SESSION I

It is evident that there is now very significant government interest in MoS (Motorways of the Sea) and SSS (Short Sea Shipping), at both EU and Member State levels.

The EC offers support for new MoS initiatives, primarily through its TEN-T and Marco Polo Programmes.

However, Member states themselves need to do much more to help MoS services develop. The example of proposed MoS service tenders being drawn up jointly by France and Spain demonstrates what can be done to bring about new MoS services. Other Member States need to take note of this development and act accordingly to bring forward their own MoS schemes.

Various policy measures can be used to assist MoS services develop, irrespective of whether they may be international or domestic links, in an effort to compete effectively with state-funded highways. This could include measures to:

a) Help reduce short-distance road haulage costs for trailers moving to/from local ports to connect with coastal MoS service;

b) Increase long-distance road haulage costs on alternative roadways running parallel to the seaway in question;

c) Assist with finance and provision of adequate port infrastructure and intermodal handling equipment;

d) Share some of the risk with private sector operators making investments in the right type of ships; and,

e) Assist with service start-up MoS operating costs whilst traffic flows are developing.

The importance of co-modality was stressed – meaning the need to improve the efficiency of the whole transport system, across all modes including hub-spoke transhipment.

SESSION II

In a number of instances MoS services have been introduced to help circumvent road transport constraints. Poor quality roads, tolled roads, and even the war in former Yugoslavia has led to introduction of highly successful MoS services.
A more difficult challenge to provide MoS services exists where trunk roads are in excellent condition and/or are provided free at the point of use (e.g. the UK).

Extensive feeder and SSS services already exist throughout Europe, and there is much to learn from these services.

The worsening situation with regard to port capacity represents a further constraint to MoS and SSS services.

Innovative MoS operators have helped to develop together with shipyards/designers a long series of standardised roro, ropax and container ship designs. The scale economies in terms of building and operating such a long series of standardised ships is highly pronounced. In essence, the seagoing ‘workhorses’ for effective and successful MoS services now exist and offer proven solutions.

For remote island and relatively short distance routes and trades typically under 100 miles in length, the availability of efficient high-speed craft capable of carrying both vehicles (cars and trucks/coaches) and passengers represents another proven solution, even in certain exposed sea areas (e.g. Canaries). In several short-range trades such vessels are now totally replacing traditional conventional tonnage.

SESSION III

The location of port facilities and subsequent impacts of ports on shipping service networks can help co-modality, for example by reducing overall transport movement through minimising ship deviation distances (e.g. the Scapa Flow Container Terminal proposal). The proposed TEN-T Scapa Flow project expects to deliver major reductions in freight tonne-kilometres in this way, also through reducing average feeder ship distances, leading to reductions in energy consumption and emissions.

The Euro-Coast roro network proposal demonstrated by Cuxhaven Port indicates how port collaboration can lead to potential MoS services, in this case between Iberia and Scandinavia with various hub ports included in between. Developments in roro transhipment (hub and spoke) were also highlighted.

Ports are rapidly developing expertise as major logistics and distribution centres. With the rising demand for MoS services, it makes sense for added-value activities to be coordinated within or nearby ports, as opposed to locating this activity far inland. In this sense MoS services can help to optimise the whole supply chain.

MoS are therefore more than just ships; MoS is the effective integration of ports, ships, intermodal, and logistics services.

SESSION IV

Leading edge European ship designers and shipbuilders demonstrated the benefits offered through availability of standardised and proven roro, ropax and container ship designs.
The trend towards ship upsizing, generating substantial scale economies, lower unit costs, and energy savings, is highly important and a key trend. No other transport mode can compare with the economies of scale advantages offered by sea transport vehicles. Moreover, the gap between scale economies offered by ships as compared with road/rail transport is widening, leading to even better economic performance of the former.

The availability of modern unitised vessels, with good speeds and high/flexible payloads, plus excellent reliability, offers very effective MoS solutions on many routes.

Rapid and ongoing innovations in ship design imply that the lifecycle for individual ships is shortening somewhat. The leading designers are succeeding in continually improving and adapting their products, itself generating efficiency advantages (co-modality). Operators need to constantly consider, and reconsider, optimal ship options for any given route or service.

A potential problem in the medium term could exist in regard to shipyard capacity. The relatively few specialist yards that exist are highly occupied at the moment. Should there be a substantial increase in demand for standardised MoS ship types, as might be anticipated, considerable new shipbuilding capacity will need to be found.