



TEN-T Policy - Baltic Ports Perspective

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First results of the report:

Baltic ports in the TEN-T Policy.

Motorways of the Sea development – current achievements and future challenges



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BALTIC PORTS
ORGANIZATION

BPO's mission is to contribute to an economic, social and environmental development of the maritime transport and port industry in the Baltic Sea region, thereby strengthening the global competitiveness of the Baltic Sea region.



**Over 800 mln tons of cargo annually
in Baltic ports**

What is BPO?

- **BPO is a business organization**
- **40 major ports in the Baltic Sea**
- **Networking organization**
- **Focus on promoting sea transport in the Baltic**
- **Promoting environmental management in the ports**
- **Contributing to the sustainable development of the BSR**
- **Facilitating contacts with business partners from all around the world**
- **EU affairs**



Core ports in EU



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Throughput of core ports by region in 2012

Region	EU countries included	Total seaports throughput [million tonnes]	Share in total EU ports throughput	Number of core seaports	Share of core seaports in total throughput of the seaports in the region
North West Continent Region	North Sea part of Germany, Netherlands, Belgium, North Sea part of France	1162.3	31.3%	14	89.5%
Mediterranean Sea Region	Greece, Slovenia, Italy, Malta, Cyprus, Croatia, Mediterranean part of France, Mediterranean part of Spain,	1099.6	29.6%	32	61.4%
Baltic Sea Region	Baltic Sea part of Germany, Poland, Latvia, Lithuania, Estonia, Finland, Denmark, Sweden	633.1	17.0%	19	53.3%
Uk&Ireland	UK and Ireland	548.5	14.8%	16	82.0%
Atlantic Ocean Region	Atlantic part of France, Atlantic part of Spain, Portugal	208.1	5.6%	10	85.0%
Black Sea Region	Bulgaria, Romania	65.5	1.8%	3	73.4%
Total		3717.2	100.0%	94	73.4%



Throughput of Baltic core ports

	Port	Total turnover [thou. tonnes]	Liquid bulk goods [thou. tonnes]	Dry bulk goods [thou. tonnes]	Cargo in containers, ro-ro units and other cargo [thou. tonnes]
1	Gothenburg	41148	22810	108	18230
2	Riga	34848	7904	20804	6140
3	Klaipeda	32514	10227	14064	8224
4	Tallinn	29151	19100	4076	5975
5	Ventspils	29118	16092	10641	2386
6	Gdansk	24379	11031	6959	6389
7	Szczecin-Świnoujście	18870	2184	9477	7209
8	Lubeck	17170	24	835	16312
9	Rostock	16870	3213	5978	7679
10	HaminaKotka	14523	3404	2961	8159
11	Copenhagen-Malmo	14247	5193	2388	6665
12	Gdynia	13187	722	5625	6840
13	Helsinki	10832	41	931	9860
14	Trelleborg	10696	117	288	10291
15	Aarhus	8268	1428	2586	4254
16	Lulea	8250	502	7445	303
17	Naantali	6664	3766	818	2080
18	Stockholm	4293	504	769	3021
19	Turku	2526	190	57	2278
	TOTAL	337 554	108 452	96 810	132295



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Comprehensive ports in the Baltic Sea Region

	Denmark	Germany	Estonia	Latvia	Lithuania	Poland	Finland	Sweden
1	Aalborg	Bensersiel	Heltermaa	Liepaja	-	Police	Eckero	Gavle
2	Branden	Brake	Kuivastu				Hanko	Grisslehamn
3	Ebeltoft	Brunsbüttel	Parnu				Kaskinen	Halmstad
4	Esbjerg	Cuxhaven	Paldiski South Harbor				Kemi	Helsingborg
5	Fredericia	Emden	Rohukula				Skoldvik	Kapellskar
6	Frederikshavn	Helgoland	Sillamae				Kokkola	Karlshamn
7	Fur	Kiel	Virtsu				Maarianhamina	Karlskrona
8	Gedser	Langeoog					Oulu	Koeping
9	Helsingør	Norddeich					Pietarsaari	Norrköping
10	Hirtshals	Nordenham					Pori	Oskarshamn
11	Kalundborg	Norderney					Rauma	Oxelösund
12	Køge	Puttgarden					Rautaruuki/Raahel	Stenungsund
13	Nordby	Sassnitz						Nynäshamn
14	Odense	Stade-Butzfleth/ Brunshausen						Stromstad
15	Rødby	Wismar						Sundsvall
16	Rønne							Umeå
17	Sjællands Odde Ferry Port							Verberg
18	Spodsbjerg							Västeraås
19	Tårn(Nakskov)							Visby
20	Vejle							Ystad

TEN-T MoS projects (part I)

