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DE ESPAÑA

MINISTERIO
DE FOMENTO

Puertos del Estado



Ports, Logistics and Economic Development

Barcelona, 25th April, 2016



The INTERNATIONAL
PROPELLER CLUBS

Session II: Ports and Infrastructures

The Spanish Ports System

Álvaro Rodríguez Dapena

Technical Director

Puertos del Estado



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SPANISH NATIONAL PORTS



NATIONAL SPANISH PORT'S SYSTEM

USER PAYS PRINCIPLE – SELF FINANCING SYSTEM FOR EACH PORT AUTHORITY

PRIVATISATION PROCESS - LAND LORD MODEL FOR ALL PORTS

MARKET RULES – COMPETITION

MINISTRY OF FOMENTO
(PUBLIC WORKS & TRANSPORT)



PUERTOS DEL ESTADO
(NATIONAL AGENCY OF PORTS)



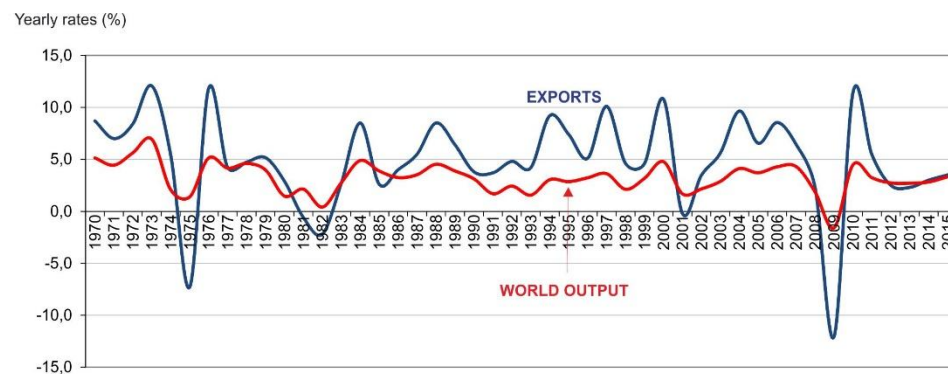
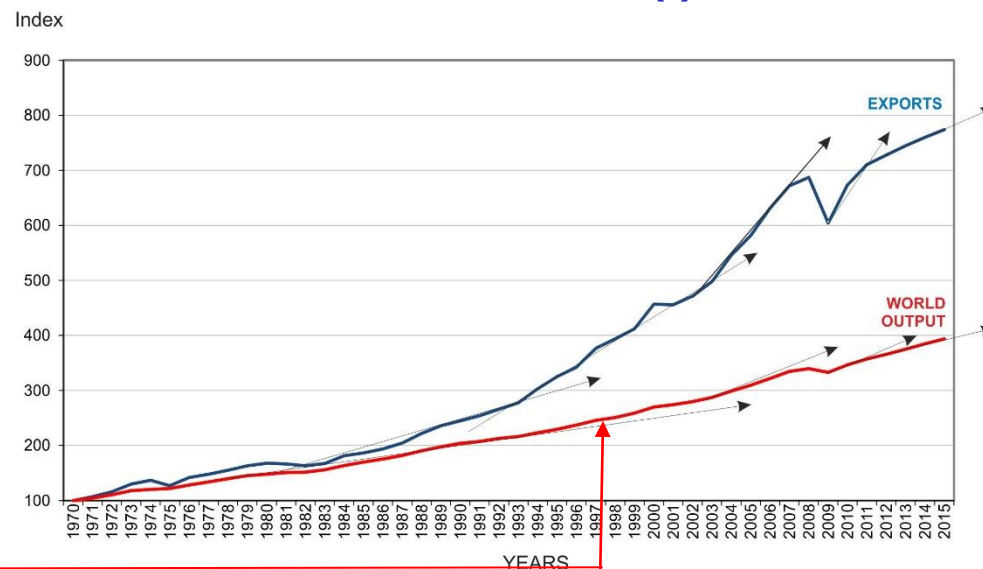
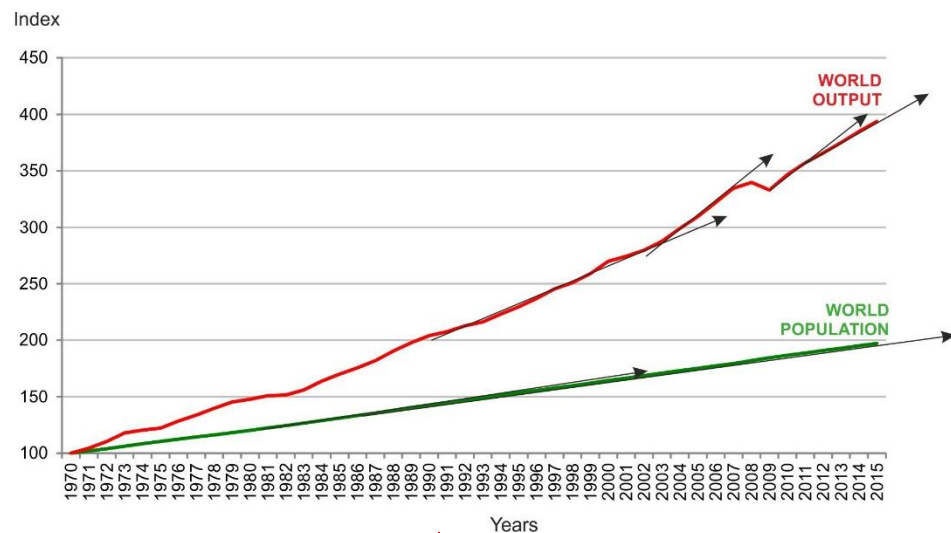
28 PORT AUTHORITIES
MANAGING 46 PORTS CALLED AS
“GENERAL INTEREST”



COMUNIDADES AUTÓNOMAS
(SPANISH REGIONS)
President and Board of Directors



POPULATION, ECONOMY AND TRADE IN THE WORLD (I)



Source: World Bank, WMF, OECD, UNCTAD 2015

World Output (Real GDP at market prices); Exports in tons



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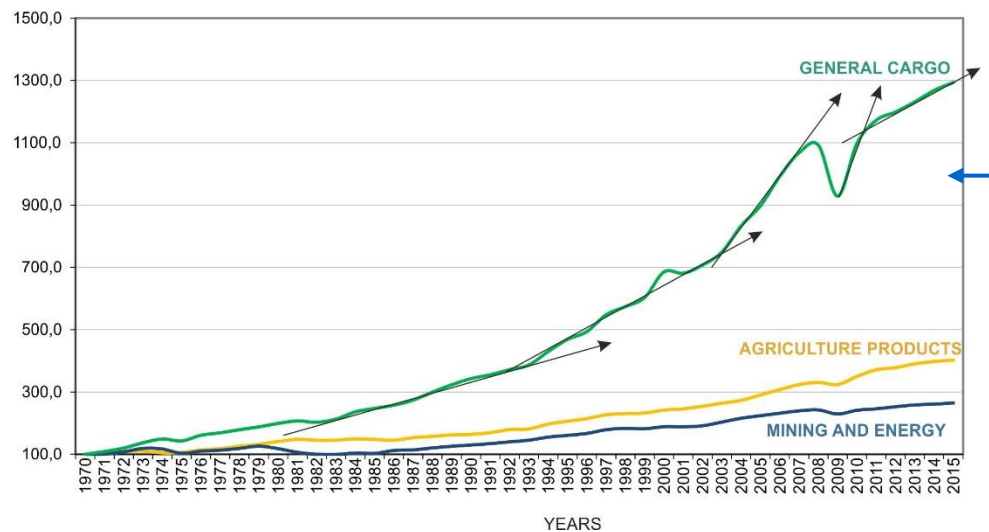
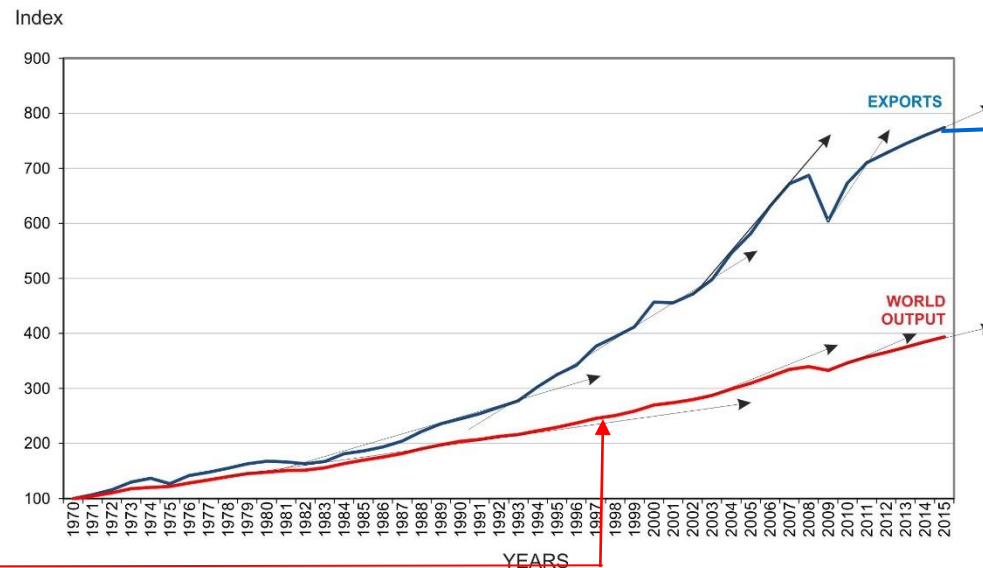
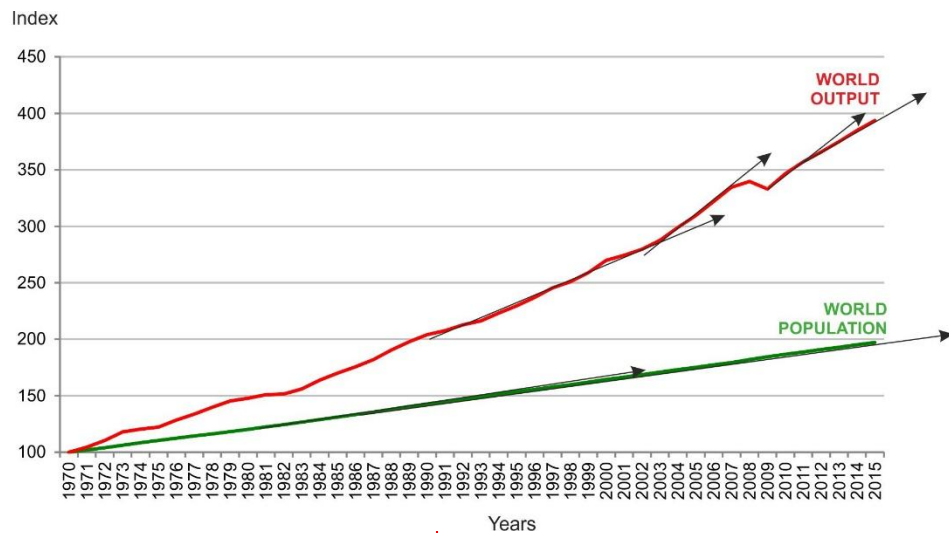
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POPULATION, ECONOMY AND TRADE IN THE WORLD (II)



