

Driving forces for the Baltic Sea Region Maritime Transport – Need for a Common Approach?

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by

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Disposition

- Traffic growth in the Baltic Sea region
- Driving forces behind traffic growth
- Logistics/transport supply development
- Challenges
- Present institutions and areas for common action
- Candidate areas for a common (BSR) approach
- Conclusions

Traffic growth

- Goods volume transported on ships 97/98 500 Mton
- Forecast (1999/2000) indicates 1000 Mtons by 2015
- (Total throughput in ports: 700 Mton 97/98)
- Oil 160 Mton 2001. Possibly doubling in 5-10 years.
- Container from 3,5 M TEU 2000 to 8 M TEU 2012 (Ocean Shipping 1999)
- Passenger flows growing in SE parts of BSR. 50% in ten yrs.
- Cruising traffic expanding. Ships around 100000 GT

Driving forces

- Expanding the EU internal market into the BSR
- Economic reform in the eastern BSR
- Strong economic growth
- New patterns of business contacts, employment and tourism
- Global sourcing – new supply chains
- Global trade – driven by Far East economic reforms and falling transport cost
- Containerisation and “trailerisation”

Logistics and transport supply (1)

- Larger and more specialised ships
- Feeder ships from a few hundreds TEU to 1000+
- For oil and other bulk products tonnage develops to make efficient use of Baltic Sea max draught 15,4 m. From Panamax to ships of 150000 dwt
- Wider and longer ships; possibly more than 200000 dwt in the Baltic Sea (= VLCC >200000 dwt).
- Container ships in ocean traffic >300, more than 6000 TEU
- Trend in Sweden: Fewer calls and greater GT and goods volume per call.

Logistics and transport supply (2)

- Larger container ships require expansion of lifting and handling capacity
- Increasing requirements on quays, depth in port basins, need to create space for ships' manoeuvring
- Improved fairways for accessibility and safety – Göteborg a prominent Swedish example. Many ports in line.
- Ports must specialise to retain competitiveness
- Ports may have to move physically – Vuosaari, Helsinki – or expand in new direction -Copenhagen.
- Dry ports

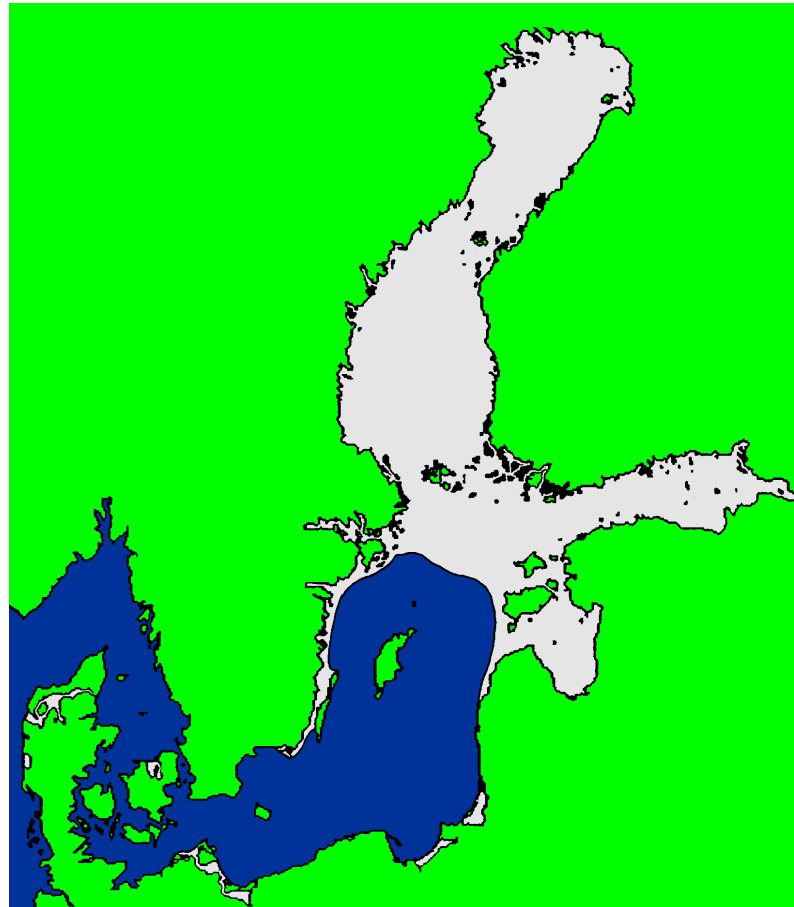
Challenges that require a common approach

