each other. As Finland is logistically situated on an island, improved access to land transportation corridors is our strategic goal. The question of accessibility is crucial in unveiling the economic growth potential that can intensify business and labour mobility in the region.



Johan Röstin, CEO of Copenhagen Malmö Port, the Scan-Med corridor, however, mainly focuses on upgrading rail infrastructure. While Magnus Kårestedt expressed his concerns towards this approach, CMP's CEO added that railway transport will allow the development of greener transport in Europe and will improve ports' hinterland connections, nonetheless agreeing that more attention needs to be paid to short sea shipping. Luckily, he stressed, the Blue Belt strategy of the "EU without borders on the sea" as well as the modified customs control panel will be useful tools to help improve this situation.

Cooperate and prosper

Helsinki metropolitan region in Finland is situated on the crossing of two core network

corridors. However, as said by Olli Keinänen, Chief Advisor at Helsinki-Uusimaa Region, "Finland is logistically situated on an island" and thus its main international transport node needs improved access to land transportation corridors. Olli Keinänen envisaged Rail Baltica and the core network corridor located on the Eastern side of the Baltic Sea as well as Helsinki's collaboration with Baltic Metropoles cities as a way for the region to become greener and more accessible.

The new TEN-T policy's great advantage is the opportunity for infrastructure owners to develop and improve. Zbigniew Mikiewicz, President of the Management Board at the Szczecin and Świnoujście Seaports Authority, brought up the amount of investments, which will be held in the near future, thanks to the new financial

framework. Moreover, Szczecin and Świnoujście are included in the Baltic-Adriatic corridor as MoS Świnoujście-Trelleborg. As opposed to some slightly concerned voices from the Scan-Med corridor, Zbigniew Mikiewicz expressed his hopes towards the fact that the ports' hinterland and foreground offer will be strengthened.

The TEN-T guidelines are also beneficial to inland nodes. Lord Mayor of City of Frankfurt am Main, Peter Feldmann, emphasized the influence of the core network corridor in big European cities. Not only will the infrastructure projects be less difficult to finance, thanks to core network corridor financial instruments, but also the urban traffic systems are likely to be improved,

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as TEN-T is geared to enable municipalities to implement key infrastructure measures. Horst Sauer, who is a specialist at the Joint Spatial Planning Department in Berlin-Brandenburg, added that corridors crossing bigger cities contribute to generating regional added value by the handling and distribution of goods and other related services. In addition, what benefits

cities is innovation, investment and experience from other cities. That is why Berlin teamed up with other Baltic Metropoles – “to work with other cities and regions in order to place itself competitively as well as assist interested small and medium-sized businesses,” Horst Sauer indicated.

Based on the opinions of Dr. Wiktor Szydarowski and other industry experts, it can be stated that every European region

has to deal with different barriers related to the TEN-T policy and has slightly different expectations towards it. While for some several aspects of the core network corridors are a great chance, in other regions these ideas need refining. Nonetheless, the TEN-T programme is seen as an exceptional prospect for further development and integration of the European transport sector. ■



Zbigniew Miklewicz

President of the Management Board at the Szczecin & Świnoujście Seaports Authority

What's extremely important, corridors do not form an isolated world with a life of their own, but constitute a Europe-wide network. By being TEN-T core ports Szczecin and Świnoujście have entered into an essential development stage in order for them to receive bigger vessels and handle more cargo in a faster manner in the future.



Peter Feldmann

Lord Mayor of City of Frankfurt am Main

TEN-T is geared to enable municipalities to implement key infrastructure measures for which insufficient national financing is available. For instance, of the planning costs for a regional public train link and terminal at the new Gateway Gardens district next to Frankfurt Airport, envisaged to handle 18,000 commuters daily, 50% could be covered by TEN-T.



Horst Sauer

Joint Spatial Planning Department, Berlin-Brandenburg

The East-West or North-South freight transportation corridors that simply cross the metropolitan regions is not what benefits them. Rather, it is the regional added value generated by the handling and distribution of goods and related additional services.

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Are box terminals lagging behind?

by Erik Lampinen, *Business Development Manager at Hogia Logistics Solutions*

Innovations – or a lack of them – in modern container terminals is somewhat a contradiction. The idea of the container itself, a standardized and global solution for transport of goods, requires a long-term mindset of seamless solutions for the end-to-end process. In other words, a container is innovation. But is it in fact still so?

When it comes to box handlings, no important player in the industry is resting on its laurels. In the wake of implementing the new EU TEN-T policy, heavy investments have been made or are in the pipeline for the coming decade. Add to that all the grandiose plans where basically everyone is fighting for the same volumes and it becomes clear that innovation must be about operational efficiency, better structure and cost-savings in order to stand out from the crowd, survive fierce competition and grow.

However, imagine the opposite: an ever-changing “development” of the container, its dimensions, shape and materials. Such scenario would create chaos in ports and intermodal terminal operations worldwide. At the time of loading a vessel or truck, the situation would soon be unmanageable and the container era would probably face a sudden end.

Many box terminals I've visited during my travels around Europe have made substantial investments in new handling equipment such as e.g. reachstackers, in freshly paved yards and top-of-the-line warehouse solutions. Less attention has been paid to the soft infrastructure such as Terminal Operating Systems (TOS), which surprisingly often is an outdated in-house developed software, generated some 10 years ago – light years in the IT business. Neither has any review of the

organisation been done lately – namely, who's actually doing what, where and for whom. Quite a few companies are stuck in old habits and focus on internal issues, inside-out, instead of applying the modern times' customer's point of view, outside-in.

As a TOS producer, innovations, efficiency and effectiveness are part of the company culture, our genes so to say. We develop software that is associated with best-practice processes which in turn create an efficient and top-down modern terminals at all levels.

Implementing a modern TOS at a terminal, and using correctly its features, triggers improvement of local processes. The terminal can handle increasing volumes with existing resources, or reduced costs per convenience. It also creates a value of simplified and better performance monitoring, improved cash flow, etc. But maybe it's best to let the numbers do all the talking.

First, production. Thanks to software-backed operations, increased volumes by 30% in the annual volume of 100,000 units would provide 30,000 additional containers per EUR 20 each, corresponding to an increase in revenue of EUR 0.6 mln annually, based on existing resources in staff and equipment. Second, staff. Reduced load on operational staff with 20% savings on annual wage, or alternatively the number of overtime hours reduced and the cost of additional staff avoided. Streamlining administration with 80% savings due to automated process and integration with internal and external

stakeholders, avoiding the current extended use of worksheets. Through integration and automation efficiency can be created, freeing up resources for use elsewhere in the organization. Third, service and maintenance. Utilities 20% savings on an annual service cost of EUR 25,000 for a reachstacker, equivalent to EUR 5,000 per reachstacker; a regular-sized terminal will multiply the savings. This calculation is based on service (small and large) and hours of operation. There's always a possibility of better planning to streamline loading and unloading. Reduced number of hours of operation also gives a higher resale value.