Source: World Bank, WMF, OECD, UNCTAD 2015

World Output (Real GDP at market prices); Exports in tons



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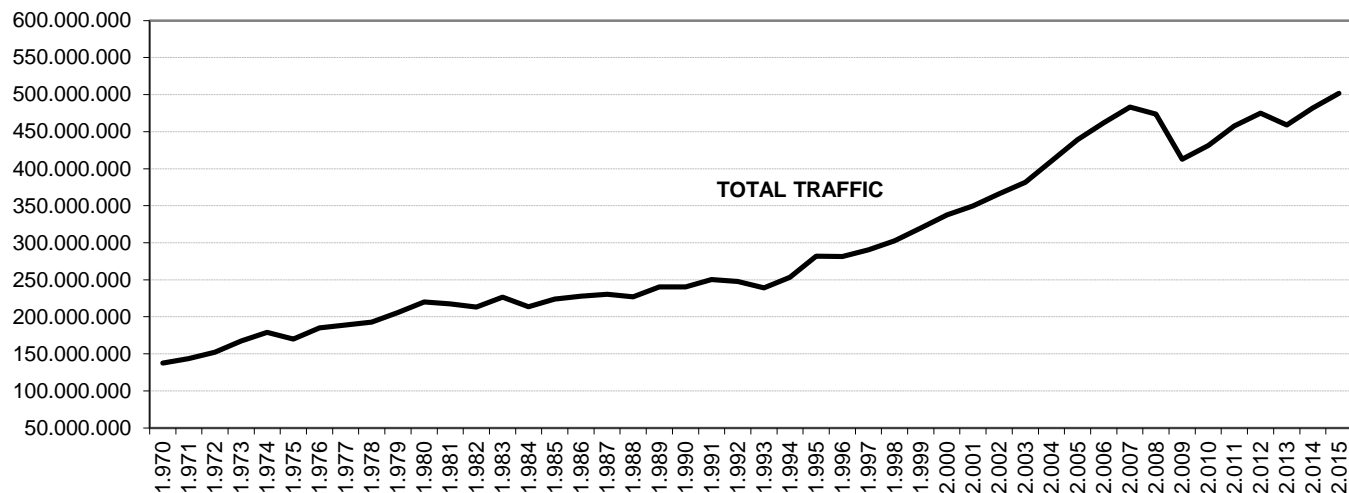


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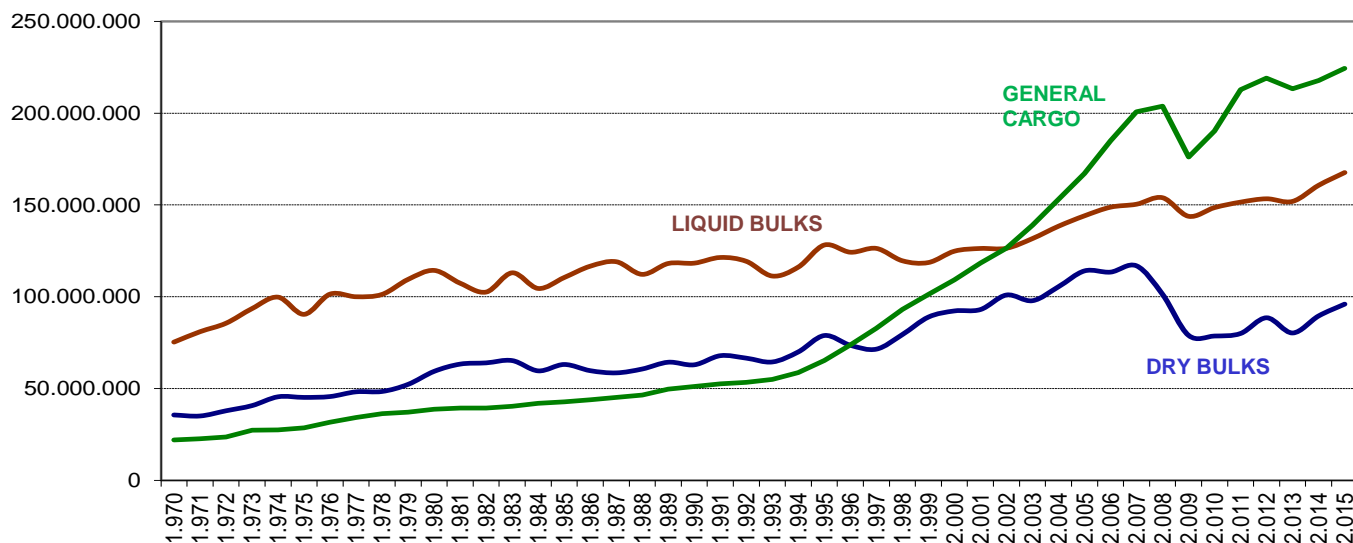
SPANISH PORT'S TRAFFIC EVOLUTION SINCE 1970



TONS per YEAR



TONS per YEAR





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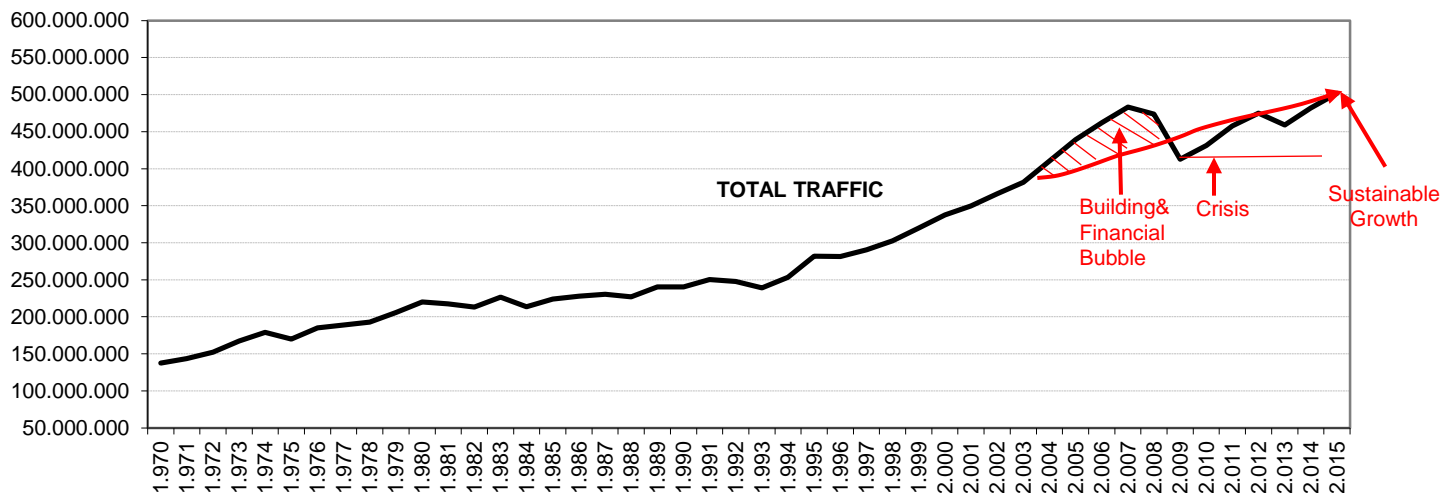


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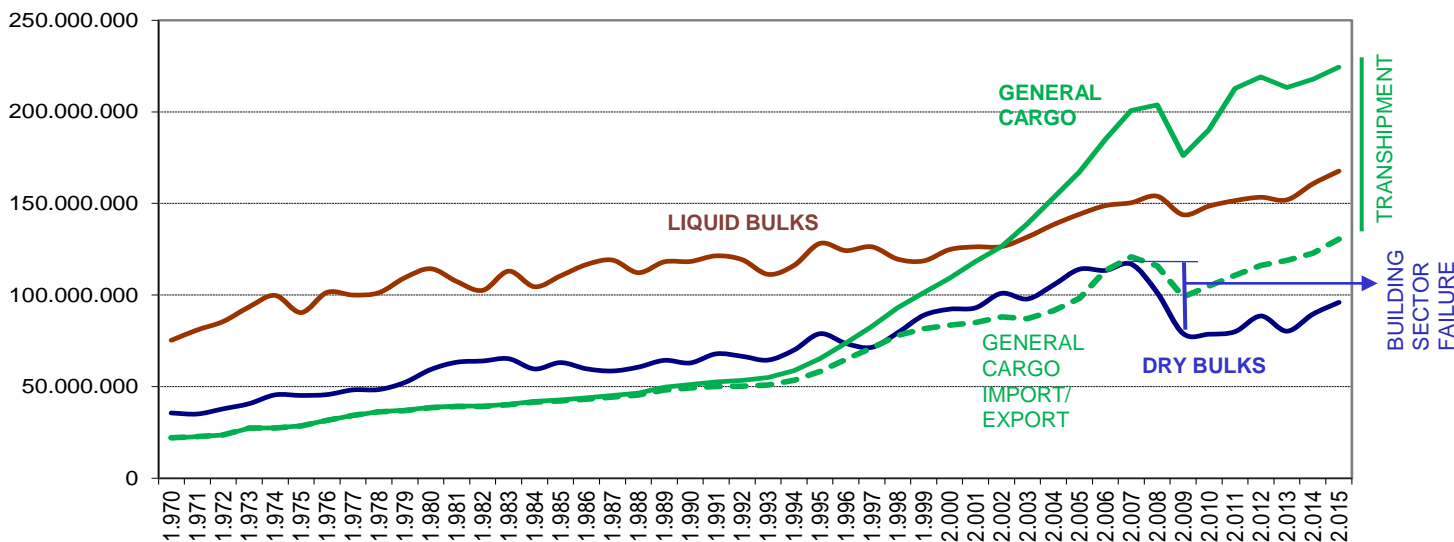
SPANISH PORT'S TRAFFIC EVOLUTION SINCE 1970



