



SHORTSEA PROMOTION CENTRE - SPAIN



Chances and challenges from innovations and environmental issues from the point of view of Spanish ship operators

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Lübeck, 21 June 2018

Manuel Carlier

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- Member of the Plenary, European Sustainable Shipping Forum
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POLITÉCNICA

Shortsea Promotion Center - Spain

www.shortsea.es



- **Established in 2002.**
 - 50% of budget covered by the Spanish Government through the public body of State Ports: “Puertos del Estado”.
 - No direct participation of Port Authorities.
- **Restructured in 2009.**
 - Public State ports becomes an ordinary single member.
 - Port Authorities allowed to participate directly.

SPC-Spain today: 28 members



- **PORTS:** State Ports Public Body + 11 Port Authorities
- **SHIPPING COMPANIES:** 3 Spanish, 6 Foreign + National Association (ANAVE)
- **NATIONAL ASSOCIATIONS** of Road Transport (CETM) and Freight Forwarders (FETEIA)
- **OTHER:** port operators, terminals, foundations,...



SPC Spain main services

Freely available in www.shortea.es



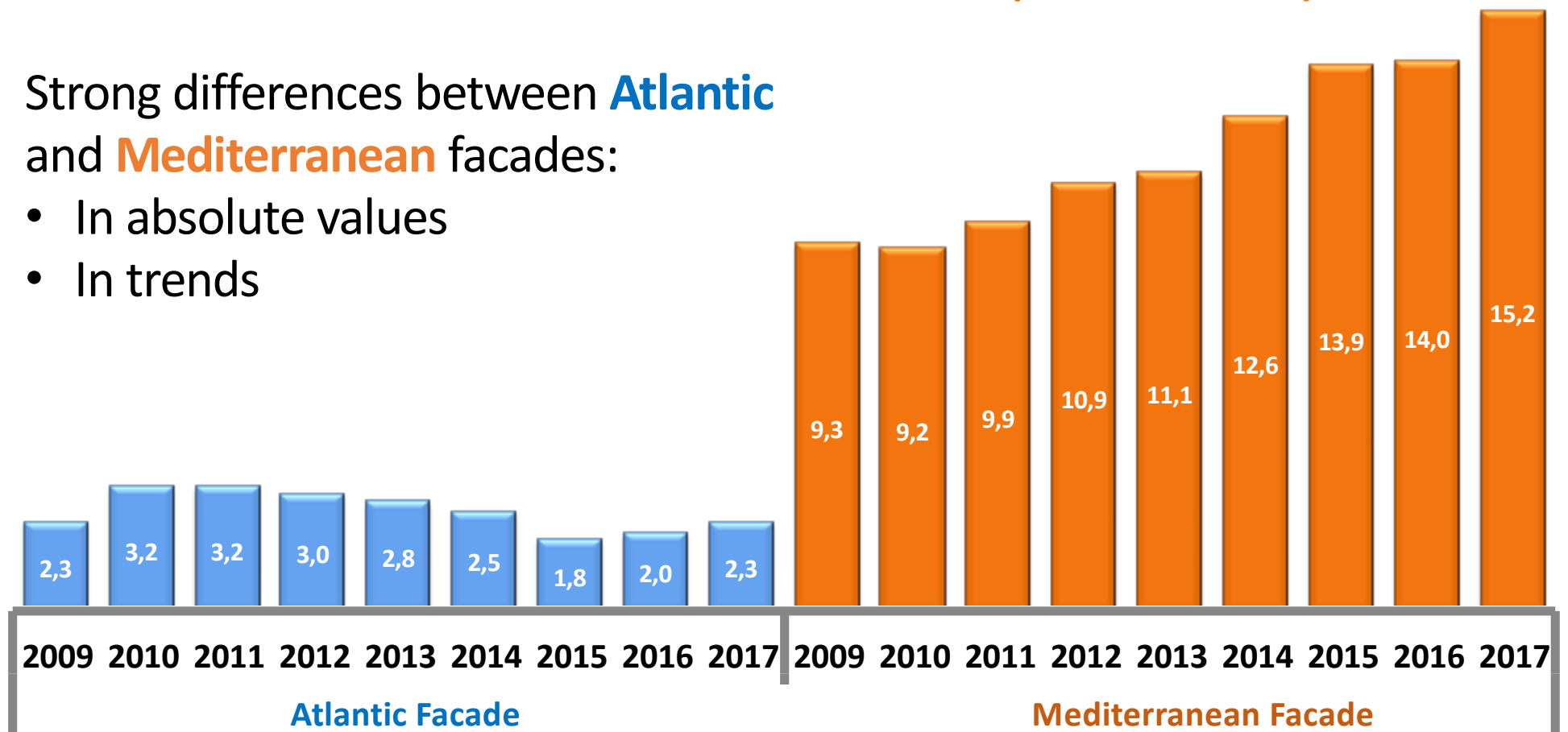
- **Observatory of SSS supply and demand in Spain.**
 - Biannual reports. Time series from 2009.
 - Last available report, second half 2017.
- **Multimodal transport chains Simulator.**
 - Comparison of SSS chains with pure road transport.
 - In terms of costs, transit time and CO₂ emissions.