Fourth, fuel costs, with 30% savings on an annual fuel cost of EUR 35,000, corresponding to EUR 10,500 per reachstacker (the calculation is based on actual information and hours of operation). Here's also always a possibility of better planning to streamline loading and unloading, reducing the number of idle hours and search for units.

Five, the environmental impact. Reduced hours and more effective operating hours enable the container terminal to meet increasingly stringent environmental requirements from society and policy makers.

Last, but not least, I cannot stress enough the importance of overhauled processes – only with a holistic point of view of your business, can you achieve synergies resulting in running a modern terminal, and doubtless, it requires an innovative mindset as well as investments in resources and time. But the idea is straightforward at all times – software can boost hardware, just give it a shot. ■



Modern era container terminals

Container pick-up using e-signatures

by **Maxim Maximov**, *Commercial Director, SOLVO*

“Time is money,” the saying goes. While having a chance to axe down unnecessary formalities, which would in turn result in cost savings, who would not seize such an opportunity? Automation – and e-automation in the case of container terminals – is the new black, be it for security issues (e-signatures) or pre- and on-site operations. If implemented accordingly, handling containers is as simple as two clicks and off the trucks go.

One of the main goals of implementing the information management system at container terminals is a reduction in paperwork. In some cases, it is not possible to entirely eliminate the usage of paper as it may be required by law. However, certain situations could arise when a transition to paperless documentation is possible and not merely justified by the conservation of paper. More importantly, it could present a significant advantage for all business process participants. One such example which has been successfully implemented in practice is the export of containers using electronic authorizations with electronic signature verification. Leading maritime container terminals of Saint-Petersburg are currently using e-authorizations signed with e-signatures for the pick-up of import containers at the port. Among these is our client, ZAO Container Terminal Saint-Petersburg (CTSP), which I will use as an example to analyse the effectiveness of this technology.

Electronic signatures have been used in Russia since 1994, when the main communications security branch of the Federal Agency of Government Communications and Information developed the first Russian e-signature standard – GOST R 34.10-94, which was later supplanted by a new standard, GOST R 34.10-2001. Today, any issue involving the usage of electronic signatures is regulated by federal law, RF No. 63-FZ “On electronic signatures” from April 6th, 2011. The introduction of a given technology at CTSP was initiated

by company management to reduce the risk of forgery and, correspondingly, to eliminate the issue of cargo to unscrupulous carriers or violators of the law as well as speed up document processing at the service centre.

The automation of technological processes and other processes related to documentation and record-keeping is performed at CTSP with the help of a complex information management system, SOLVO.TOS. This system includes the web-portal feature, through which forwarders and CTSP’s clients can view information regarding their containers, file truck visit requests, and formalize authorizations for container pick-up. To formalize an authorization, the forwarder must log into the CTSP web-portal through the Internet, where he must select the required container from a list of containers that have been nominated for their shipping line, and then register the authorization for a driver (physical person). Due to the fact that all drivers and trucking companies must pass preliminary accreditation, this process can be completed with two clicks: the forwarder selects the driver from a list and presses “Create authorization text.” The authorization validity period, as a rule, will correspond to the time period allocated for the release of the shipping line. The only thing left now is to sign the authorization using an e-signature – which is also done right on the web-portal.

In order to formalize an authorization with an e-signature, the forwarder must conclude an agreement with the certification centre beforehand. Within the context of this agreement,

the forwarder receives a signature key certificate, which is used to validate authorizations with an e-signature. After the forwarder has signed the authorization on the web-portal, its status is changed to “Verifying.” Meanwhile, the signature, its expiration date, etc., is checked by a certified software program. This procedure can take on average from 3 to 5 minutes for each authorization. The given system achieves a high level of security since, in addition to the electronic key, the forwarder must also need a web-portal username and password (the web-portal itself is secured against automatic registration) to access the web-portal information, and must also be approved in the SOLVO.TOS system kernel.

The forwarder can only register a truck visit request for the pick-up of a container on the web-portal if the authorization has been verified. The management system makes it easy to configure rules for each forwarder individually and whether he will use electronic authorizations with e-signatures or the more traditional method. In the former case, the driver arriving at the container terminal must have a passport to be processed at the service centre. In the latter case, he must obtain a validated paper authorization from the forwarder in advance, which translates into an additional hassle and paperwork not only for the driver and the forwarder, but for the container terminal as well. ■

Top EU ports 2014

by Przemysław Myszka

Both when it comes to the overall total as well as container handlings, the Top 3 harbours in the European Union for a number of years have been lining up as follows: Rotterdam, Antwerp, and Hamburg.

The European port sector's landscape is currently experiencing major challenges, whether as regards to traffic growth, necessary investment, societal and environmental concerns, or congestion both within the harbours and in the hinterland – to name just a few. The European Union wouldn't be able to prosper without its seaports, being a true engine of economic growth, altogether directly employing around 1.5 mln people. 328 of those harbours are part of the TEN-T network.

With the Union's expansion, more business are redirecting their manufacturing and logistics operations to Central and Eastern Europe. As you can read on the pages of the HR's e-zine 3/2014 edition (www.harboursreview.com) in the interview entitled "A port's work is never done", Guy Janssens, Antwerp Port Authority's Policy Manager highlighted that the centre of gravity of the European production base is currently shifting towards the East. Therefore, Western European seaports have to work harder to maintain their competitive

Tab. 1. Top 15 EU harbours handlings [mln tn]

No.	Country	Port	2014	2014/13 change [%]	2013	2013/12 change [%]	2012	2012/11 change [%]	2011	2014/11 change [%]
1	NL	Rotterdam	444.7	+1.0%	440.5	-0.2%	441.5	+1.6%	434.6	+2.3%
2	BE	Antwerp	199.0	+4.3%	190.8	+3.6%	184.1	-1.7%	187.2	+6.3%
3	DE	Hamburg	145.7	+4.7%	139.1	+6.3%	130.9	-1.0%	132.2	+10.2%
4	NL	Amsterdam	97.8	+2.2%	95.7	+1.5%	94.3	+1.4%	93.0	+5.2%
5	ES	Algeciras	88.1	-2.3%	90.2	+2.2%	88.3	+7.4%	82.2	+7.2%
6	FR	Marseilles	78.5	-1.9%	80.0	-6.5%	85.6	-2.8%	88.1	-10.9%
7	DE	Bremerhaven	78.3	-0.6%	78.8	-6.2%	84.0	+4.2%	80.6	-2.9%
8	ES	Valencia	71.85	+11.2%	64.6	-1.7%	65.7	-0.2%	65.8	+9.2%
9	FR	Le Havre	66.9	-0.4%	67.2	+5.8%	63.5	-6.1%	67.6	-1.0%
10	UK	Immingham-Grimsby ¹	59.4	-4.2%	62.0	+3.2%	60.1	+5.1%	57.2	+3.8%
11	IT	Trieste	57.15	+1.0%	56.6	+15.0%	49.2	+2.1%	48.2	+18.6%
12	RO	Constantza	55.6	+0.9%	55.1	+8.9%	50.6	+10.0%	46.0	+20.9%
13	IT	Genoa	51.0	+5.2%	48.5	-3.4%	50.2	-0.4%	50.4	+1.2%
14	FR	Dunkirk	47.1	+8.0%	43.6	-8.4%	47.6	+0.2%	47.5	-0.8%
15	UK	London	43.2	+/-0.0%	43.2	-1.1%	43.7	-10.5%	48.8	-11.5%
Total			1,584.3	+1.8%	1,555.9	+1.1%	1,539.3	+0.6%	1,529.4	+3.6%