TONS per YEAR

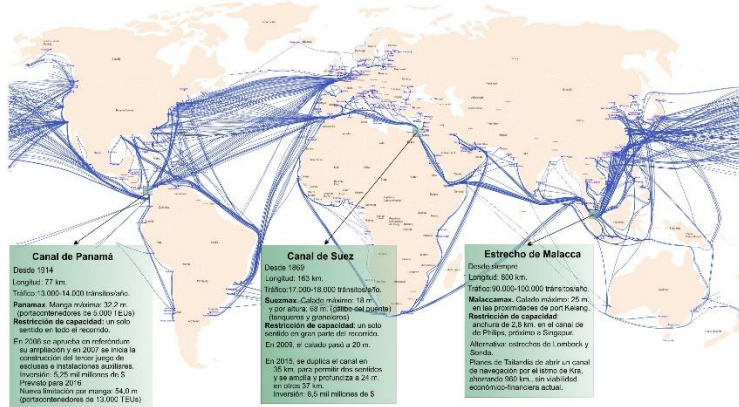


TONS per YEAR



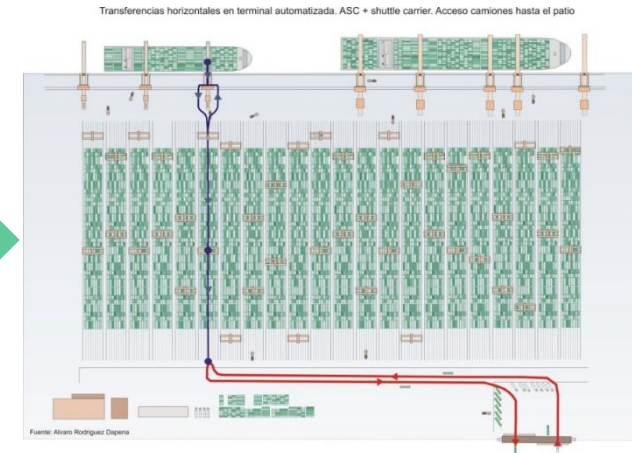
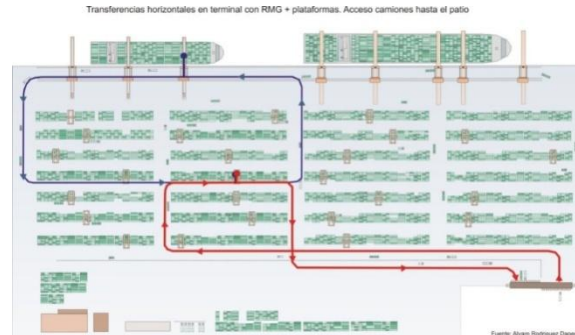
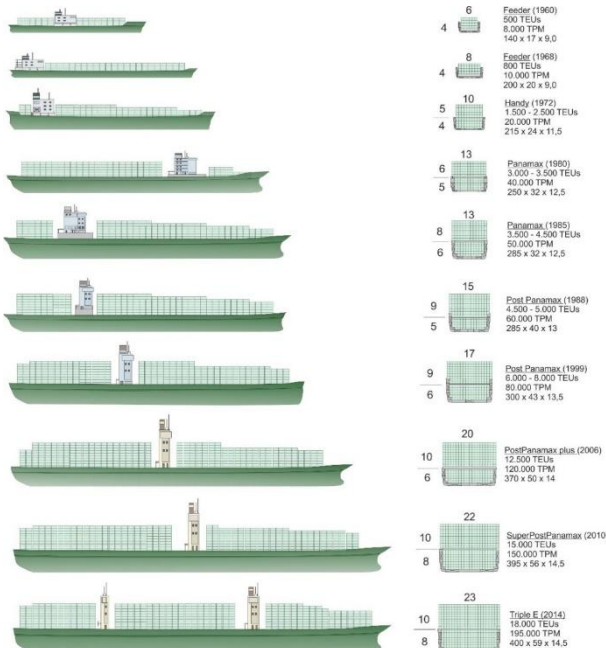
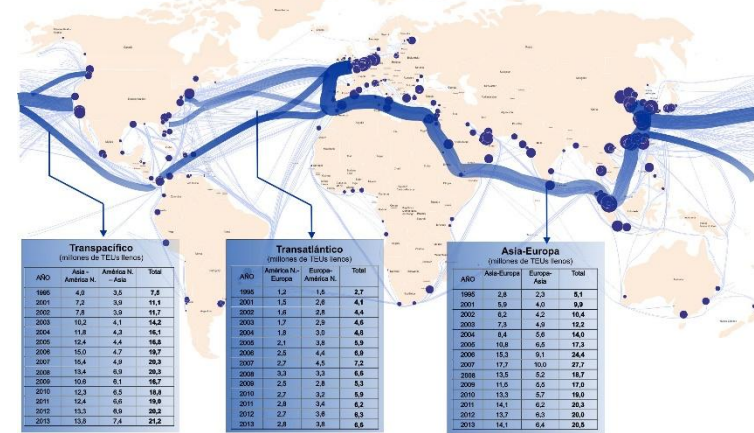


DEEP SEA (I). CONTAINERS FLOWS REVOLUTION



Canal de Suez
Desde 1869
Longitud: 163 km.
Tráfico: 17.000-18.000 transbordado.
Suezmax: Calado máximo: 18 m, y por altura: 16 m (gortacontenedores de 5.000 TEUs)
Restricción de capacidad: un solo sentido en gran parte del recorrido.
En 2015, se duplica el canal en 35 km, para permitir dos sentidos y se actualiza y profundiza a 21 m, en unos 37 km.
Inversión: 8,5 mil millones de \$

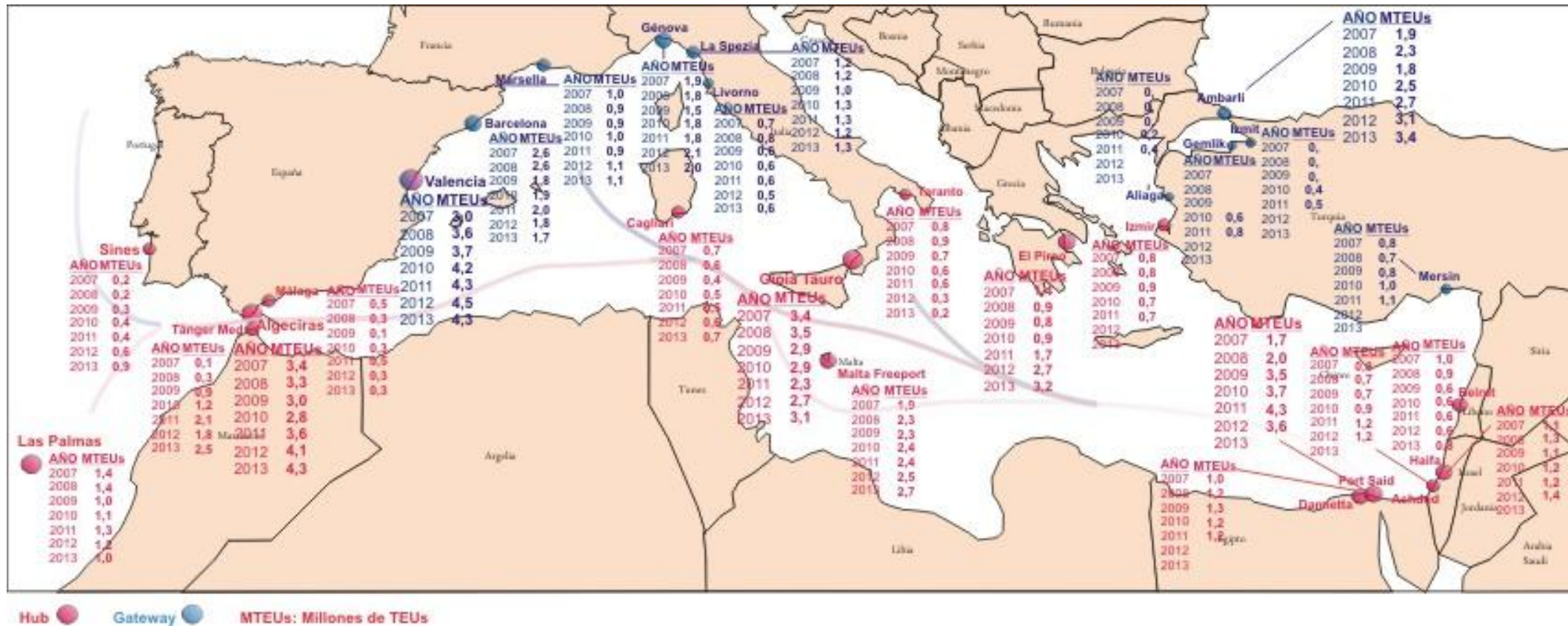
Estrecho de Malacca
Desde 1969
Longitud: 800 km.
Tráfico: 90.000-100.000 transbordado.
Malaccamax: Calado máximo: 20 m, en las proximidades de port Klang.
Restricción de capacidad: anchura de 2,8 km, en el canal de de Philips, próximo a Singapur.
Alternativa: interchinos de Lombok y Sunda.
Planes de Tailandia de abrir un canal de navegación por el istmo de Kra, abarcando 300 km, sin viabilidad económico-financiera actual.



TWO EXAMPLES IN SPAIN

- BEST TERMINAL IN PORT OF BARCELONA (HUTCHINSON)
- TTI TERMINAL IN PORT OF ALGECIRAS (HANJIN)

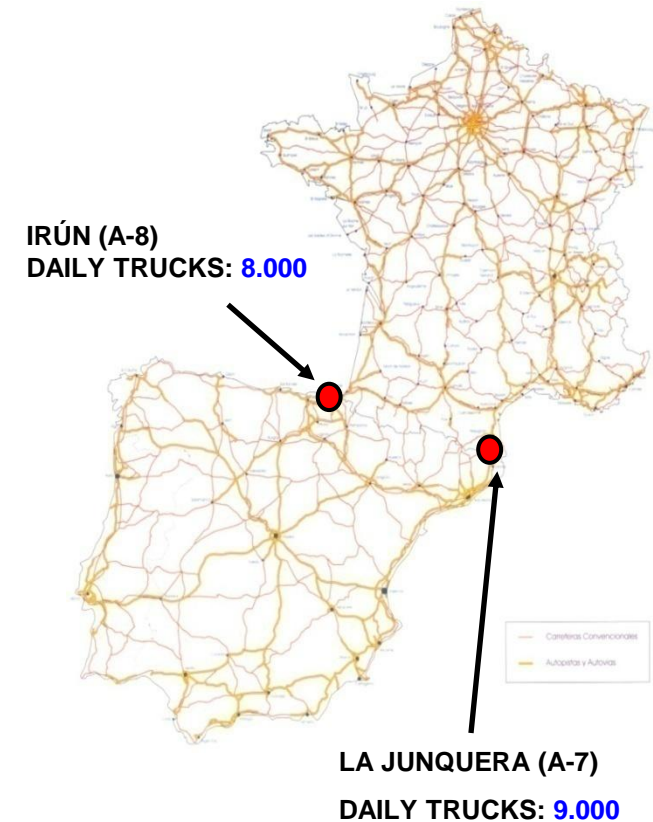
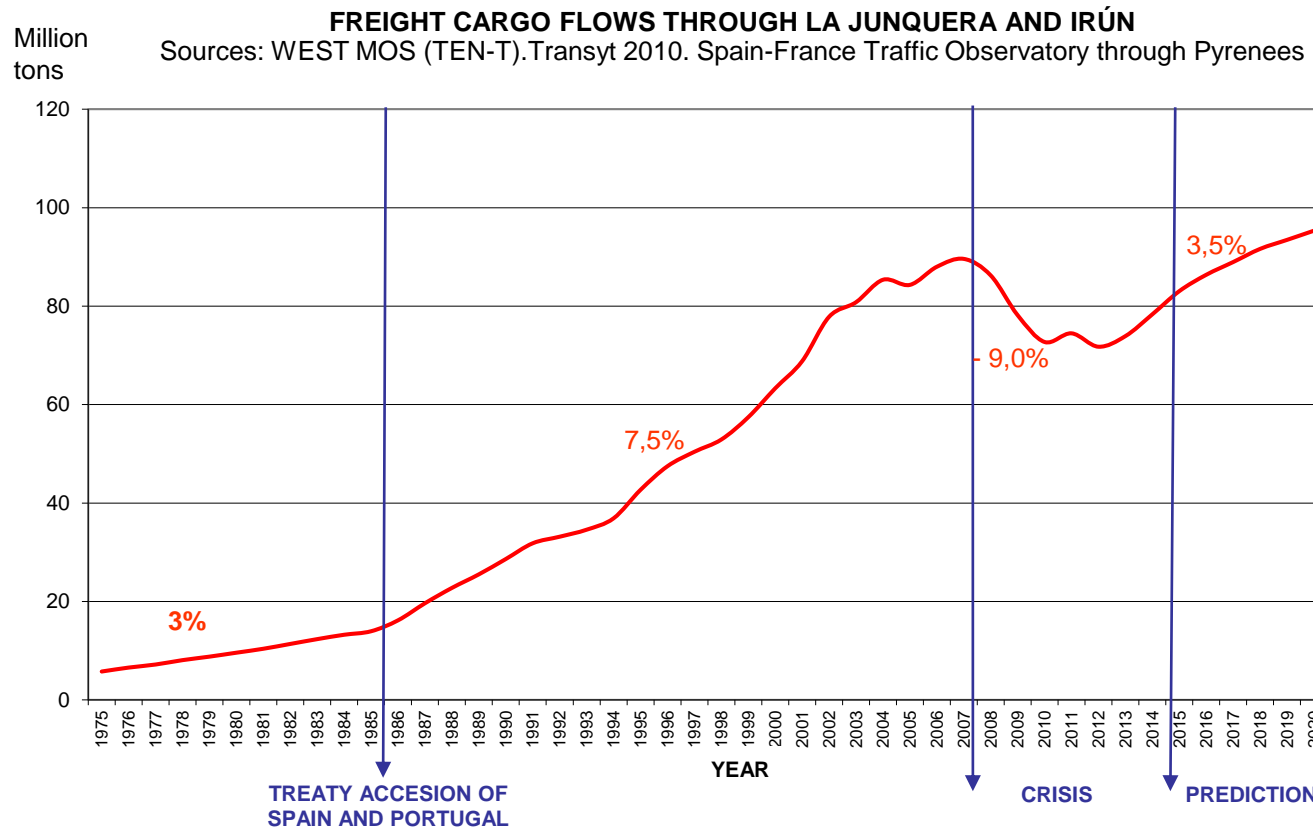
DEEP SEA (II). PORTS TRAFFIC. MARKET COMPETITION