Observatory of SSS supply and demand in Spain

SSS RO-RO CARGO DEMAND. 2009 – 2017 (Million tons)

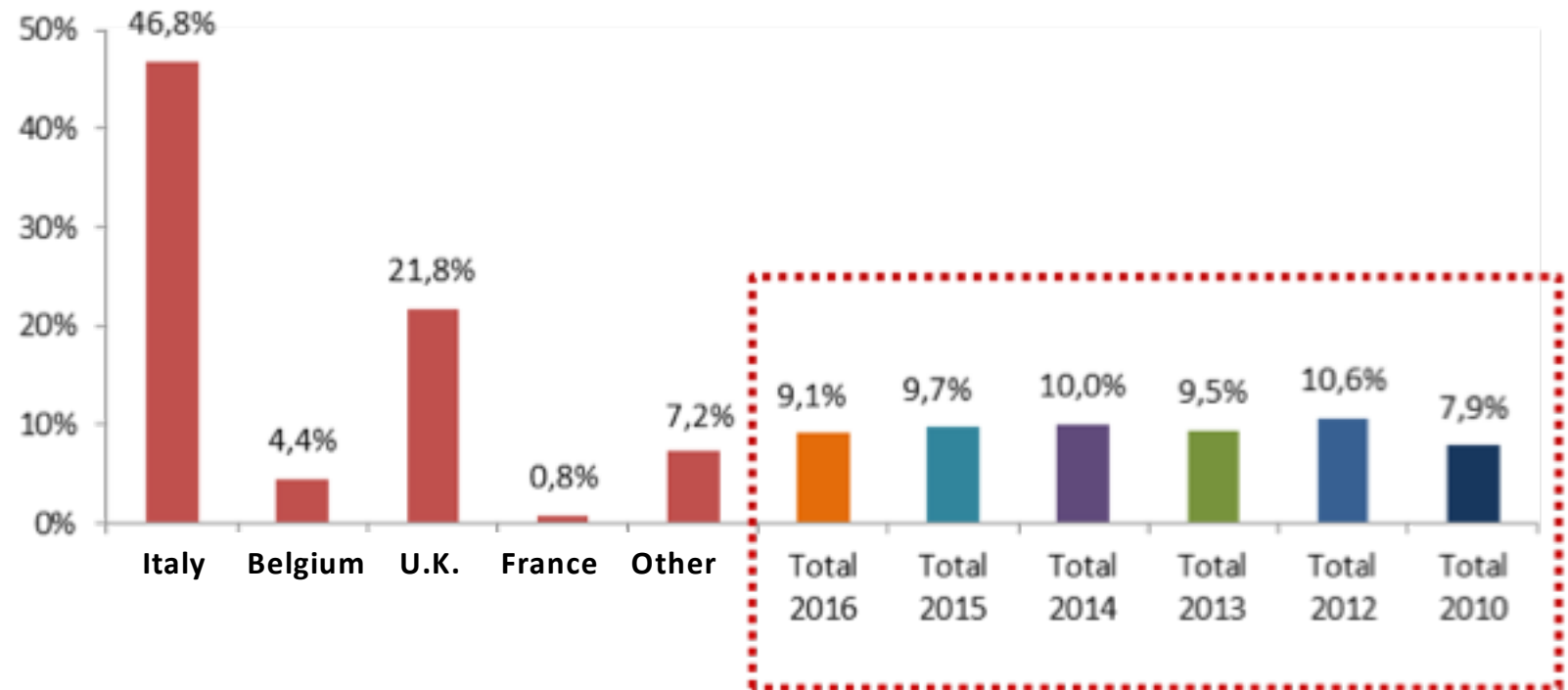
Strong differences between **Atlantic** and **Mediterranean** facades:

- In absolute values
- In trends



Observatory of SSS supply and demand in Spain

- Share of SSS in total trade (road + ro-ro). Containers and car carriers not included: High shares in trades with Italy and UK



SPC-Spain multimodal Transport Chains Simulator

Madrid - Lübeck
via Bilbao - Antwerp

	Road	SSS
Distance (km)	2,215	2,447 (11%)
Price (euro)	2,104	1,660 (-21%)
Transit time (hours)	70	78 (+10%)
CO ₂ emissions	4,904	2,596 (-47%)



SPC-Spain multimodal Transport Chains Simulator

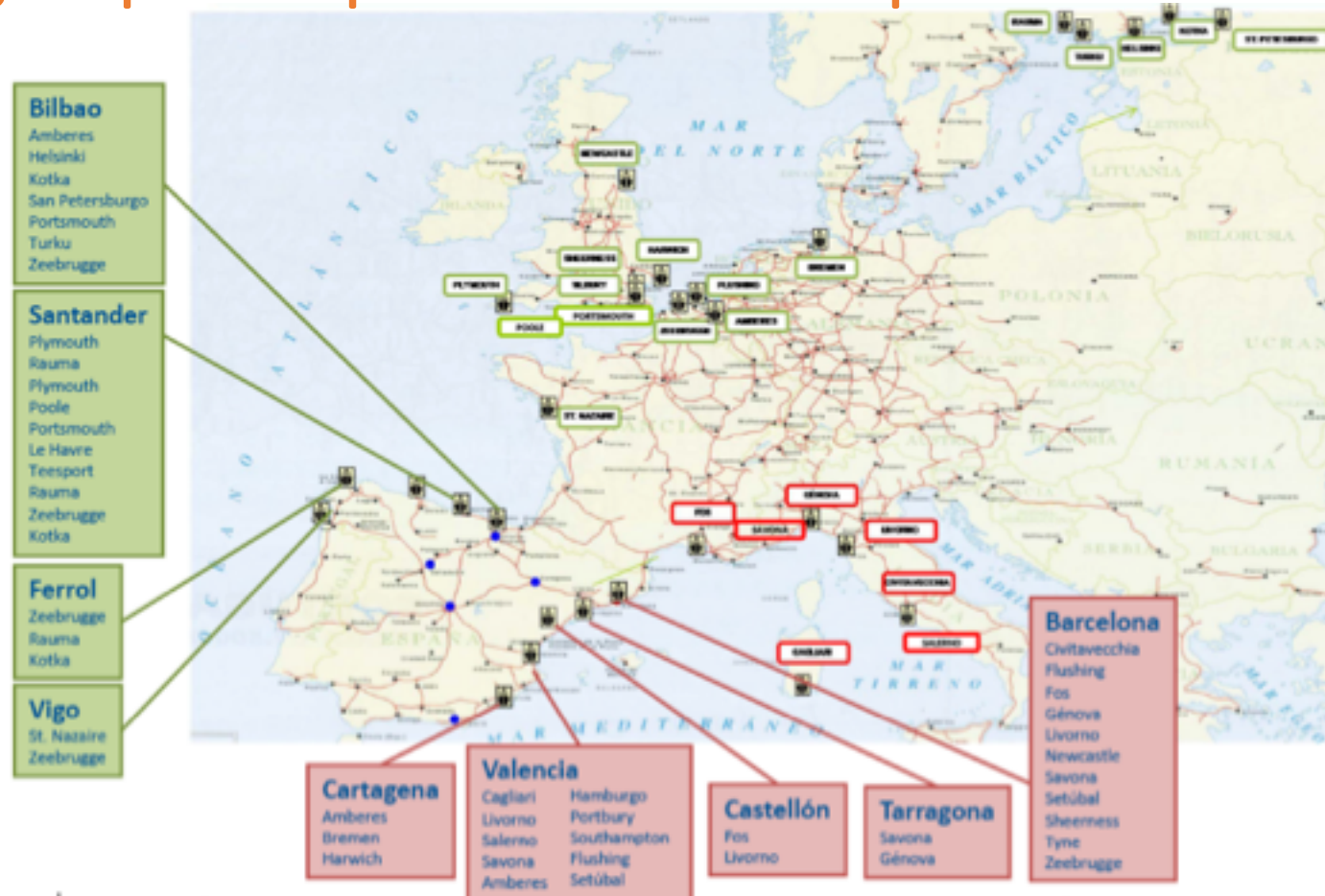
Madrid - Rome, via Barcelona - Civitavecchia