¹ Operated jointly by Associated British Ports
Source: Port of Rotterdam Authority; port statistics; UK's Department for Transport



position. But what's the situation now, what do last year's charts look like?

With a 444.7 mln tn score in 2014, the Port of Rotterdam handled more than 2nd-placed Antwerp (199.0 mln tn), 3rd Hamburg (145.7 mln tn) and 4th-placed Amsterdam (97.8 mln tn) combined (442.5 mln tn). What's interesting as well, in 2014 Valencia and Le Havre again swapped ranks in the chart, this time the Spanish harbour overtook the French one (in fact, this is the only up/down change in the presented tables).

However, differences between the Big EU Trio are more subtle when it comes to box turnover. Rotterdam still champions the chart with 12,298 thou. TEU passing through the port's quays last year, but

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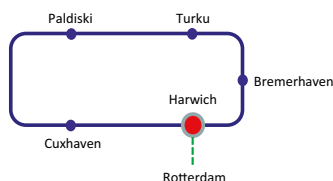


Schedules:

1. Service:

- Paldiski
- Turku
- Bremerhaven
- Harwich
- Cuxhaven

Thursday
Friday
Sunday
Monday
Tuesday



- Rotterdam
- Harwich
- Rotterdam

Daily Service

MannLines Multimodal



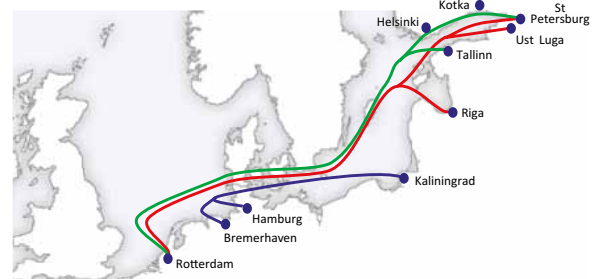
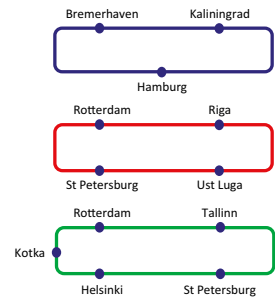
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Schedules:

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- Bremerhaven
- Kalliningrad
- Hamburg
- Rotterdam
- Riga
- Ust Luga
- St Petersburg
- Rotterdam
- Tallinn
- Kotka
- Helsinki
- St Petersburg





Tab. 2. Top 15 EU container harbours handlings [thou. TEU]

No.	Country	Port	2014	2014/13 change [%]	2013	2013/12 change [%]	2012	2012/11 change [%]	2011	2014/11 change [%]
1	NL	Rotterdam	12,298	+5.8%	11,621	-2.1%	11,866	-0.1%	11,877	+3.5%
2	DE	Hamburg	9,729	+5.1%	9,257	+4.4%	8,864	-1.7%	9,014	+7.9%
3	BE	Antwerp	8,978	+4.7%	8,578	-0.7%	8,635	-0.3%	8,664	+3.6%
4	DE	Bremerhaven	5,796	-0.6%	5,831	-4.6%	6,115	+3.4%	5,916	-2.0%
5	ES	Algeciras	4,555	+4.9%	4,343	+5.6%	4,112	+34.2%	3,063	+48.7%
6	ES	Valencia	4,442	+2.6%	4,328	-3.2%	4,470	+3.3%	4,327	+2.7%
7	UK	Felixstowe	4,100	+19.4%	3,434	+2.0%	3,367	+3.6%	3,249	+26.2%
8	GR	Piraeus	3,600	+13.8%	3,163	+15.7%	2,734	+62.8%	1,679	+114%
9	IT	Gioia Tauro	2,970	-4.2%	3,100	+13.9%	2,721	+18.0%	2,305	+28.9%
10	MT	Marsaxlokk	2,900	+13.7%	2,550	+6.3%	2,400	+1.7%	2,360	+22.9%
11	FR	Le Havre	2,554	+2.7%	2,486	+7.9%	2,303	+4.0%	2,215	+15.3%
12	BE	Zeebrugge	2,047	+1.0%	2,027	+3.8%	1,953	-11.5%	2,206	-7.2%
13	IT	Genoa	2,173	+9.3%	1,988	-3.7%	2,065	+11.8%	1,847	+17.7%
14	ES	Barcelona	1,893	+10.1%	1,720	-2.2%	1,759	-13.6%	2,035	-7.0%
15	UK	Southampton	n/a ¹	–	1,488	+1.0%	1,473	-7.4%	1,590	–
Total			68,035²	+5.6%²	65,914 (62,131)²	+1.7%	64,837	+4.0%	62,347 (60,757)²	+12.0%²

¹ DP World, operator of the container terminal in Southampton, does not reveal detailed TEU turnover statistics of its facilities

² Total and year-on-year change for the Top 14 ports

Source: Port statistics; Port of Rotterdam Authority; the UK's Department for Transport

Hamburg (9,729 thou. TEU) and Antwerp (8,978 thou. TEU) are trading on Rotterdam's heels, whilst 4th-placed Bremerhaven did almost 50% of the top's result.