SHORT SEA (I): SHIPPING AND MOTORWAYS OF THE SEA

TRANSFERRING CARGO FROM CONGESTED ROADS. EXAMPLE: PYRENEES ROAD SECTIONS.





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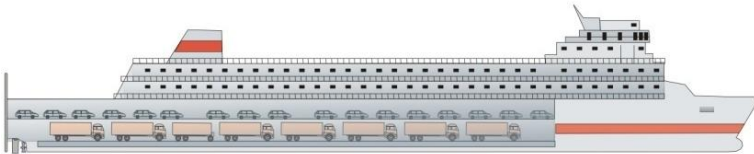


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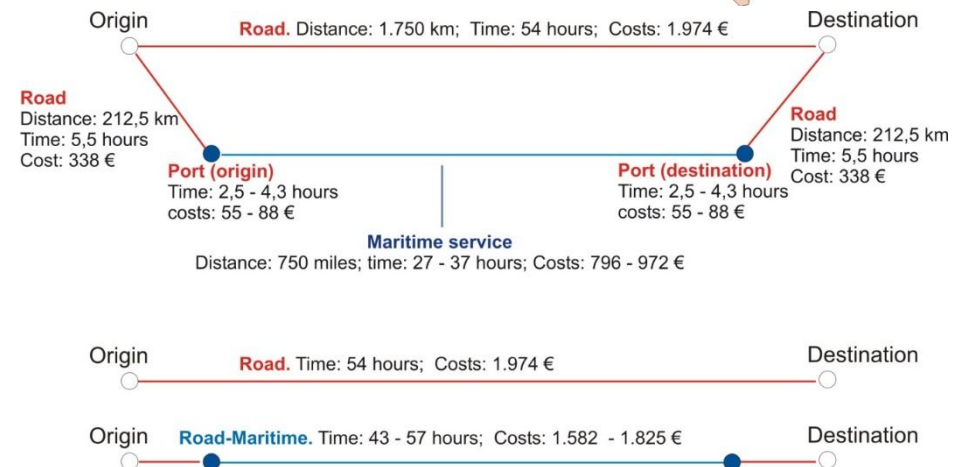
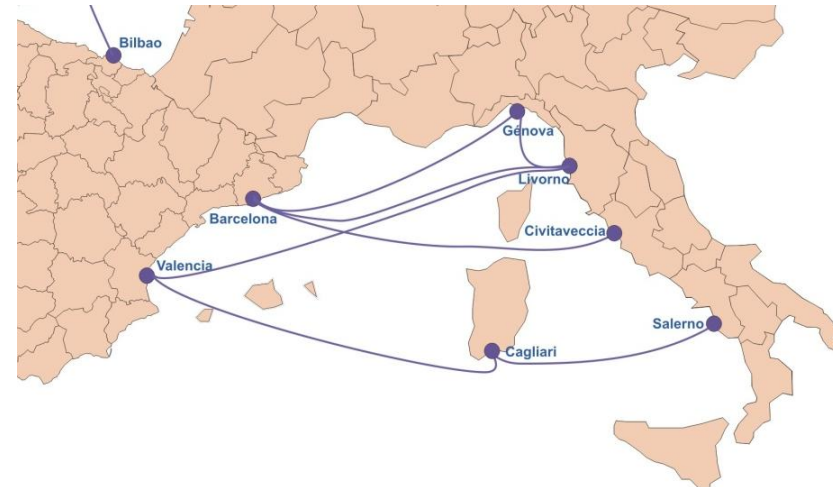
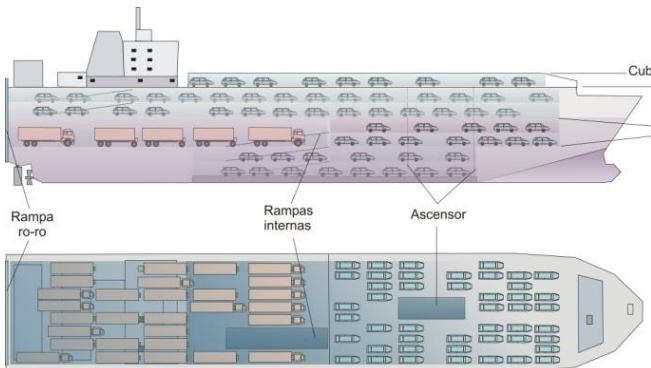
SHORT SEA (II): SHIPPING AND MOTORWAYS OF THE SEA

NETWORK OF SSS/MoS SERVICES WITH TWO OPTIONS:

1. TRUCKS WITH DRIVER



2. SEMI-TRAILERS AND PLATFORMS



SHORT SEA (III): SHIPPING AND MOTORWAYS OF THE SEA

CONSORTIUM

COORDINATOR:
PUERTOS DEL ESTADO

Four states:

Spain,
MINISTERIO DE FOMENTO. PUERTOS DEL ESTADO

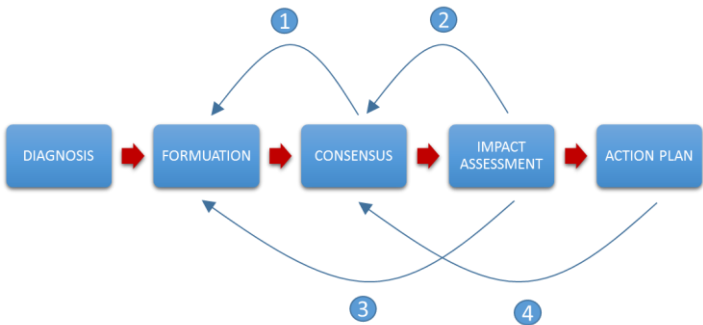
France
MINISTÈRE DE L'ÉCOLOGIE, DU DÉVELOPPEMENT DURABLE ET DE L'ÉNERGIE


Italy
MINISTERO DELLE INFRASTRUTTURE E DEI TRASPORTI. RAM.

Portugal
INSTITUTO DA MOBILIDADE E DOS TRANSPORTES, I.P



PROJECT MED ATLANTIC ECOBONUS



ACTIVITY	DESCRIPTION	LEADER
ACTIVITY 0	Project Management	
ACTIVITY 1	Background Information and Diagnosis	
ACTIVITY 2	Scheme Formulation	
ACTIVITY 3	Scope and Consensus	
ACTIVITY 4	Impact Assessment and Programme	
ACTIVITY 5	Dissemination	

BUDGET:

Total: 1,93 M€
European fund: 0,965M€

PERIOD:

2015-2017

Expected results:

Mechanism to provide public aids to MoS demand

Based on:

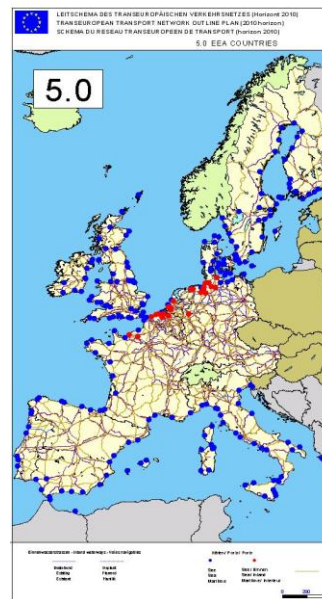
- Market study
- Financing requirements
- Juridical procedures
- Technology for implementation



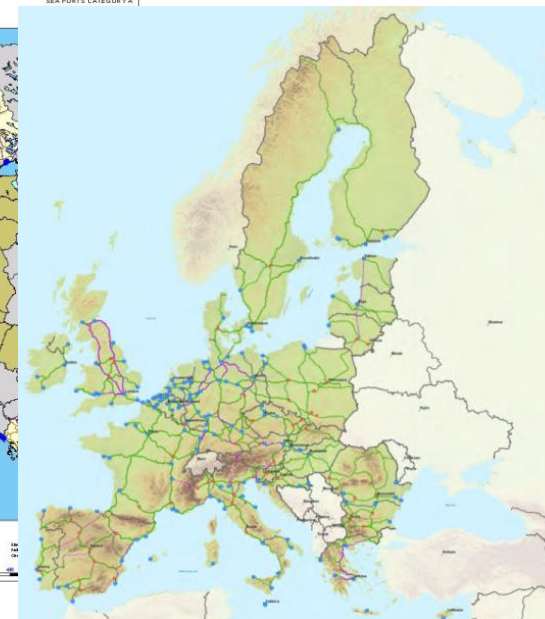
COMMON TRANSPORT POLICY. TEN-T AND MARKET

INFRASTRUCTURES: TRANSEUROPEAN NETWORK – TRANSPORT (TEN-T)

- 1996 OUTLINE OF A MASTER PLAN FOR **ROADS, RAILWAYS AND WATERWAYS**
- 2001 FIRST INCLUSION OF **PORTS** BY CATEGORIES
- 2004 LIST OF PRIORITY ACTIONS, INCLUDING “**MOTORWAYS OF THE SEA**” (Nº 21).
- 2009 CONSULTING PROCESS FOR TEN-T REVIEW
- 2010-2013 **CORE AND COMPREHENSIVE NETWORK. MULTIMODAL CORRIDORS.**
REGLAMENTS EUROPEAN FUNDS 2014 – 2020. **CEF, EFSI**



TEN-T. CORE PORTS



SERVICES. REGULATION.