Lp	Project_Code	Project_Title	Member_States	Actual_Costs_(€_million)	Actual_TEN-T_Funding_(€_million)	Actual_TEN-T_Funding_Rate
1	2008-EU-21010-P	Motorway of the Sea - High Quality Rail and Intermodal Nordic Corridor Konigslinie	DE,SE	13.51	2.76	20.3%
2	2008-EU-21015-P	Motorways of the Sea projects in the Baltic Sea Area Klaipėda-Karlshamn link	LT,SE	26.04	5.24	20.1%
3	2008-EU-21020-P	Motorways of the Sea Esbjerg - Zeebrugge	BE,DK	23.79	4.76	20.0%
4	2009-EU-21010-P	Baltic Link Gdynia-Karlskrona	PL,SE	85.45	17.09	20.0%
5	2010-EU-21101-S	MoS 24 - ICT based Co-modality Promotion Center for integrating PP24 into Mediterranean MoS	BE,FR,IT,MT	4.91	2.45	50.0%
6	2010-EU-21102-S	Monitoring and Operation Services for Motorways of the Sea (MOS4MOS)	EL,ES,IT,SI	5.64	2.82	50.0%
7	2010-EU-21105-S	MIELE	CY,DE,ES,IT,PT	15.96	7.98	50.0%
8	2010-EU-21106-S	ITS Adriatic multi-port gateway	IT,SI	2.89	1.44	50.0%
9	2010-EU-21107-P	Motorway of the Sea Rostock - Gedser	DE,DK	111.79	22.35	20.0%
10	2010-EU-21108-P	The Baltic Sea Hub and Spokes Project	DK,EE,SE	172.63	15.80	8.0%
11	2010-EU-21109-S	MonaLisa	DK,FI,SE	22.47	11.23	50.0%
12	2010-EU-21112-S	LNG infrastructure of filling stations and deployment in ships	BE,DK	26.79	9.57	35.7%
13	2011-EU-21001-M	Adriamos	IT, GR	56.70	12.21	21.5%
14	2011-EU-21002-P	On Shore Power Supply - an integrated North Sea network	BE,DK,SE,UK	5.04	1.01	20.0%
15	2011-EU-21004-S	TrainMoS	DE,EL,ES,IT,PT,SE,UK	2.51	1.25	50.0%
16	2011-EU-21005-S	LNG in Baltic Sea Ports	DK,EE,FI,LV,SE	4.79	2.39	50.0%
17	2011-EU-21007-S	COSTA	EL,ES,IT,PT	3.04	1.52	50.0%
18	2011-EU-21009-M	IBUK – Intermodal Corridor	ES,UK	31.99	7.30	22.8%
19	2011-EU-21010-M	Green Bridge on Nordic Corridor	DE,SE	84.64	19.83	23.4%

maritime link based projects



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TEN-T MoS projects (part II)

Lp	Project_Code	Project_Title	Member_States	Actual_Costs_(€_million)	Actual_TEN-T_Funding_(€_million)	Actual_TEN-T_Funding_Rate
20	2012-EU-21003-P	LNG Rotterdam Gothenburg	NL, SE	171.36	34.27	20.0%
21	2012-EU-21006-S	SEAGAS	FR, ES	2.08	1.04	50.0%
22	2012-EU-21007-S	MONALISA 2.0	SE, DE, EL, ES, UK, DK, MT, FI, IT	24.32	12.16	50.0%
23	2012-EU-21008-M	Winter Navigation Motorways of the Sea WINMOS	SE, EE, FI	139.17	29.68	50%, 20%
24	2012-EU-21009-M	LNG Bunkering Infrastructure Solution and Pilot actions for Ships operating on the Motorway of the Baltic Sea	SE, FR, NL, UK	74.56	23.10	50% 20%
25	2012-EU-21010-S	PILOT SCRUBBER- New Generation Lightweight Pilot Scrubber Solution installed on Ro-ro ship operating on the Motorway of the Baltic Sea	FI, NL, SE	13.58	6.79	50.0%
26	2012-EU-21011-P	TWIN-PORT	EE, FI	56.30	11.26	20.0%
27	2012-EU-21013-M	Kvarken Multimodal Link-Midway Alignment of the Bothnian Corridor	SE, FI	20.57	6.13	50%, 20%
28	2012-EU-21017-S	Methanol-the marine fuel of the future	SE, DE, FI	22.50	11.25	50.0%
29	2012-EU-21020-S	Business to Motorways of the Sea	UK, EL, ES, IT, SI	11.39	5.70	50.0%
30	2012-EU-21021-S	WiderMoS	DE, IT, PT, ES	5.94	2.97	50.0%
31	2012-EU-21019-S	ANNA-Advanced National Networks for Administrations	NL, UK, BG, SE, EL, ES, PT, LV, FR, IT, SI, RO, CY	37.08	18.54	50.0%
32	2012-EU-21023	Sustainable Traffic Machines-On the way to greener shipping	DK, DE	12.92	6.46	50.0%
TOTAL				1292.34	318.36	24.6%