The EU's majors are still located in the "old" (pre-2004) part of the Community, with the notable exceptions of the Romanian Port of Constantza (the overall throughput) and the Maltese Marsaxlokk (containers). Gdańsk, leader of the EU's Baltic Sea region and the EU's 18th largest container port with 1,212 thou. 20-footers in 2014, still

has some work to do in order to overtake 17th-placed Sines (1,228 thou. TEU in 2014 thanks to a notable 31.9% year-on-year growth), 16th placed La Spezia (1,303 thou. TEU) and even more to outpace Southampton (in the 15th spot in 2013 with 1,488 thou. TEU; data for 2014 unavailable due to DP World's secret statistics policy). The same goes for EU Atlantic and the Bay of Biscay ports – Las Palmas (976,457 TEU), Leixões (666,661 TEU), Bilbao (630,886 TEU) as well as Lisbon (502,186 TEU). ■



Photos: Lena Lorenc

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Knut Fleckenstein MEP
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Top Baltic ro-ro & ferry ports 2014

by Marek Błus and Monika Rozmarynowska

The Baltic Sea is by all means a region which has been standing on two maritime legs for decades, namely ro-ro and ferry, and long before containers seized their portion of market share. Last year, a total of over 8.4 mln cargo units (trucks, trailers, railcars) were carried on-board more or less 170 ro-ros and ro-paxes of 30 shipping operators, whose services translate into thousands of km of sea-moving bridges and motorways provided on a daily basis.

Tab. 1. Top 30 ro-ro & ferry ports in the Baltic Sea (2014) – freight units

		Port	2012	2013	2014	2014/13 yoy
1	DE	Lübeck/Travemünde	730,234	733,391	744,860	+1,6%
2	SE	Trelleborg	648,991	645,696	670,776	+3,9%
3	FI	Helsinki	501,465	485,816	503,354	+3,6%
4	SE	Gothenburg	480,797	479,528	497,609	+3,8%
5	DE	Rostock	428,205	424,089	444,781	+4,9%
6	DE	Puttgarden	369,871	389,344	412,151	+5,9%
7	DK	Rødby	369,871	389,344	412,151	+5,9%
8	EE	Tallinn	354,300	353,700	377,316	+6,7%
9	DK	Helsingør	365,833	360,840	375,450	+4,0%
10	SE	Helsingborg	422,922	366,082	369,908	+1,0%
11	PL	Świnoujście	306,446	324,422	341,782	+5,4%
12	SE	Malmö	226,071	223,640	218,814	-2,2%
13	SE	Ystad	193,261	214,942	218,790	+1,8%
14	DE	Kiel	208,859	191,951	191,000	-0,5%
15	LT	Klaipėda	189,382	185,726	178,627	-3,8%
16	SE	Stockholm	177,603	188,185	176,677	-6,1%
17	FI	Hanko	120,884	149,340	162,880	+9,1%
18	SE	Kapellskär	163,032	153,315	159,017	+3,7%
19	DK	Frederikshavn	157,884	156,041	154,454	-1,0%
20	PL	Gdynia	116,301	126,897	141,670	+11,6%
21	DK	Hirtshals	125,675	128,199	137,868	+7,5%
22	FI	Turku	116,593	127,805	123,141	-3,6%
23	SE	Karlskrona	86,868	102,800	116,828	+13,6%
24	RU	Ust-Luga ¹	69,000	88,000	110,000	+25,0%
25	FI	Naantali	129,100	102,060	99,454	-2,6%
26	DK	Gedser	89,966	91,293	96,348	+5,5%
27	SE	Nynäshamn	80,587	69,103	83,743	+21,2%
28	DK	Esbjerg	102,000	72,000	74,000	+2,8%
29	LV	Ventspils	69,812	68,100	72,758	+6,8%
30	RU	St. Petersburg ¹	49,000	84,000	72,000	-14,3%

¹ estimated

The Baltic Top 11 ro-ro & ferry freight harbour team comprises ports with an annual handling of 300+ thou. cargo units, starting with Świnoujście's 341.8 thou. last year, up nearly twice as much as was handled in Lübeck/Travemünde on the winner's stand (744.9 thou.; see Tab. 1). In turn, over half of the top pax chart consists of the cargo leaders (namely Helsinki, Tallinn, Helsingborg, Helsingør, Puttgarden and Rødby), with the Finnish capital port landing in first place as the only one which has broken the 10 mln passengers threshold year after year (Tab. 4).

A demanding market, fierce competition and uncertain economic conditions led to the phenomenon which characterised year 2014 – less ships, reduced tonnage leading to more work, since volumes grew, regarding both cargo and passengers. Although some services were closed or decreased their frequency, the network as a whole and in its particular parts was more efficient than in 2013. The case is reflected in port volumes – e.g. Esbjerg, despite losing a ro-pax service to Harwich in September 2014, handled more units than in 2013 (position 28 in Tab. 1). Since then cargo flows to and from the UK have been concentrated in the link to Immingham, served (like before) by two ro-ro vessels. On the other hand, passenger traffic in

Tab. 2. Joint ferry and ro-ro fleets of the Baltic operators (April 2015)

Operator	Service type	Vessels	GT	Lane meters	Lane performance [km/km per week]
Finnlines	ferry/ro-ro	22	644,784	67,032	223,870
Stena Line	ferry	17	511,972	36,696	109,065
DFDS Seaways	ferry/ro-ro	17	493,304	48,751	185,640
Tallink/Silja	ferry/ro-ro	12	483,815	15,557	47,860
Viking Line	ferry	7	264,491	6,535	20,960
Color Line	ferry	6	250,148	7,518	30,361
Transfennica	ro-ro	10	225,881	24,214	116,755
TT-Line	ferry/ro-ro	6	179,391	14,600	49,925
SOL Continent Line	ro-ro	7	149,785	15,826	53,310
Unity Line	ferry	7	139,821	10,736	25,260
Scandlines	ferry	12	135,879	6,185	19,780
SCA Logistics	ro-ro	5	102,875	10,500	35,000
CldN	ro-ro	4	92,964	9,993	32,708
Fjord Line	ferry	4	86,826	3,420	14,700
Destination Gotland	ferry	4	71,678	3,500	12,820
St. Peter Line	ferry	2	71,676	2,135	4,760
Pölderries	ferry	3	66,950	3,548	11,094
Færgen	ferry	8	55,829	3,115	6,482
Eckerö Line	ferry	2	48,723	2,490	5,754
Black Sea Ferry	ro-ro	2	45,479	3,290	10,020
Smyril Line	ferry	1	35,966	1,830	4,480
Mols-Linien	ferry	3	26,621	1,134	3,596
Wagenborg Shipping Sweden	ro-ro	2	24,920	3,332	9,130
Mann Lines	ro-ro	1	24,688	3,000	13,320
Navirail	ferry	1	20,921	1,400	1,900
Anship	ro-ro	1	20,729	1,787	7,250
Sea-Cargo	ro-ro	2	18,563	2,882	6,510
Wasaline	ferry	1	17,503	1,150	2,025
ULS Estonia	ferry	1	7,654	590	660
Lillgaard	ro-ro	1	6,040	780	1,220
Total		171	4,325,876	313,526	1,066,215

Esbjerg stopped completely, which will be reflected in the 2015 statistics. The closure of the last passenger connection between Scandinavia and the UK marks regularity that a statistical travelling person switches to the shortest routes – in the list of Top 10 passenger ports (Tab. 4) turnover grew only in places where traffic is based on short services. An exception are terminals in both ends of the link across the Øresund competing with the Øresund Bridge.