- Optimal use of scale and scope advantages, financing, organisation
- Bottlenecks, capacity restrictions
- Co-ordinating hinterland connections nationally and internationally. Planning and priorities.
- Maritime safety – more conflicts, greater risks
- Environmental issues, climate, air, water, alien organisms, land use noise

Some institutions and areas of common action

- HELCOM – environmental and safety issues
- IMO –general maritime safety and environmental issues
- PSSA – regulatory framework
- EMSA – maritime safety and new legislation (EU)
- TEN and motorways of the sea –efficient transport
- EU directives (Erika packages) – maritime safety
- Short sea shipping – focal points; transport quality and efficiency
- BIM –Baltic Icebreaking Management
- BPO
- Council of the Baltic Sea States
- Interreg – EU co-financed regional research

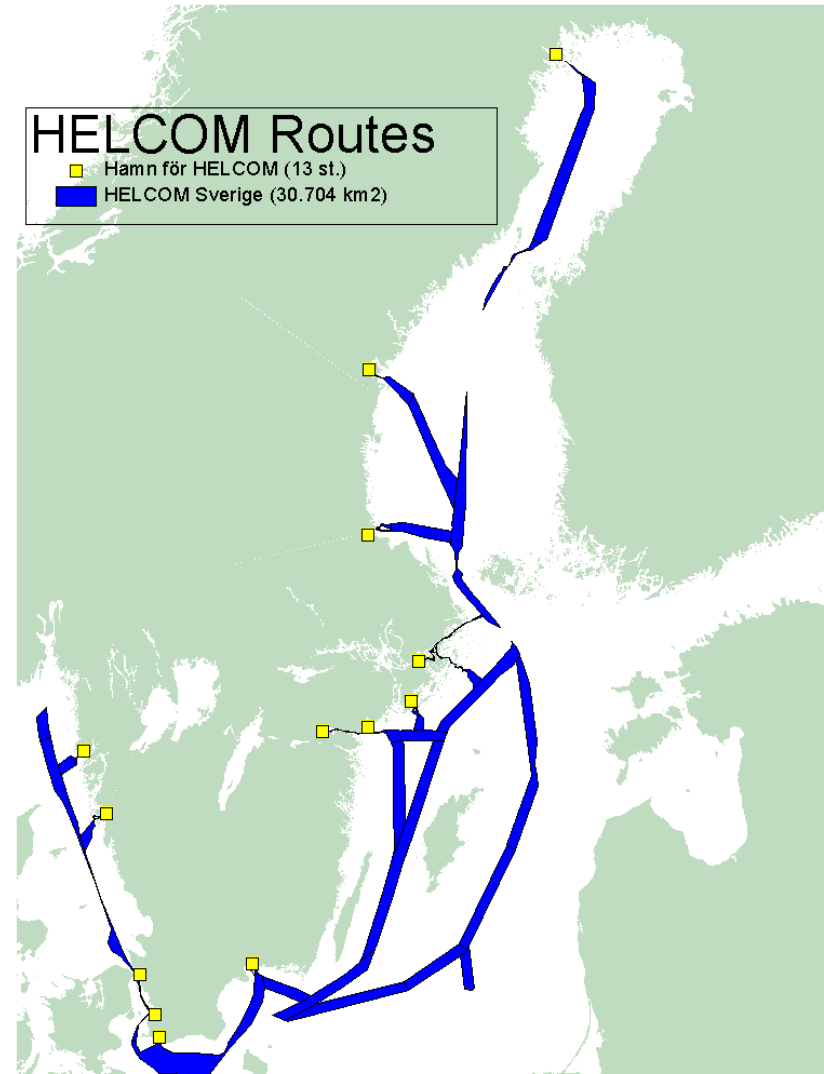
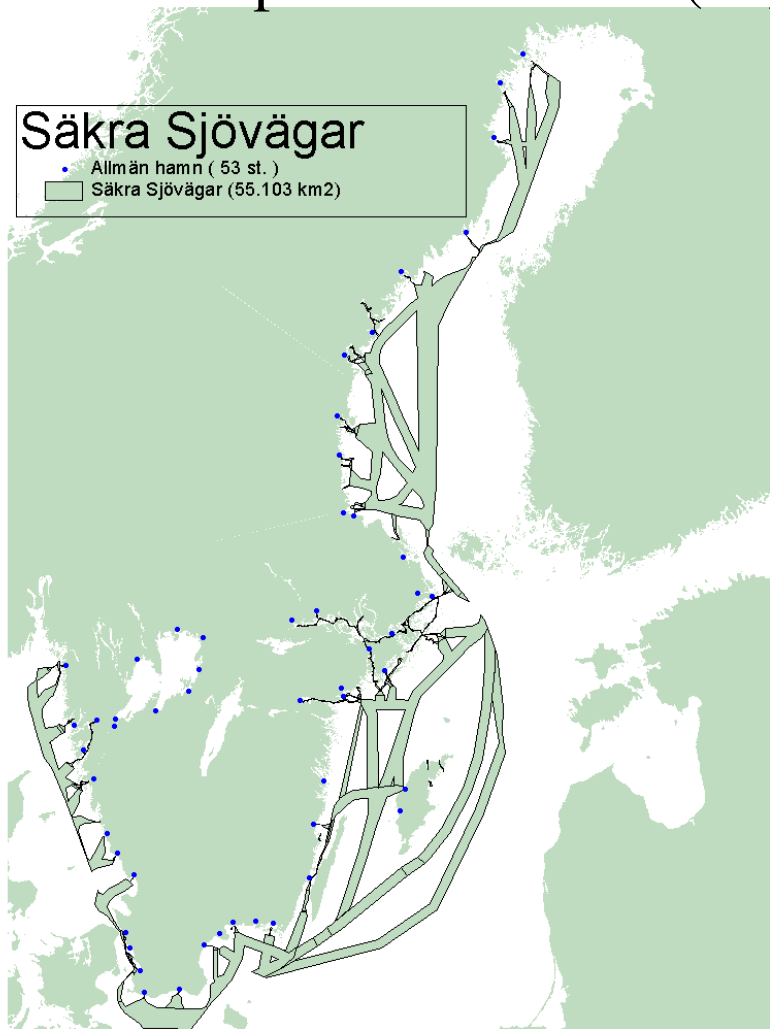
Ice cover in the Baltic Sea. Average winter 1961-1990