- Since 80s **EU DIRECTIVES AND REGLAMENTS** DRIVEN TO PROMOTE AND GUARANTEE FREE AND FAIR COMPETITION WITHIN THE MARKET, IN ORDER TO ALLOW PRIVATE COMPANIES TO ACCESS TRANSPORT SERVICES PROVISION WITHOUT ANY KIND OF DISTORTION

MARKET ACCESS TO PORTS SERVICES AND FINANCING TRANSPARENCY FOR PORTS.

PUBLIC FINANCING OF TRANSPORT INFRASTRUCTURES & SERVICES

- INCLUSION OF EXEMPTIONS PROVISIONS FOR PORTS AND AIRPORTS IN THE COMMISSION REGULATION DECLARING CERTAIN CATEGORIES OF AIDS COMPATIBLE WITH THE INTERNAL MARKET IN APPLICATION OF ARTICLES 107 AND 108 OF THE TREATY.
(GENERAL BLOCK EXEMPTION REGULATION).



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PUBLIC & PRIVATE SECTORS' ROLE IN PORTS

Public sector

Regulator

Responsible of “public interest”. Control of
“public domain”. Active application of rules
Co-operation with other public regulators
Assistance to port community to comply rules
Providing expertise outside the port

Planner

Development of port integrated in
European/National/regional/local plans based on
comercial basis with financial support with an
optimal allocation of public resources.
Assistance for implementation and maintenance.
Environmental. Sustainable development.

Facilitator

Active “real estate” broker,
based on a dynamic use of land.
Provide services of general economic interest.
Shareholder in PPP projects.
Port charges and quality/risk control with different
options for sustainability
Training, R&D, ICT support...

Private sector

Operator

Efficiency in port operations.
Labour and equipment management.
Interoperability with maritime and land transport.

Services provider

Fulfil demand requirements on ports services
under competition with high quality/cost ratio.
Port involved in global logistic network
Integration in port community, based on an
active participation using ICT.

Developer

Provide financial resources, assuming risks
Provide technology.
Contribute to sustainability.

PUBLIC & PRIVATE SECTORS' ROLE IN PORTS

Port elements	Public (tool port)	Land lord port	Private	General trend
LAND AND WATER				<div>PUBLIC</div>
BASIC INFRASTRUCTURES Breakwaters, dredging for new draught, port internal network, Docks and berths.				
SUPERSTRUCTURE Docks and berths, jetties, Cargo handling facilities Warehouses, tanks....				
GENERAL SERVICES PORT SERVICES. COMMERCIAL SERVICES PORT ACTIVITIES				<div>PRIVATE</div>

Public

Private



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LAND LORD PORT. PORT COMMUNITY

Port elements

LAND AND WATER

BASIC INFRASTRUCTURES

Breakwaters, dredging for new draught, port internal network, Docks and berths.

SUPERSTRUCTURE

Docks and berths, jetties, Cargo handling facilities Warehouses, tanks....

GENERAL SERVICES

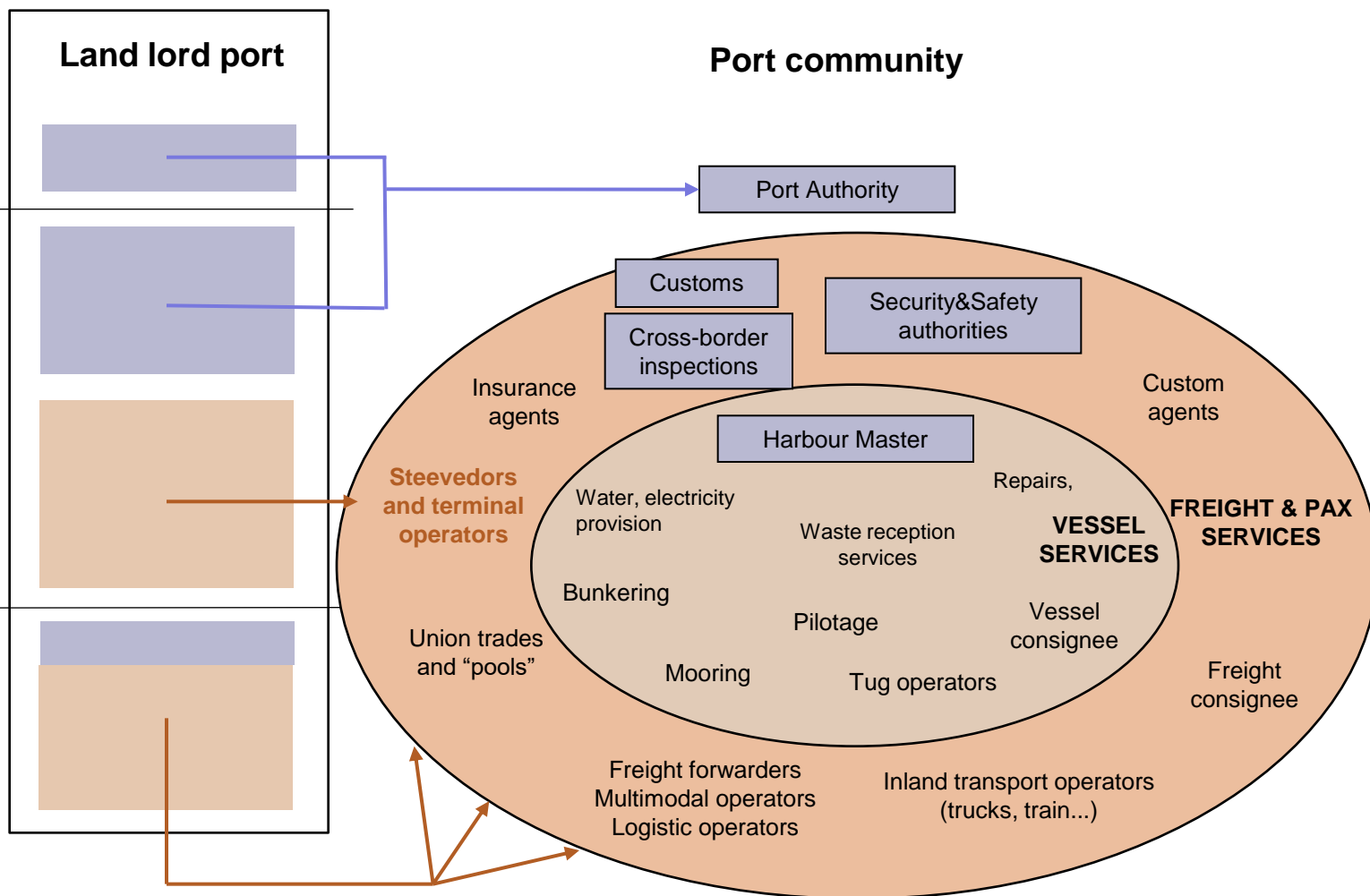
PORT SERVICES.