	Road	SSS
Distance (km)	1,952	1,516 (-22%)
Price (euro)	1,854	1,522 (-18%)
Transit time (hours)	65	33 (-50%)
CO ₂ emissions	4,321	1,761 (-59%)



SSS in Spain. Ro-ro services

Connecting 9 Spanish ports with 30 EU ports



EL TRANSPORTE MARÍTIMO DE CORTA DISTANCIA Y SU APORTACIÓN A LA COMPETITIVIDAD DEL SECTOR DEL TRANSPORTE DE MERCANCÍAS POR CARRETERA

SSS in Spain. Ro-ro services

Motorways of the Sea = 3 or more weekly calls



Source: Lineport. Valenciaport Foundation

ORIGIN / DESTINATION	COMPANY	SHIP	TRANSIT TIME	CALLS/ WEEK
BARCELONA-PORTO TORRES-CIVITAVECCHIA	GRIMALDI	RO-PAX	12/20h	6
BILBAO-PORTSMOUTH	BRITTANY FERRIES	RO-PAX	22,5h	3
SANTANDER – PORTSMOUTH	BRITTANY FERRIES	RO-PAX	24h	3
MOTRIL-TANGER MED	FRS IBERIA	RO-RO	7h	7
VALENCIA-BARCELONA-LIVORNO-SAVONA	GRIMALDI	RO-RO	36/51-20/35h	6
VALENCIA-CAGLIARI-SALERNO	GRIMALDI	RO-RO	22/41h	3
VIGO-ST. NAZAIRE	FLOTA SUARDIAZ	RO-RO	35h	4

Potential synergies in the West Med with north-African countries

- Quick industrial/economic growth of Morocco (+4.8%) and other north-African countries. Good opportunities for SSS.
- Possible synergies (triangles) with lines between Italy, France, Spain.
- Difficulties with customs regulations (“infected ships”).



Main regulatory challenges for SSS, short and medium term

- 0,5% sulphur outside ECAS: 2020
- Water Ballast Convention: Up to 2024
- CO₂ Emissions: Market Measures?

Main regulatory challenges for SSS, short and medium term

- 0,5% sulphur outside ECAS: 2020
- Water Ballast Convention: Up to 2024
- CO₂ Emissions: New Measures?

Opportunities?

- Enhanced SSS environmental performance
- Undisputed advantage vs road transport
- Future CO₂ Regulations on road transport?

What SSS really needs: special treatment in IMO and EU environmental regulations

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- A holistic approach to CO₂ regulation
 - Special “friendly” treatment for SSS trades & ships
 - EU Support to SSS demand: Ecobonus?

Recent EU initiatives disappointing for SSS

- Alternative fuels Directive 2014/94. Date for LNG: 2025
- Legal uncertainty for open loop scrubbers (Water F. Directive)
- MRV Regulation, “per voyage” reporting
- Revision of Port Reception Facilities Directive
- EU Single Window proposal should include customs

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What SSS may deliver, in addition to sustainable transport: R&D platform for testing new technologies

- LNG bunkering: disseminating best practice
- Batteries, hybrid propulsion
- Future alternative fuels: Biofuels, Ammonia, H₂
- Digitalisation
- Autonomous ships?

What SSS may deliver, in addition to sustainable transport: R&D platform for testing new technologies





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Thank you for your attention

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