MoS projects within the Baltic Sea Region

Lp.	Project_Code	Project_Title	Member_States	Region	Action_Type	Actual_End_Date	Actual_Costs_(€_million)	Actual_TEN-T_Funding (€ million)	Actual_TEN-T_Funding_Rate
1	2008-EU-21010-P	Motorway of the Sea - High Quality Rail and Intermodal Nordic Corridor Konigslinie	DE,SE	BSR	Mixed (Studies & Works)	2013-12-31	13,51	2,76	20,3%
2	2008-EU-21015-P	Motorways of the Sea projects in the Baltic Sea Area Klaipėda-Karlshamn link	LT,SE	BSR	Mixed (Studies & Works)	2013-12-31	26,04	5,24	20,1%
3	2009-EU-21010-P	Baltic Link Gdynia-Karlskrona	PL,SE	BSR	Works	2013-10-31	85,45	17,09	20,0%
4	2010-EU-21107-P	Motorway of the Sea Rostock - Gedser	DE,DK	BSR	Mixed (Studies & Works)	2013-12-31	111,79	22,35	20,0%
5	2010-EU-21108-P	The Baltic Sea Hub and Spokes Project	DK,EE,SE	BSR	Mixed (Studies & Works)	2013-12-31	172,63	15,80	8,0%
6	2010-EU-21109-S	MonaLisa	DK,FI,SE	BSR	Studies	2013-12-31	22,47	11,23	50,0%
7	2011-EU-21005-S	LNG in Baltic Sea Ports	DK,EE,FI,LV,SE	BSR	Studies	2014-12-31	4,79	2,39	50,0%
8	2011-EU-21010-M	Green Bridge on Nordic Corridor	DE,SE	BSR	Mixed (Studies & Works)	2014-12-31	84,64	19,83	23,4%
9	2012-EU-21008-M	Winter Navigation Motorways of the Sea WINMOS	SE, EE, FI	BSR	Mixed (Studies & Works)	31-12-2015	139,17	29,68	50%, 20%
10	2012-EU-21011-P	TWIN-PORT	EE, FI	BSR	Mixed (Studies & Works)	31-12-2015	56,30	11,26	20,0%
11	2012-EU-21013-M	Kvarken Multimodal Link-Midway Alignment of the Bothnian Corridor	SE, FI	BSR	Mixed (Studies & Works)	31-12-2015	20,57	6,13	50%, 20%
12	2012-EU-21017-S	Methanol-the marine fuel of the future	SE, DE, FI	BSR	Studies	31-12-2015	22,50	11,25	50,0%
13	2012-EU-21023	Sustainable Traffic Machines-On the way to greener shipping	DK, DE	BSR	Studies	31-12-2015	12,92	6,46	50,0%
TOTAL BSR projects							772,78	161,47	
% of BSR project in total costs and funding							59,8%	50,7%	

MoS joint projects of Baltic Sea and North Sea

Lp	Project_Code	Project_Title	Member_States	Region	Action_Type	Actual_End_Date	Actual_Costs_(€_million)	Actual_TEN-T_Funding (€_million)	Actual_TEN-T_Funding_Rate
1	2010-EU-21112-S	LNG infrastructure of filling stations and deployment in ships	BE,DK	BSR, NSR	Studies	2013-03-31	26,79	9,57	35,7%
2	2011-EU-21002-P	On Shore Power Supply - an integrated North Sea network	BE,DK,SE,UK	BSR, NSR	Works	2014-12-31	5,04	1,01	20,0%
3	2012-EU-21003-P	LNG Rotterdam Gothenburg	NL, SE	BSR, NSR	Works	31-12-2015	171,36	34,27	20,0%
4	2012-EU-21009-M	LNG Bunkering Infrastructure Solution and Pilot actions for Ships operating on the Motorway of the Baltic Sea	SE, FR, NL, UK	BSR, NSR	Mixed (Studies & Works)	31-12-2015	74,56	23,10	50% 20%
5	2012-EU-21010-S	PILOT SCRUBBER- New Generation Lightweight Pilot Scrubber Solution installed on Ro-ro ship operating on the Motorway of the Baltic Sea	FI, NL, SE	BSR, NSR	Studies	31-12-2015	13,58	6,79	50,0%
TOTAL joint BSR, NSR projects							291,33	74,74	
% of joint BSR and NSR project in total costs and funding							22,5%	23,5%	