Turning our eyes to fleet operators, the BSR market (as of April, 2015) is served by 30 shipping companies, some of them pure ro-ro (like Transfennica and SCA Logistics), focused solely on ferry traffic (e.g. Viking Line and Stena Line), or combining their offer by offering both pure freight routes as well as ro-pax ones (Finnlines, DFDS Seaways, Tallink, to name just a few; see Tab. 2). During 2014 the Baltic ferry and ro-ro fleet consistently diminished – some units were sold, chartered out or transferred to other markets. Comparing our spring



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Tab. 3. Performance of selected sea-bridges and sea-motorways (2014)

Route	Operator	Class	Distance (naut. miles)	Distance [km]	Pax [thou.]	Cargo units [thou.]	Cargo units [thou. tonnes]	Transport work [mln tn-km]	Transport work [mln pass-km]
Helsingborg-Helsingør	Scandlines	short bridge	2	5	7,635	375.4	4,420	22.1	38.2
Spodsbjerg-Taars (LangelandsFærgen)	Færgen	short bridge	8	15	506	49.7	392	5.9	7.6
Puttgarden-Rødby	Scandlines	short bridge	10	19	6,002	412.1	6,295	119.6	114.0
Rostock-Gedser	Scandlines	long bridge	27	50	1,363	96.3	1,641	82.1	68.2
Ystad-Rønne (BornholmerFærgen)	Færgen	long bridge	37	69	1,313	4.9	94	6.5	90.6
Helsinki-Tallinn	Tallink	long bridge	48	89	4,518	167.4	2,511	223.5	402.1
Gothenburg-Frederikshavn	Stena Line	long bridge	50	93	1,293	155.9	2,338	217.4	120.2
Visby-Oskarshamn	Destination Gotland	long bridge	65	120	426	21.7	310	37.2	51.1
Visby-Nynäshamn	Destination Gotland	long bridge	78	144	1,204	23.9	292	42.0	173.4
Trelleborg-Rostock	Stena Line	shuttle motorway	83	154	321	141.2	2,118	326.2	49.4
Hirtshals-Larvik	Color Line	long bridge	90	167	725	65	541	90.3	121.1
Świnoujście-Ystad	Polferrys	shuttle motorway	95	176	169	58.6	879	154.7	29.7
Świnoujście-Trelleborg	Unity Line	shuttle motorway	96	177	26	110.5	1,658	293.4	4.6
Køge-Rønne (BornholmerFærgen)	Færgen	long bridge	98	181	60	6.1	429	77.6	10.9
FinnLink	Finnlines	shuttle motorway	120	222	125	99.4	1,548	343.7	27.8
Nordö-Link	Finnlines	shuttle motorway	141	261	240	218.8	3,602	940.1	62.6
Karlskrona-Gdynia	Stena Line	shuttle motorway	168	311	560	117.0	1,564	486.4	174.2
Gothenburg-Kiel	Stena Line	shuttle motorway	236	437	419	86.0	1,290	563.7	183.1
Stockholm-Riga	Tallink	shuttle motorway	266	493	677	13.5	475	234.2	333.8
Copenhagen-Oslo	DFDS Seaways	shuttle motorway	272	504	727	12	185	93.2	366.4

registrations in 2014 and 2015, the fleet was reduced by 5% both in terms of number of units and in gross tonnage (GT). Other factors also diminished – total passenger capacity by 1%, and the sum of lane metres by 4%. A comparison of the latest figure, lane performance (-4%) and the growth in cargo volumes (units +3%, tonnes +2%), shows that the cargo capacity of the Baltic fleet was better utilised in 2014.

The ‘consolidated’ fleet of the operators amounts at the moment to 171 vessels (summing up to GT 4.3 mln), giving a total of 313.6 thou. lane metres or – alternatively – nearly 1.1 mln of lane performance (km/km per week). The last figure is a little bit tricky, as lane performance might seem slightly difficult with its km-km unit – but not if we look at a ferry ship as a ‘travelling bridge’ of lane metres carried on a given distance, remarking also that it occurs multiple times within a specified period. One hundred km-km means that e.g. 1,000 lane metres travelled 100 km (or 2,000 lane metres were moved 50 km; although sea distances are measured in nautical miles we have decided to go with kilometres here for easier reference to lane metres and vessels’ freight capacity in general). Therefore, Tab. 3 displays the performance of various selected sea-bridges (short: travel time < 1 hr; long: 1-4 hrs) and shuttle

motorways (roundtrips of up to two days between two ports only), which range from the 5 km long Helsingborg-Helsingør, to the 504 km in length Copenhagen-Oslo. All of this points to one key feature of the Baltic market. While it’s ‘united’ by the common ro-ro & ferry denominator, it’s also fragmented by the types of services offered, the longitude of particular routes (not to mention their east-west or north-south dimensions), vessels with different pax/cargo capacities, lane performance, as well as other detailed features.

Coming back to the fleet, there is another important factor which is crucial for the Baltic ro-ro & ferry business. Even if operators have enough tonnage at the moment, the existing fleet is ageing, becoming outdated especially due to recent environmental regulations (EU Sulphur Directive enforcement). It seems that during the period 2014-2016 the average age of the





Photo: Sieria Line

Tab. 4. Top 10 Baltic ferry ports – passengers, thou. (2014)

	Year		2012	2013	2014	
1	Helsinki	FI	10,608	10,724	10,901	+1,7%
2	Tallinn	EE	8,394	8,709	9,081	+4,3%
3	Stockholm	SE	9,025	8,833	8,453	-4,3%
4	Helsingborg	SE	7,841	7,763	7,656	-1,4%
5	Helsingør	DK	7,824	7,721	7,635	-1,1%
6	Puttgarden	DE	6,001	5,945	6,002	+1,0%
7	Rødby	DK	6,001	5,945	6,002	+1,0%
8	Turku	FI	3,312	3,425	3,257	-4,9%
9	Mariehamn	FI	3,310	3,040	3,024	-0,5%
10	Odden	DK	2,038	2,462	2,525	+2,6%
	Total		64,354	64,567	64,536	

Baltic ro-pax and ro-ro fleet will grow by two years at least. While not affecting cargo, passengers noticing that could feel more and more uncomfortable. A question arises

about the direction of the upcoming investment boom – will the operators (and their banks) buy new tonnage or will they favour huge conversions? ■





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Port of Algeciras

Located near the Strait of Gibraltar, the Port of Algeciras has grown over the years to become the largest port in Spain and the 5th biggest in the European Union (both in terms of total cargo and container turnover). Algeciras is also an EU TEN-T core port lying on the Atlantic and Mediterranean freight corridors, serving as a nodal point for the Asia-Europe-Americas and Africa-Europe trade lanes.