COMMERCIAL SERVICES

PORT ACTIVITIES

Land lord port

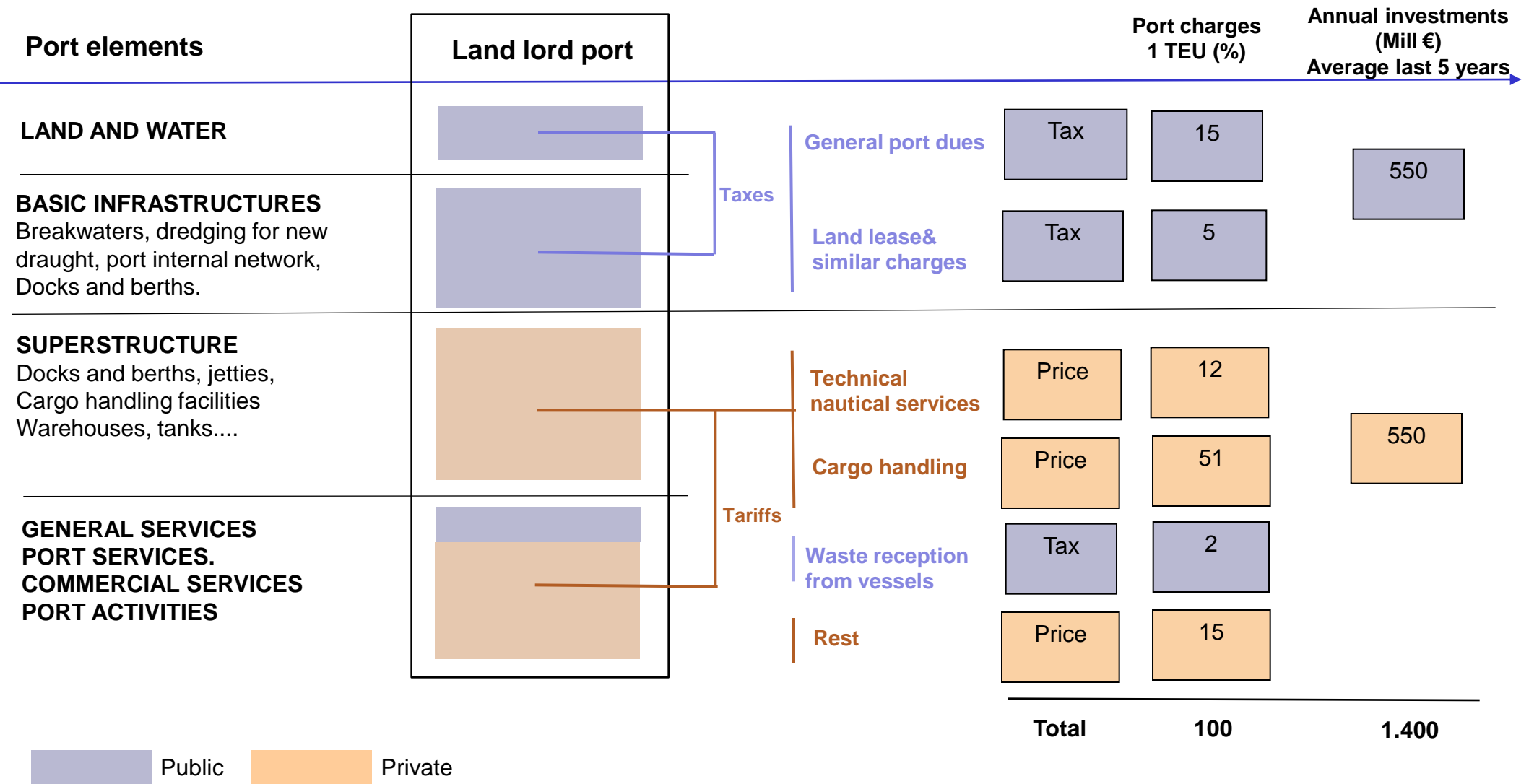
Port community



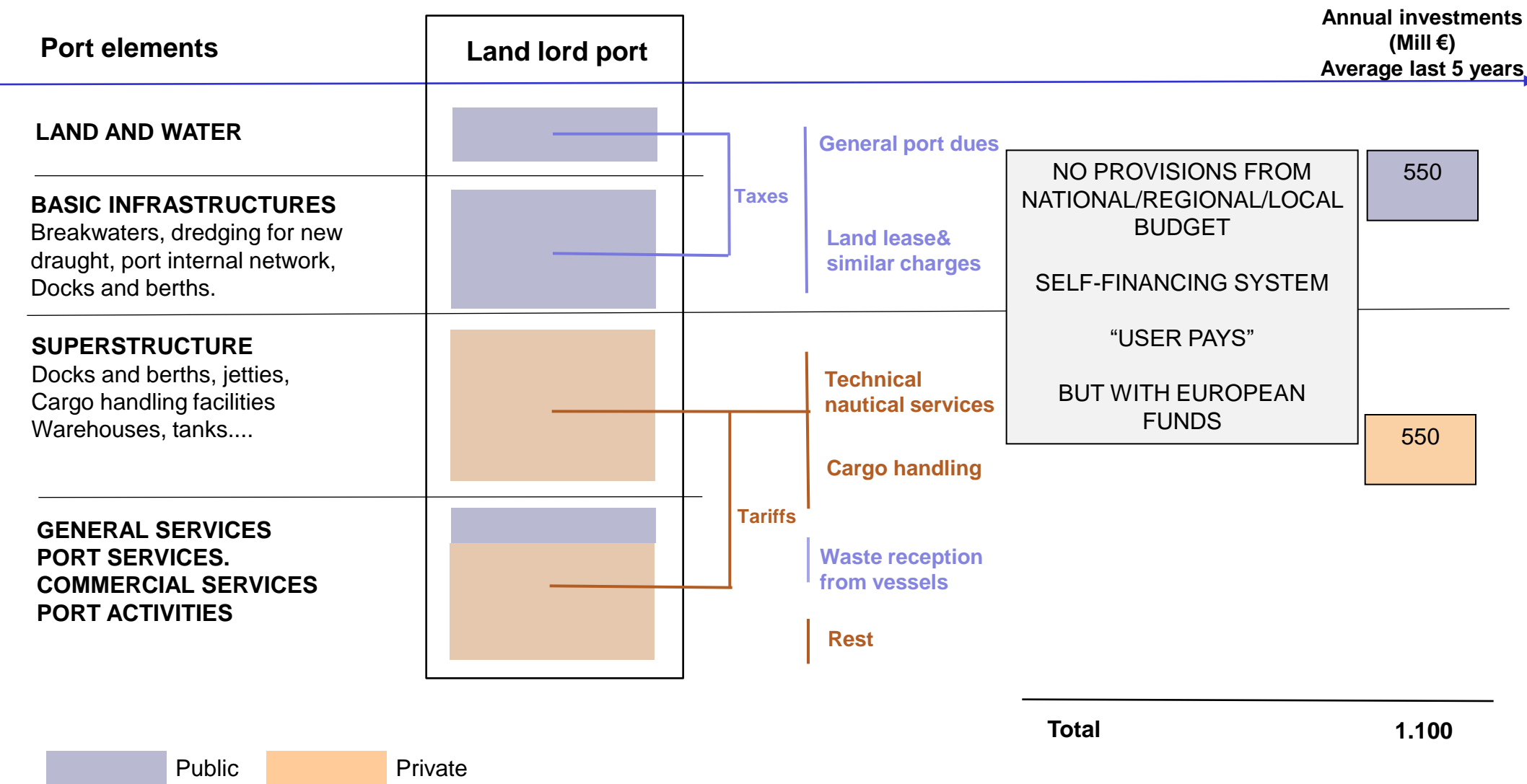
Public

Private

PUBLIC & PRIVATE SECTOR'S ROLE. PORT CHARGES IN SPAIN.



PUBLIC & PRIVATE SECTOR’S ROLE. PORT FINANCE IN SPAIN.





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The INTERNATIONAL
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PUBLIC & PRIVATE SECTOR'S ROLE.

Port elements

Land lord port

LAND AND WATER

BASIC INFRASTRUCTURES

Breakwaters, dredging for new draught, port internal network, Docks and berths.

SUPERSTRUCTURE

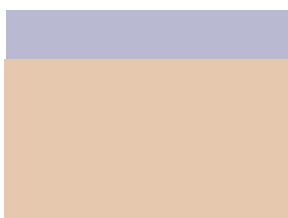
Docks and berths, jetties,
Cargo handling facilities
Warehouses, tanks....

GENERAL SERVICES

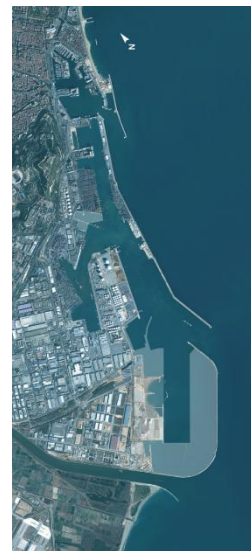
PORT SERVICES.

COMMERCIAL SERVICES

PORT ACTIVITIES



Administrative port figures in Spain



Authorisation/CONCESSION FOR LAND/PUBLIC ASSETS USE

RULES:

Specific land uses and minimum traffic
Minimum investment,
maximum duration...

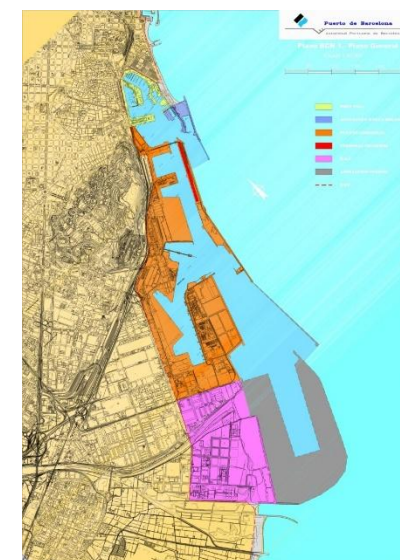


LICENSES

FOR PROVIDING A PORT SERVICE

RULES:

Minimum human and material resources,
Prices and quality of service,
maximum duration, public service oblig.



Public

Private



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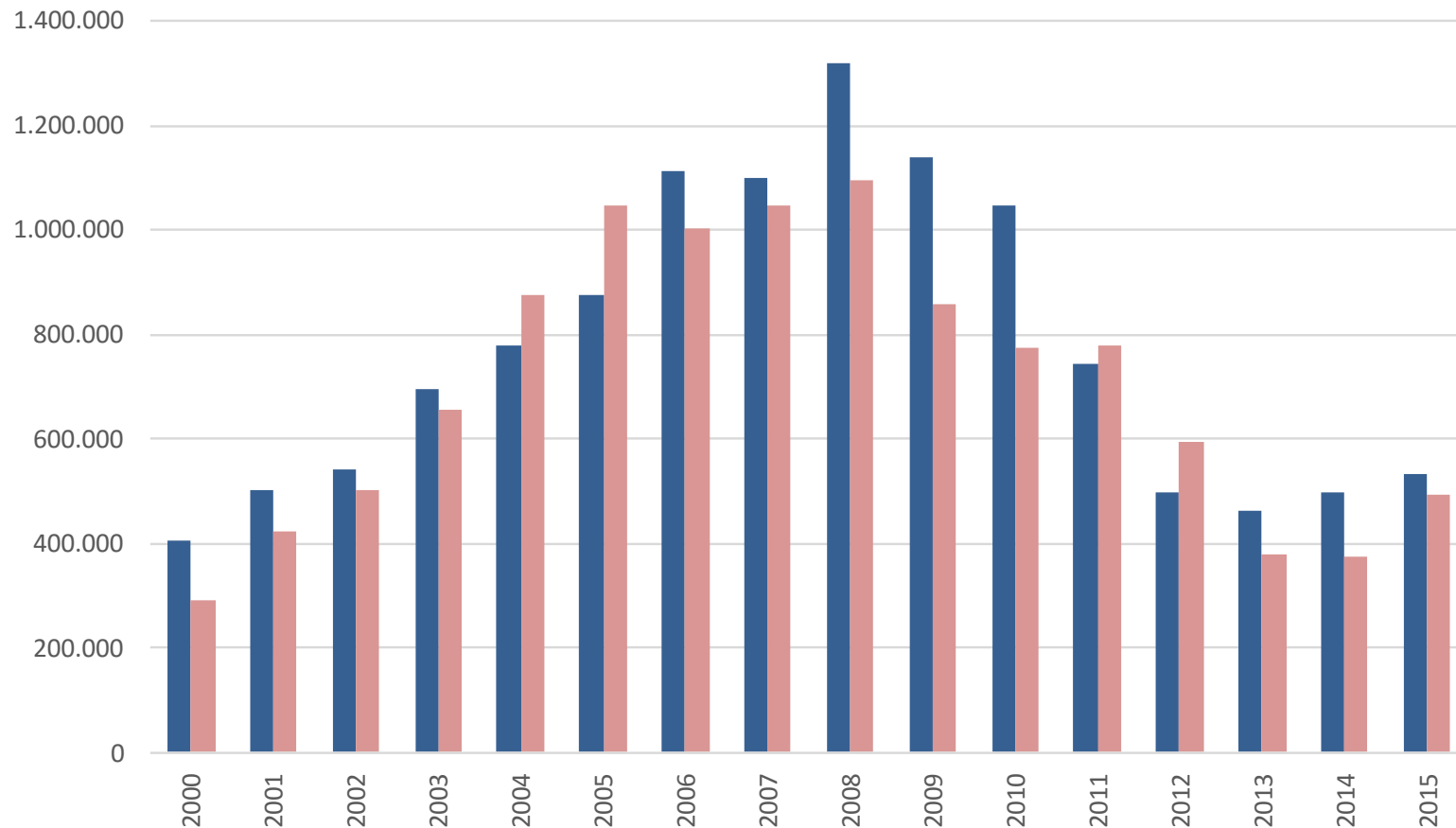
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INVESTMENTS IN SPANISH PORTS

(Thousand €)



Public



Private



PUBLIC INVESTMENTS IN SPANISH PORTS

STRATEGIC PLAN

Diagnosis
Market study.
Strategic map and objectives.
Operational objectives



MASTER PLAN

Port layout definition Medium/long term.

- Alternative scenarios
- Supply/demand.
Traffic prediction. Capacity.
- Essays. Laboratories...
- Land accesses.
- Logistic developments.

Strategic environmental evaluation



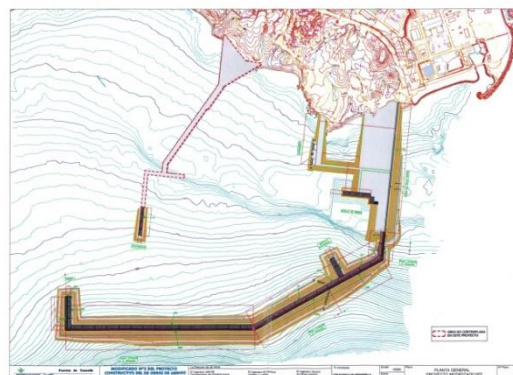
BUSINESS PLANS

Horizon: five years
Objectives and indicators
Traffic predictions
Budget: revenues, expenses;
origins and applications
Investment Plans
Sustainability Reports
Eco-sustainability
objectives & indicators



PROJECTS

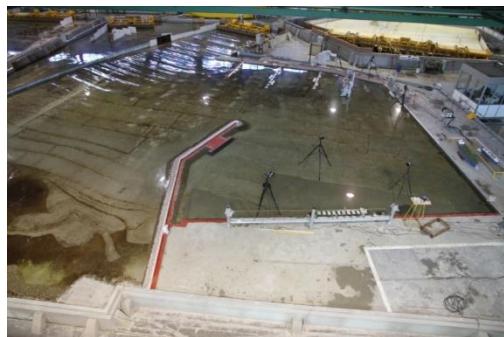
Basic infrastructures
Cost/benefit & functional
analysis
Environmental evaluation



Port of Granadilla. Tenerife.