MoS joint projects of Baltic Sea, North Sea and other EU countries

Lp.	Project_Code	Project_Title	Member_States	Region	Action_Type	Actual_End_Date	Actual_Costs_(€_million)	Actual_TEN-T_Funding_(€_million)	Actual_TEN-T_Funding_Rate
1	2012-EU-21007-S	MONALISA 2.0	SE, DE, EL, ES, UK, DK, MT, FI, IT	BSR, NSR, Other EU region	Studies	31-12-2015	24,32	12,16	50,0%
2	2012-EU-21019-S	ANNA-Advanced National Networks for Administrations	NL, UK, BG, SE, EL, ES, PT, LV, FR, IT, SI, RO, CY	BSR, NSR, Other EU region	Studies	31-12-2015	37,08	18,54	50,0%
TOTAL joint BSR, NSR and other regions projects							61,39	30,70	
% of joint BSR, NSR and other EU regions project in total costs and funding							4,8%	9,6%	

TEN-T MoS projects

Summary of funding

	Number of projects	Total budget [mln Euro]	TEN-T funding [mln Euro]	% of total budget	% of total funding
All TEN-T MoS projects	32	1292.34	318.36	100%	100%
Total projects where BSR countries are involved including:	20	1125.5	266.91	87.1%	83.8%
only BSR projects	13	772.78	161.47	59.8%	50.7%
joint BSR, NSR projects	5	291.33	74.74	22.5%	23.5%
joint BSR, NSR and other EU regions projects	2	61.39	30.70	4.8%	9.6%
Total projects of countries outside the BSR	12	166.84	51.45	12.9%	16.2%

TEN-T MoS projects that addresses the environmental challenges of MoS, in particular in view of the implementation requirements of Annex VI of the IMO's MARPOL Convention

Lp.	Project_Code	Project_Title	Member_States	Region	Action_Type	Actual_End_Date	Actual_Costs_(€_million)	Actual_TEN-T_Funding_(€_million)	Actual_TEN-T_Funding_Rate
1	2010-EU-21112-S	LNG infrastructure of filling stations and deployment in ships	BE,DK	BSR, NSR	Studies	31/03/2013	26.79	9.57	35.7%
2	2011-EU-21002-P	On Shore Power Supply - an integrated North Sea network	BE,DK,SE,UK	BSR, NSR	Works	31/12/2014	5.04	1.01	20.0%
3	2011-EU-21005-S	LNG in Baltic Sea Ports	DK,EE,FI,LV,SE	BSR	Studies	31/12/2014	4.79	2.39	50.0%
4	2011-EU-21007-S	COSTA	EL,ES,IT,PT	Other EU regions	Studies	30/04/2014	3.04	1.52	50.0%
5	2011-EU-21010-M	Green Bridge on Nordic Corridor	DE,SE	BSR	Mixed (Studies & Works)	31/12/2014	84.64	19.83	23.4%
6	2012-EU-21003-P	LNG Rotterdam Gothenburg	NL, SE	BSR, NSR	Works	31/12/2015	171.36	34.27	20.0%
7	2012-EU-21006-S	SEAGAS	FR, ES	NSR	Studies	31/12/2015	2.08	1.04	50.0%
8	2012-EU-21009-M	LNG Bunkering Infrastructure Solution and Pilot actions for Ships operating on the Motorway of the Baltic Sea	SE, FR, NL, UK	BSR, NSR	Mixed (Studies & Works)	31/12/2015	74.56	23.10	50% 20%
9	2012-EU-21010-S	PILOT SCRUBBER- New Generation Lightweight Pilot Scrubber Solution installed on Ro-ro ship operating on the Motorway of the Baltic Sea	FI, NL, SE	BSR, NSR	Studies	31/12/2015	13.58	6.79	50.0%
10	2012-EU-21023	Sustainable Traffic Machines-On the way to greener shipping	DK, DE	BSR	Studies	31/12/2015	12.92	6.46	50.0%



Conclusions

- **19 core ports, 70 (plus) comprehensive ports in BSR**
- **Number of MoS projects in BSR increased in last years**
- **Mainly due to the new priorities on environmental regulations**
- **A few maritime link projects – why?**

Conclusions

Inclusion of ports in TEN-T Corridors?



Conclusions

- **What status of Core or Comprehensive port means?**

REGULATION (EU) No 1315/2013 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on Union guidelines for the development of the trans-European transport network and repealing Decision No 661/2010/EU, 11 December 2013

2. Projects of common interest for motorways of the sea in the trans-European transport network shall be proposed by at least two Member States. They shall comprise:

(a) a maritime link and its hinterland connections within the core network between two or more core network ports; or

(b) a maritime link and its hinterland connections between a core network port and ports of the comprehensive network, with a special focus on the hinterland connections of the core and comprehensive network ports.