In 2013, Algeciras again broke its record by handling over 90 mln tn of freight (+2.2% year-on-year) as well as 4.34 mln TEU (+5.6% year-on-year). In addition as many as 5.1 mln passengers went through the port's berths. In total, around 30,000 vessels call at Algeciras each year.

Although presently its port infrastructure spans across an impressive 17 km of quays, covering 600 ha, Algeciras continuously strives to develop. Currently, there are three main ongoing extension projects taking place within the harbour – setting up of the Algeciras Logistic Area together with developing the sites of the Isla Verde Exterior and Campamento.



Around 30,000 vessels yearly call Algeciras, the largest port in Spain and the 5th biggest in the EU.

KEY PARAMETERS

Total port area	745 ha
Land area	306 ha
Water depth	2 to 32.5 m
No. of quays	40
Total quay length	17 km

STATISTICS (2014-2013)

	2014	2013	YOY 2014/2013
TOTAL	88.08 mln tn	85.87 mln tn	+2.6%
Dry bulk	1.6 mln tn	1.6 mln tn	0%
Liquids	25.32 mln tn	24.18 mln tn	+4.7%
General cargo	61.16 mln tn	60.09 mln tn	+1.8%
incl. Containers	4.55 mln TEU	4.35 mln TEU	+4.6%
incl. Ro-ro	6.3 mln tn	5.75 mln tn	+9.6%
Pax	5.36 mln	5.17 mln	+3.7%
Ship calls	26.75 thou.	25.45 thou.	+5.1%



Photos: Port of Algeciras



Port of Constantza



The Romanian sea- and river Port of Constantza, covering an area of 3,926 ha, is located 179 NM (332 km) from the Bosphorus Strait and 85 NM (157 km) from Danube river estuary.

There are 156 berths (of which 140 are operational) in the port, enabling it to handle up to 100 mln tn per year. The total quay length amounts to 29.8 km, while the water depth in port areas ranges from 8 to 19 m, allowing 165,000 dwt tankers and 220,000 dwt dry bulk carriers to call at Constantza.

The Black Sea TEN-T core Port of Constantza is linked to pan-European transport corridors: Corridor IV (rail & road), Corridor VII (inland waterways) and to Corridor IX (road).

Currently, several projects (new cargo handling facilities as well as improved hinter-land connections) are in progress, mostly carried out in the southern part of the port.

KEY PARAMETERS

Total port area	3.9 ha
Land area	1.3 ha
Water depth	8-19 m
Total quay length	30 km
No. of berths:	156 (140 operational)

Constantza is located at the crossroads of the trade routes linking the markets of the landlocked European countries to Transcaucasus, Central Asia and the Far East.

STATISTICS (2014-2013)

	2014	2013	YOY 2014/2013	
TOTAL	55.64 mln tn	55.14 mln tn	+0.9%	
Dry bulk	32.67 mln tn	34.92 mln tn	-6.4%	
Liquids	12.52 mln tn	10.04 mln tn	+24.7%	
General cargo	10.45 mln tn	10.18 mln tn	+2.7%	
incl.	Containers	668,293 TEU	661,124 TEU	+1.1%
	Ro-ro	n/a	234.7 thou. tn	-1.4%
Pax	n/a	54,610	–	
Ship calls	n/a	14,000	–	



Photos: Port of Constantza



Port of Genoa

The universal Port of Genoa, located in the Italian part of the Ligurian Sea, functions both as a southern European gateway to the Mediterranean Sea, North Africa and to the Far East as well as a focal point of the EU Rhine-Alpine Core Network Corridor.

Handling approx. 50 mln tn of freight and almost 2 mln TEU per year, the Port of Genoa is Italy's 1st and 2nd biggest port regarding total handlings and container traffic, respectively. The port spans over a 22 km coastline, encompassing around 700 ha of land. There are 25 specialized terminals in Genoa suitably equipped to handle all types of cargo as well as to serve passenger traffic. There are over 150 regular liner services linking the port with the rest of the world.



KEY PARAMETERS

Total port area	700 ha
Land area	200 ha
Water depth	8 to 15 m
Total quay length	30 km

The Port of Genoa ranks 1st in terms of Italian ports' total freight throughput and 2nd in terms of containers handled.

STATISTICS (2014-2013)

	2014	2013	YOY 2014/2013	
TOTAL	51.94 mln tn	49.54 mln tn	+4.8%	
Dry bulk	3.78 mln tn	4.01 mln tn	-5.7%	
Liquids	17.92 mln tn	17.93 mln tn	-0.01%	
General cargo	30.24 mln tn	27.65 mln tn	+9.4%	
incl.	Containers	2.17 mln TEU	1.99 mln tn	+9%
	Ro-ro	8.59 mln tn	8.27 mln tn	+3.9%
Pax	2.74 mln tn	2.9 mln tn	-5.5%	
Ship calls	12 thou.	12.14 thou.	-1.2%	





Port of Oostende

The Port of Oostende is situated in Europe's busiest maritime area, in West Flanders in Belgium. Founded in 1584, it was a factor in the transformation of the town from a sleepy village into a home for Dutch, and later Belgian, international trade. Oostende has been mostly known as a ferry port with two companies providing connections to the UK.

The kinds of cargo handled at the harbour include: ro-ro, containers as well as dry bulk and break-bulk with focus placed on industrial equipment such as wind turbines. The town is also a stop for many cruise vessels berthing at the passenger terminal and cruise quay. The port offers 16 departures per day to the UK's Ramsgate, Thames area, Ipswich and Killingholme. The proximity of rail and the E40 motorway enables easy access to other Belgian cities as well as France and Spain. Additionally, Oostende is connected to the European inland waterways, via the canal Oostende-Bruges-Ghent.

KEY PARAMETERS

Total port area	658 ha
Land area	457 ha
Of which rentable sites	200 ha
Water depth	8 m (LOA) with a tidal range of 5 m
Total quay length	8.2 km
No. of berths:	n/a

Having its origins in the 16th century, the Belgian Port of Oostende has become the main engine for the city's and the region's industrial expansion over the centuries.

STATISTICS (2013)

		2013
TOTAL		1.82 mln tn
Dry bulk		1.25 mln tn
Liquids		55.8 thou. tn
Break-bulk		73.8 thou. tn
incl.	Containers	–
	Ro-ro	17,183 cargo units
Pax		27,709
Ship calls		4,358



Photo: Port of Oostende



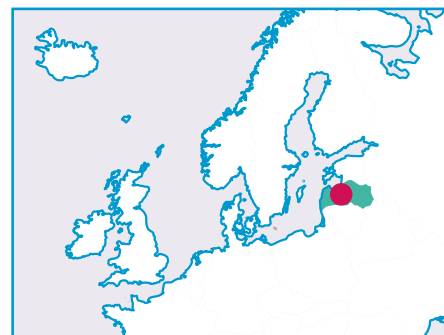
Photo: Pieter Cliteur.