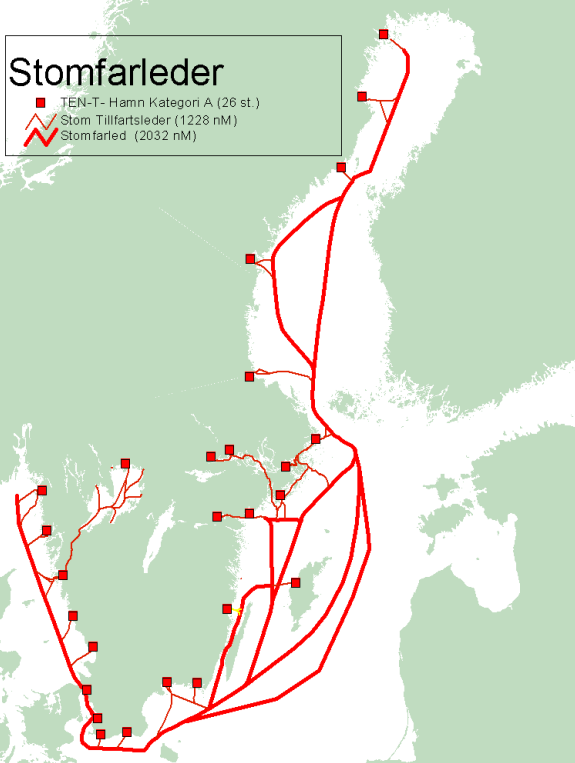
Helcom Maritime Routes



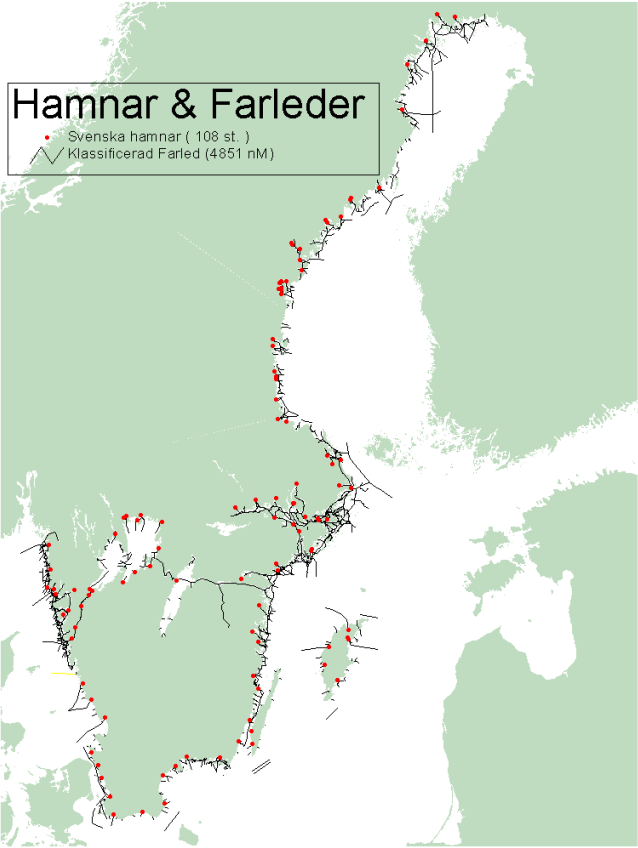
Helcom ports in Sweden (13)