Port of Bilbao expansion



Coruña Port. Operational simulation
Physical analysis



Almería Port. Operational simulation
Numerical analysis





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PUBLIC INVESTMENTS IN SPANISH PORTS

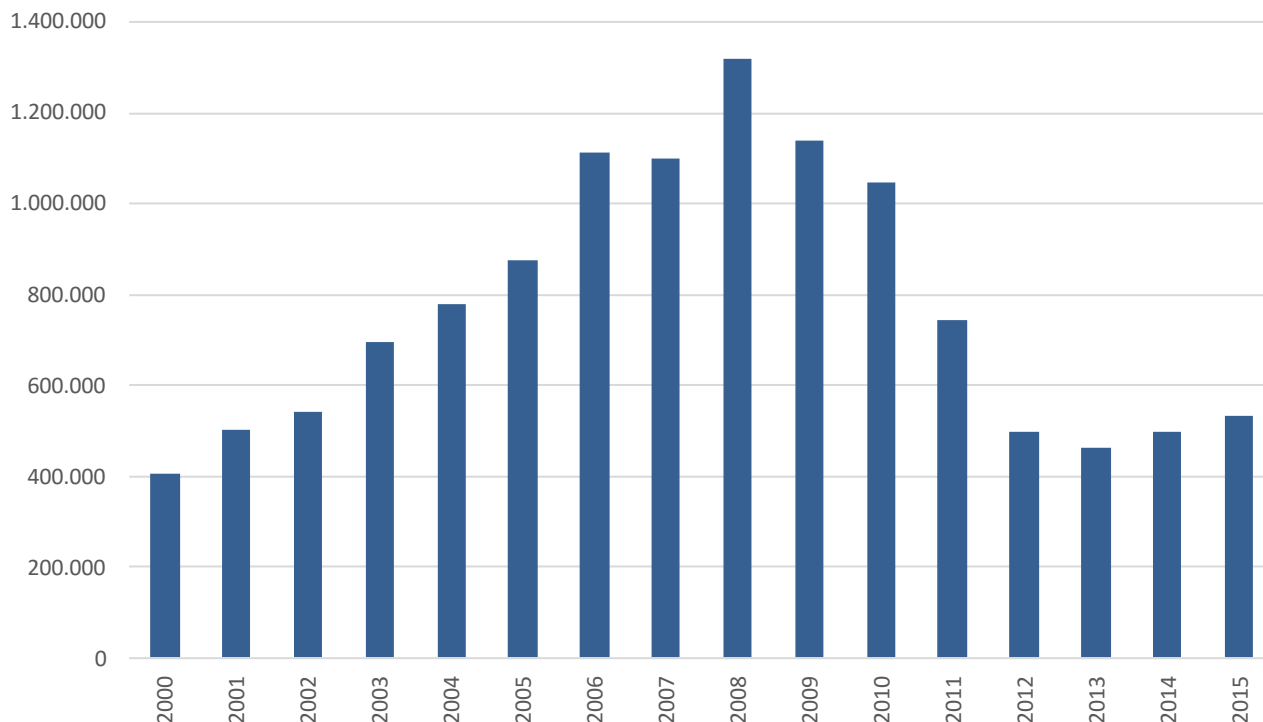
IN THE LAST 20 YEARS...

+ 30 km. of new breakwaters

Maritime terminal capacity in Spanish ports has been multiplied by 2,5.

...But not relevant new or upgrade land connections to ports, which are still pending...

Investments
(Thousand €)





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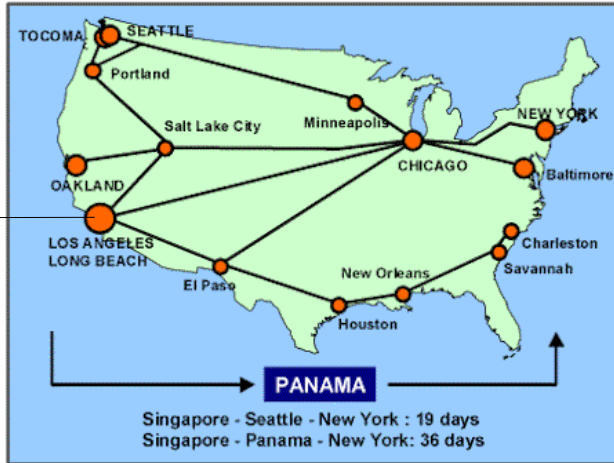
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RAIL-MARITIME INTEGRATION (1)

UNITED STATES

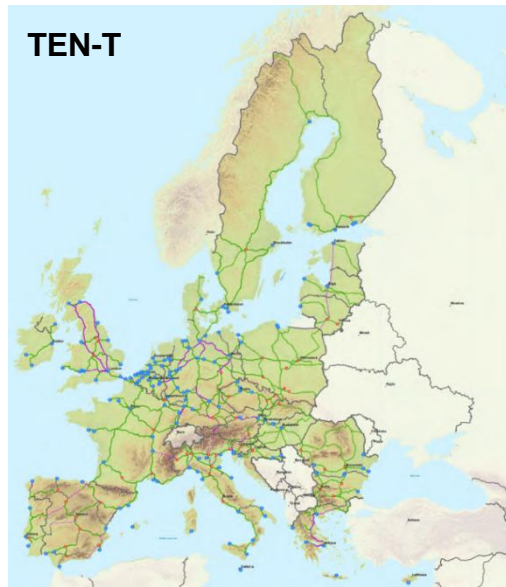


RAIL LAND BRIDGE
DOUBLE STACKED CONTAINERS IN TRAINS
MAX. LENGTH: 1.500 m.



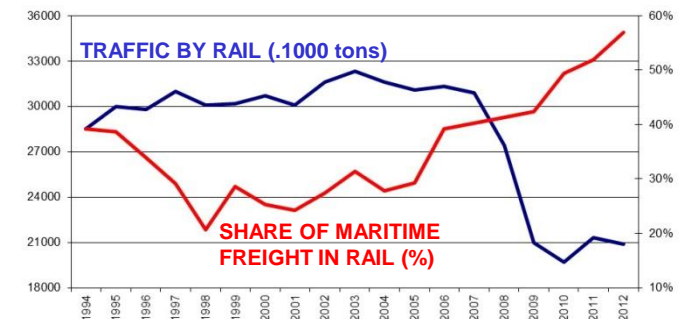
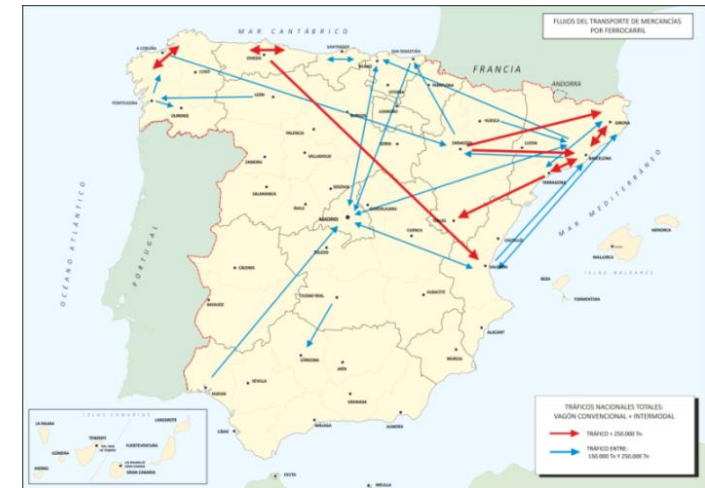
LOS ANGELES & LONG BEACH PORTS
CONNECTED THROUGH ALAMEDA CORRIDOR

EUROPE



HAMBURG PORT
EUROGATE TERMINAL

SPAIN





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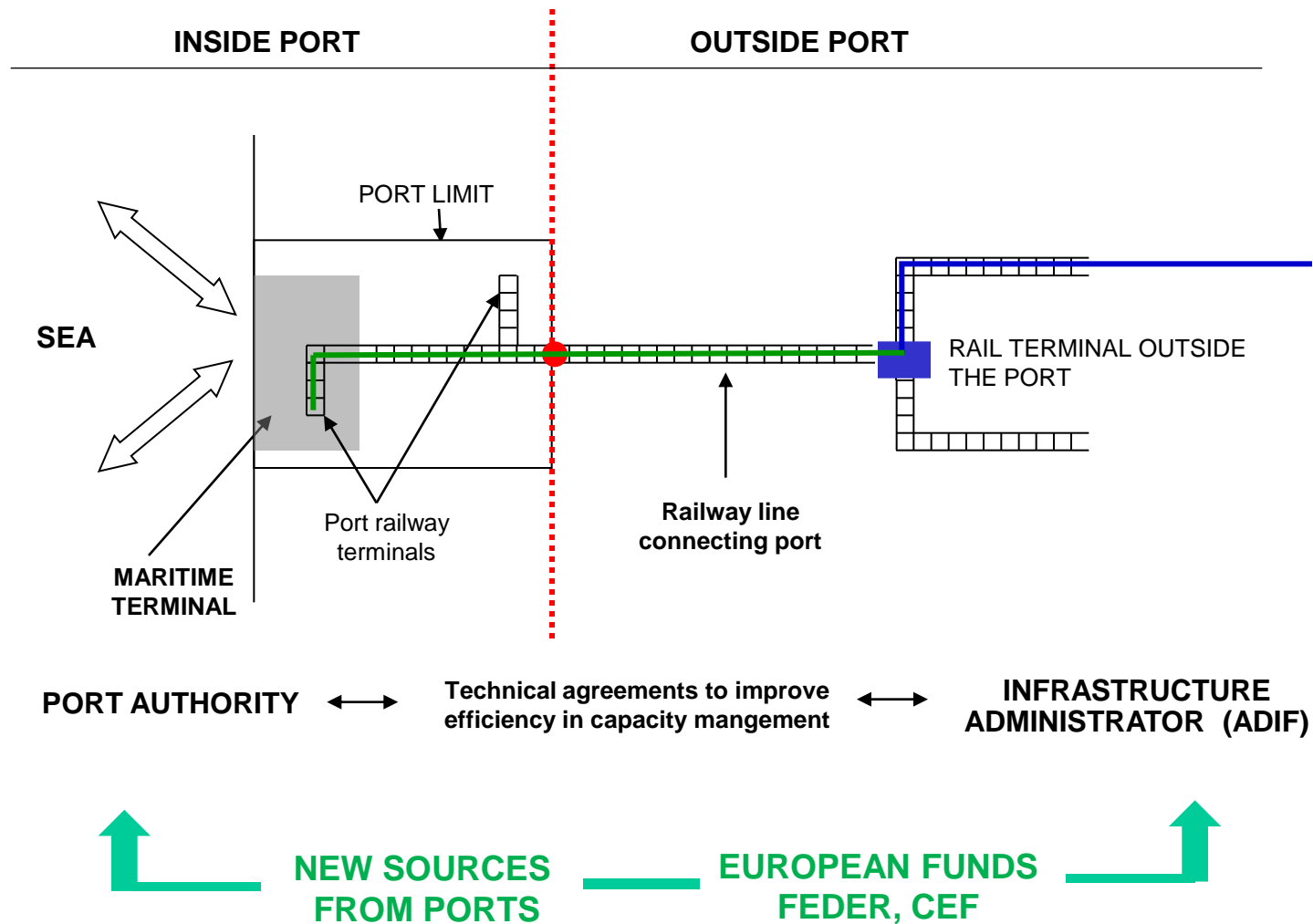
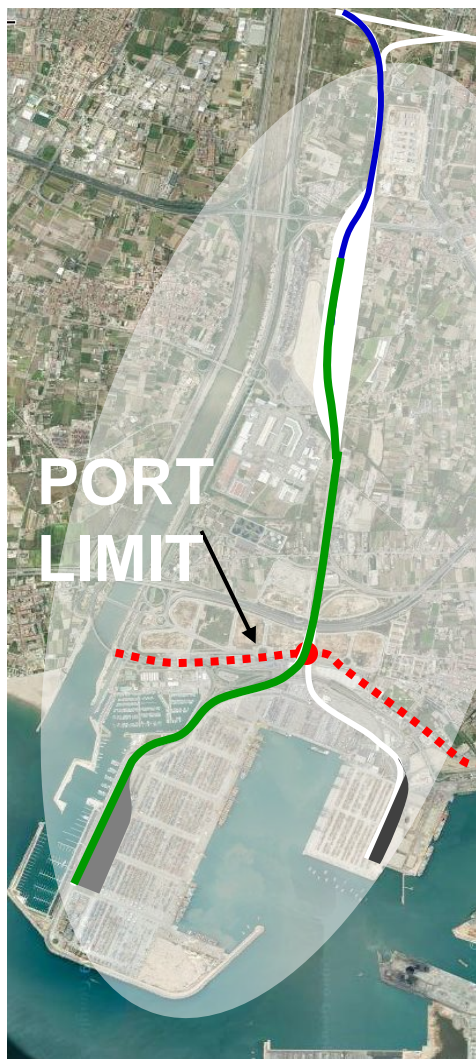
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RAIL-MARITIME INTEGRATION (2)