Port of Riga

The Port of Riga is an important hub of freight transportation corridor that links goods' production and consumption markets in the EU and the CIS countries. The Port of Riga is strategically connected to the TEN-T road and rail network, as well as to the European Motorways of the Sea, providing efficient use of different modes of freight within the transport chain as well as cost optimization. The shorter distance advantages of Riga compared to the neighbouring ports ensure the best conditions for development of economic relations. Latvia's border with Russia and Belarus is a major factor for development of sustainable and mutually beneficial business relations.

The Freeport of Riga is a multifunctional port; it is ready to handle all types of cargo from various regions. In 2013 cargo turnover at the port reached 35.5 million tons.

The Freeport of Riga offers year-round navigation.



By throughput of cargo Riga is the largest Latvian and the Baltic States' port, handling approx. 1/5 of the region's total turnover.

KEY PARAMETERS

Total port area	6,348 ha
Land area	1,962 ha
Of which rentable sites	445 ha
Water depth	16.0 m
Total berth length	18.2 km
No. of berths	114

STATISTICS (2014-2013)

		2014	2013	YOY 2014/2013
TOTAL		41.08 mln tn	35.47 mln tn	+15.8%
Dry bulk		23.72 mln tn	21.57 mln tn	10%
Liquids		10.28 mln tn	7.11 mln tn	+44.6%
General cargo		7.07 mln tn	6.78 mln tn	+4.3%
incl.	Containers	387,603 TEU	381,099 TEU	+1.7%
	Ro-ro	92,315 cargo units	111,068 cargo units	-16.9%
Pax		737,865	837,665	-11.9%
Ship calls		3,797	3,850	-1.4%



Photos: Port of Riga



Port of Rotterdam



The Port of Rotterdam has been functioning as a gateway to the European market for over 350 million consumers for years. With an annual throughput of 450 mln tn of cargo it is Europe's largest seaport and one of the largest logistic and industrial hubs worldwide. The port ranges over 40 km and covers about 12,500 ha (incl. the newly built Maasvlakte 2).

Rotterdam gained its leading position due to its location, the hinterland connections as well as companies and organisations operating within port area and its industrial complex.

The port has been growing gradually for a few decades. To keep its top position and be able to meet future demand, in 2008, it started the construction of Maasvlakte 2. Extension encompasses an area of approx. 1,000 ha of industrial sites. This will become the new home for many port operations and related industries.

KEY PARAMETERS

Total port area	12,603 ha
Land area	7,791 ha
Of which rentable sites	5,972 ha
Water depth	24 m
Total quay length	70.5 km
No. of quays	n/a

The Port of Rotterdam has been functioning as a gateway to the European market for over 350 million consumers for years.

STATISTICS (2014-2013)

	2014	2013	YOY 2014/2013
TOTAL	444.73 mln tn	440.46 mln tn	1%
Dry bulk	88.60 mln tn	89.19 mln tn	-0.7%
Liquids	202.50 mln tn	206.80 mln tn	-2.1%
General cargo	156.63 mln tn	144.47 mln tn	+8.4%
incl.	Containers	12.3 mln TEU	+5.8%
	Ro-ro	20.01 mln tn	+8.1%
Pax	n/a	n/a	–
Ship calls	n/a	29,448	–



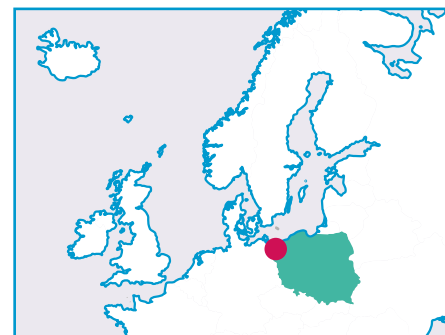
Photos: Port of Rotterdam



Port of Szczecin-Świnoujście

The universal Szczecin and Świnoujście seaports, located in north-west Poland at the mouth of the Oder River, are some of the largest harbour facilities in the Baltic Sea region. Świnoujście offers dense direct traffic to/from Sweden thanks to Poland's biggest ferry terminal; the port also specializes in turnover of various bulk goods, incl. iron, coal and agrobulk. Szczecin chiefly handles general cargo like containers (with regular southbound rail services), steel and forestry products, heavy lifts, but also takes care of dry (incl. coal, coke, grains and feedstuff) as well as liquid bulk cargo. Moreover, Szczecin-Świnoujście seaports are connected to inland waterways, enabling barge shipments (e.g. to the Berlin and Brandenburg regions). In 2013, Szczecin-Świnoujście seaport handled altogether nearly 23 mln tn.

The harbours are managed by the joint stock company Szczecin and Świnoujście Seaports Authority, where the Polish State Treasury holds the majority stake. The land-lord Authority is responsible for managing the ports' property and infrastructure, ensuring fairway navigability, masterminding and implementing development strategies (incl. obtaining land and real estates) as well as for all services related to the use of port infrastructure like wastewater disposal.



KEY PARAMETERS

Total port area	3,059 ha
Land area	1,431 ha
Of which rentable sites	160 ha
Water depth	Szczecin: 9.15 m; Świnoujście: 13.2 m
Total quay length	12,842.5 m
No. of quays	66

The universal Szczecin and Świnoujście seaports, located in north-west Poland at the mouth of the Oder River, are some of the largest harbour facilities in the BSR.

STATISTICS (2014-2013)

		2014	2013	YOY 2014/2013
TOTAL		23.4 mln tn	22.75 mln tn	+2.9%
Dry bulk		10.72 mln tn	11 mln tn	-2.5%
Liquids		2.33 mln tn	2.36 mln tn	-3%
General cargo		10.34 mln tn	9.39 mln tn	+28%
incl.	Containers	78,440 TEU	62,310 TEU	+25.9%
	Ro-ro¹	7.37 mln tn	6.62 mln tn	+11.3%
Pax		903.71 thou. ²	796.31 thou. ³	–
Ship calls		7,461	9,014	-17.2%

¹ incl. trucks' tare; ² incl. truck drivers; ³ excl. truck drivers





Port of Thessaloniki

The Greek Port of Thessaloniki is situated in the northern section of the eastern Mediterranean Sea, inside the Bay of Thermaikos and west from the city centre. Founded 23 centuries ago, it still fulfills the role of the most important harbour for the Macedonia region and one of the most important in south-east Europe, serving approx. 15 mln consumer area.

The port offers six piers with 27 quays (totalling 6.2 km), able to manage all types of cargo (incl. 150 ha of fuel storage space) as well as passenger traffic. A natural channel of substantial depth enables every ship to berth at Thessaloniki.