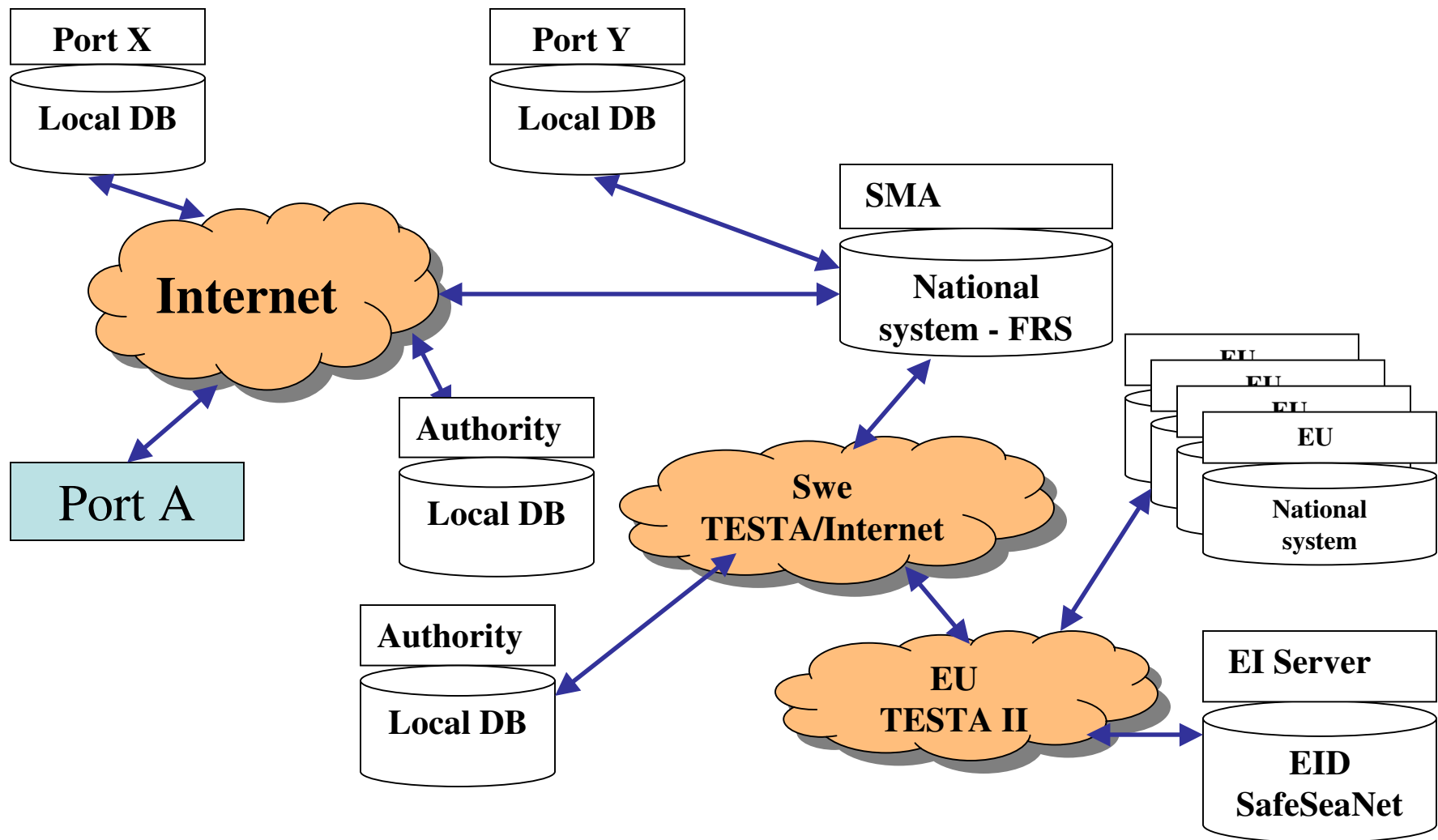


Swedish TEN-A ports (26)