RAIL-MARITIME INTEGRATION (3)

NEW FUNDING FACILITY

Objective: To incorporate in Spanish ports investments plans, projects for upgrading road and rail corridors and sections linked directly to ports, with measurable effects on prices and level of service of land transport services devoted to maritime cargo. Those eligible projects could be classified into two groups:

- Last mile projects, - Projects on road and rail network,

New regulation obligates Puertos del Estado and Port Authorities to provide to the new Fund a **mandatory contribution** payable during 5 years, estimated as a predetermined percentage of their net profits. Now:

- 50% for ports inside Iberian Peninsula - 25% for ports located outside Iberian Peninsula.

This rule applies each year for Puertos del Estado and all Port Authorities with positive net profits and significant working capital (more than 150% of corresponding provisions).

If Port Authority invests in eligible projects using their own resources, then **mandatory contributions could be compensated with investments**. Accordingly to this, it is possible for Port Authorities with positive results to avoid also contributions. They have only to deploy resources to improvements of land network connected to their ports. This is the way for pushing Port Authorities to focus the attention on land side, instead of maritime side, highly equipped with infrastructures in most cases.

Mandatory contributions to this Fund, and also voluntary ones, are considered by Fund as credit obligations to be returned based on floating interest rates. Port Authorities will recover mandatory contributions through regular payments made by the Fund during 20 years with 3-years grace period.

By other side, Puertos del Estado and Port Authorities can take to the Fund to apply for a loan devoted to investment projects in road or rail connections to ports. The credit will be refunded to Fund also based on floating interest rates, and during a maximum period of 20 years with no more than 3-years grace period.



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RAIL-MARITIME INTEGRATION (4) NEW FUNDING FACILITY

All credit terms and eligible projects are decided by a Committee of representatives of Puertos del Estado and all Port Authorities (29 members).

- July 2015: First meeting of the Committee
- December 2015: Second meeting of the Committee.

2015 AGREEMENTS: 29 projects has been unanimously agreed achieving a total amount of 466.7 M€ (million euros) until 2019.

- Last mile projects: 377.5 M€ (352.2 M€ rail and 25.3 M€ road)
- Upgrading actions only on some rail corridors: 89.2 M€ will.

New Fund will cover 425.4 M€ and the rest will be financed by CEF/TEN-T or FEDER funds.

PORT FUNDING: 103,233 M€



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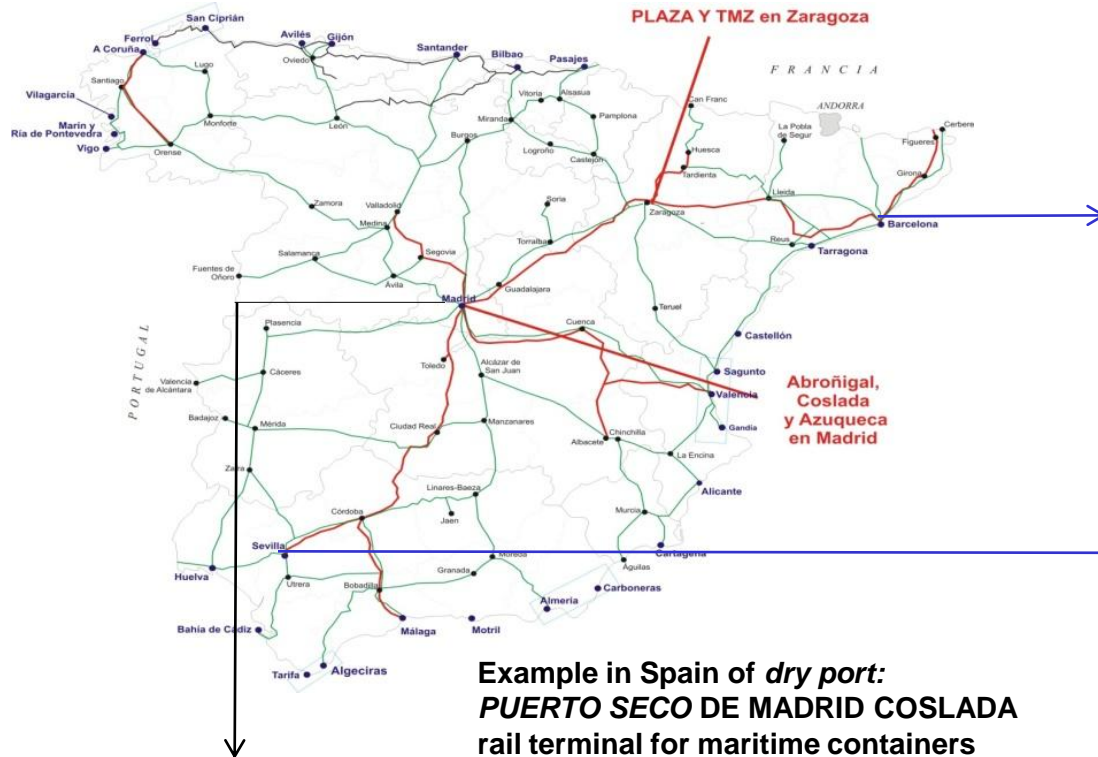
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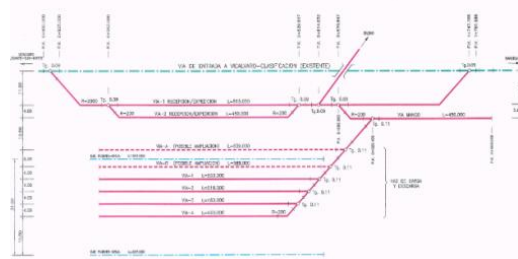
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REINFORCING THE LOGISTIC FUNCTION OF PORTS.

EXISTING MAIN DRY PORTS IN SPAIN



Example in Spain of *dry port*:
PUERTO SECO DE MADRID COSLADA
rail terminal for maritime containers



LOGISTIC ACTIVITIES ZONES

ZAL OF PORT OF BARCELONA

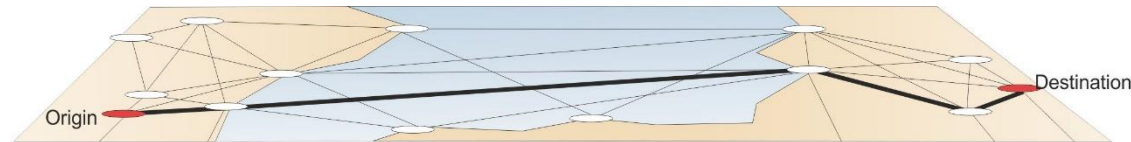


ZAL OF PORT OF SEVILLA

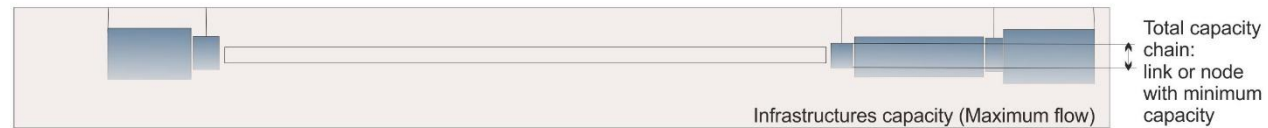




IMPROVING LOGISTIC CHAINS....



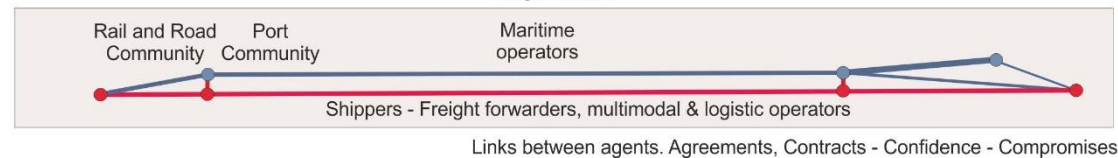
INFRA-STRUCTURES LEVEL: Nodes and links
Capacity - Level of service



SERVICES LEVEL. FACILITIES AND ROLLING STOCK.
Prices, Reliability, timing, frequency...



INFO-STRUCTURES LEVEL: LINKS BETWEEN AGENTS (ICT)
Single window





PORTS COMPETITIVENESS

LOCATION AND ACCESIBILITY FACTORS

Production&consumption áreas (hinterland&foreland)

Logistic&transport corridors/chains

EXTERNAL FACTORS

General governance (central, local...)

Regulation framework.

Transport policies

Port-city relationship

Competitors: other ports...

Type of clients/sectors

**INTEGRATION
in the
Logistic network**

INTERNAL FACTORS

Own governance

Capacity of infrastructures/facilities

Level of performance

Price: port charges

Quality: reliability, flexibility,
transparency...

**SMART – SECURE - GREEN
– E-PORT**



GOBIERNO
DE ESPAÑA

MINISTERIO
DE FOMENTO

Puertos del Estado



Ports, Logistics and Economic Development

Barcelona, 25th April, 2016



The INTERNATIONAL
PROPELLER CLUBS

Grazie!, Gràcies!, Gracias!