Thessaloniki is a TEN-T core port, a part of the Orient-East Med Corridor, located also at the crossroad of the east-to-west Egnatia Motorway and north-to-south PAThE Motorway (Patras-Athens-Thessaloniki-Evzoni) land transportation networks.

KEY PARAMETERS

Total port area	150 ha
Water depth	12 m
Total quay length	6.2 km
No. of quays	27

Founded 23 centuries ago, the TEN-T core port Thessaloniki is the largest transit-trade port in Greece and one of the largest harbours in the Aegean Sea basin.

STATISTICS (2014-2013)

		2014	2013	YOY 2014/2013
TOTAL		14.41 mln tn	12.98 mln tn	+11%
Dry bulk		4.34 mln tn	3.81 mln tn	+14%
Liquids		5.84 mln tn	5.26 mln tn	+11%
General cargo		4.23 mln tn	3.91 mln tn	+8.1%
incl.	Containers	349.513 TEU	322.310 TEU	+8%
	Ro-ro	48 thou. tn	44 thou. tn	+9%
Pax		24.96 thou.	33.24 thou.	-25%
Ship calls		2,097	1,819	+15%



Photos: Wikimedia Commons

partnership events



TransRussia 2015
21-24 April 2015
RU/Moscow

The 20th anniversary of TransRussia will once more attract professionals from Russia, the Baltic and CIS States as well as anybody interested in transport & logistics across these countries. At the event the most important issues in the development of the Russian transport system are discussed every year. The exhibition part will demonstrate a full range of industry solutions – from transport and forwarding services to software and equipment solutions easing cargo handlings.



Subsea Vessels Conference
29-30 April 2015
NO/Oslo

The event is dedicated to the global subsea vessel sector with the chief aim of improving the interface between oil and gas companies, subsea vessel operators, and subsea hardware suppliers. The Subsea Vessels Conference is a must attend place for anyone involved in offshore construction, construction support, IMR and SURF operations, giving the possibility to receive feedback and insights from such majors as Technip, DOF Subsea, Bibby Offshore Construction, Reach Subsea and SIEM Offshore.



Transport Logistic
5-8 May 2015
DE/Munich

The Transport Logistic trade fair has established itself as a 100% transport & logistics showcase, presenting in one place the entire value chain as well as major international market players. The previous 2013 edition of Transport Logistic attracted a record number of over 2,000 exhibitors from 63 countries and more than 52,000 trade visitors from 110 countries.



Multimodal 2015: Bridge between Europe and Asia
13-15 May 2015
TR/Istanbul

The 2015's edition of the Multimodal conference will focus on the following affairs – the development of Europe-Asia transport freight corridors (incl. opportunities for transit countries), multimodal transportation in Europe and in the Caspian region (incl. optimization measures and risk analyses), Turkey as a multimodal traffic centre, bulk cargo containerization, as well as using inland waterways (Danube, Rhine, Dnieper) in mixed logistics.



Breakbulk Europe 2015
18-21 May 2015
BE/Antwerp

Breakbulk Europe is the largest exhibition & educational forum in the world addressing the needs of traditional breakbulk and project cargo logistics professionals. Visit the Breakbulk Europe Exhibition to network with 300+ exhibitors and sponsors, ranging from ocean carriers, freight forwarders and ports & terminals representatives, to logistics providers, export packers and equipment manufacturers.



Big Data & Performance Management in Shipping 2015
21 May 2015
UK/London

The conference will investigate the industry's experiences of utilising big data that the shipping industry has at hand (incl. on-board systems, satellite, AIS, weather information, and much more), this way presenting opportunities to further reduce operational expenditure.



ESPO Conference 2015
21-22 May 2015
GR/Piraeus

In May 2014, the European Commission released its energy security strategy, in which it developed a set of short- and long-term measures to ensure a stable and abundant supply of energy for European citizens and the economy. Knowing that around 40% of all commodities handled in European ports are sources of energy, and that European ports are important clusters of industry, it is clear that this change in policy will alter business in European ports. Are ports getting ready?



3rd Coaltrans Poland
26-27 May 2015
PL/Sopot

The third edition of Coaltrans Poland will be a comprehensive two-day event providing insight into key issues impacting the country's coal industry today and in the future, like the new import licence legislation under development, mines being closed down or restructured, the changing geopolitical situation in neighbouring Ukraine as well as Poland's seaports increasing their coal handling capacities.



Black Sea Freight Market & Ports
29 May 2015
UA/Odessa

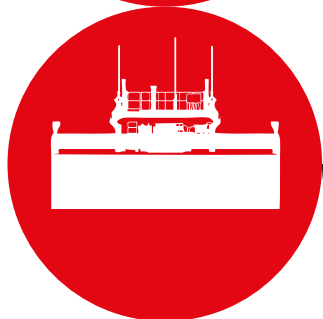
The annual Black Sea Freight Market & Ports forum specializes in seaborne trade in the Azov Sea and the Black Sea regions, incl. also special topics involving the Mediterranean. This year's edition will focus on the main dry and break-bulk freight flows, incl. grains & oilseeds, coal & steel raw materials export/import, as well as on fleet and freight rates (sea & river shipping) and main transshipment hubs in the Black Sea and Med. regions.

We invite you to cooperate with us! If you wish to comment on any key port issue, share your feedback or have information for us, do not hesitate to contact us at: editorial@baltic-press.com, +48 58 627 2320/ 2321.



Transport Week

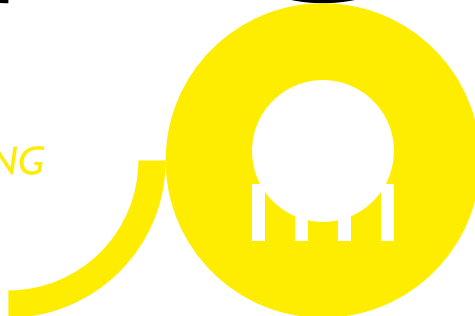
CONTAINERS



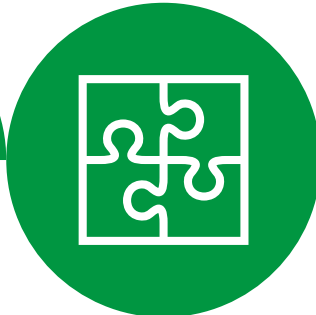
RAIL



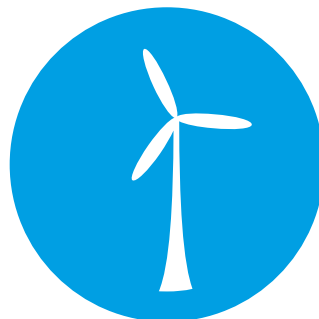
LNG



LOGISTICS



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