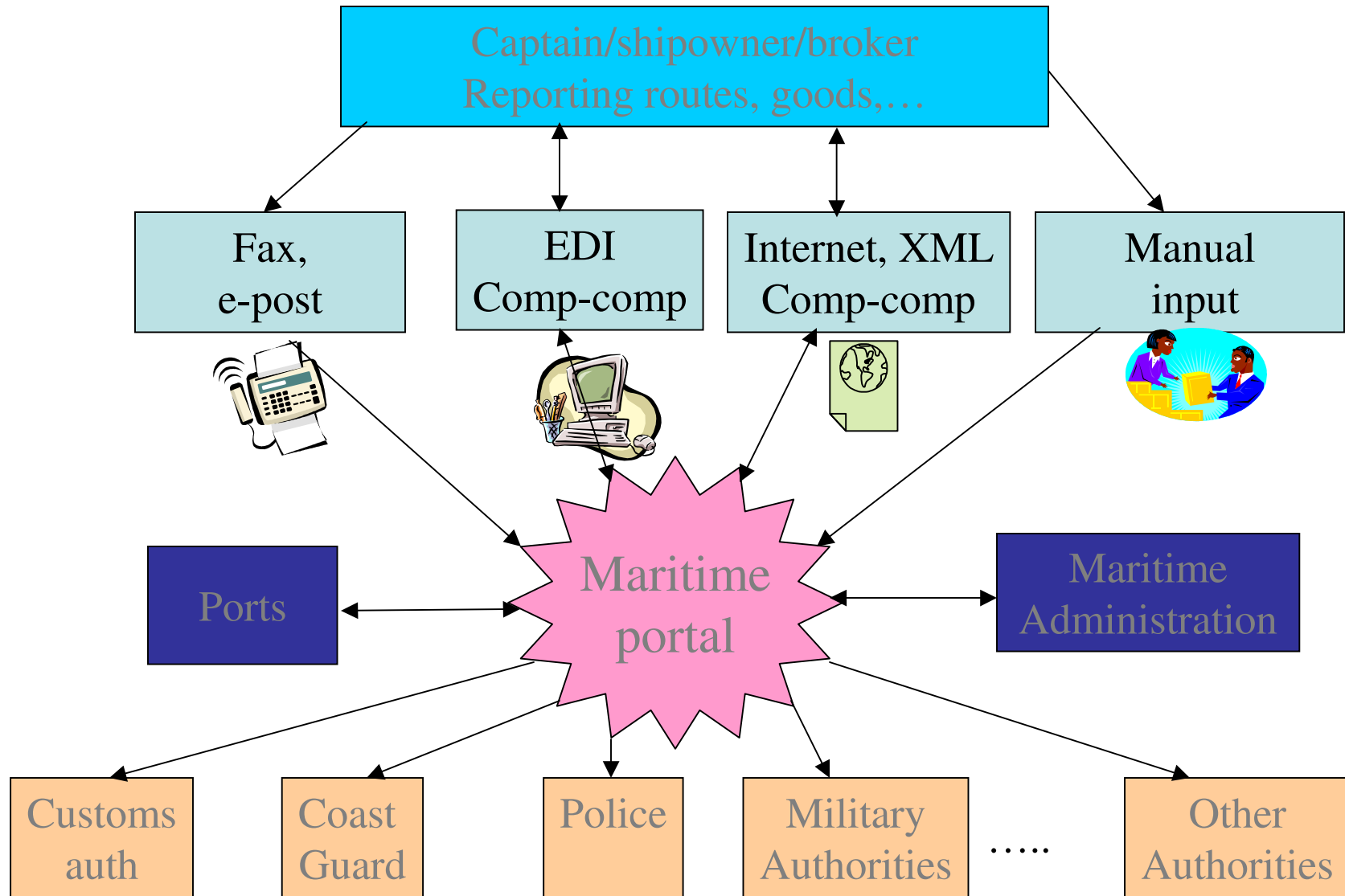


Swedish commercial ports (108)





A vision of easier reporting



Candidates for an enhanced common approach in the BSR

- Efficient infrastructure corridors and accessibility
- Principles of port development, organisation, financing and operation
- Information systems - on ships, cargoes, ports, units
- Economic instruments for maritime transport externalities – a level playing field
- Common statistics, transport forecasts, and transport demand models
- Logistics research and education

How to promote new common approaches?

- Use already existing institutions and co-operative processes as arenas to expand co-operation into new fields.
- Entirely new co-operative institutions?
- An expanded role for EMSA?
- Working through established multi lateral organisations e.g. IMO, EU?

Conclusions

- Growth of maritime transport will be strong
- New hitherto unknown challenges
- Despite considerable common efforts there is a need for more
- Expanded common approaches via regular multi lateral organisations -
and ad hoc use of established co-operative arenas
- New institutions only in exceptional cases