

# WP4 – Assessment of the Adriatic port system and its integration with hinterland

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# INTRODUCTION



- The 16 project partners provided data on 21 ports that were, thus, included into the analysis.
  - SWOT analysis for 17 ports



# INTRODUCTION



- Output No. 1: *Assessment of passengers behaviour and maritime traffic flows, traffic volumes & infrastructures and services*
- Output No. 4: *Report of common needs and priorities identified related to passenger maritime transport and its integration*
- Output No. 5: *Assessment of the scenarios linked to the development of passenger traffic, modal choices, infrastructures*
- Output No. 6: *Guidelines for a more sustainable mobility*

# Some conclusions

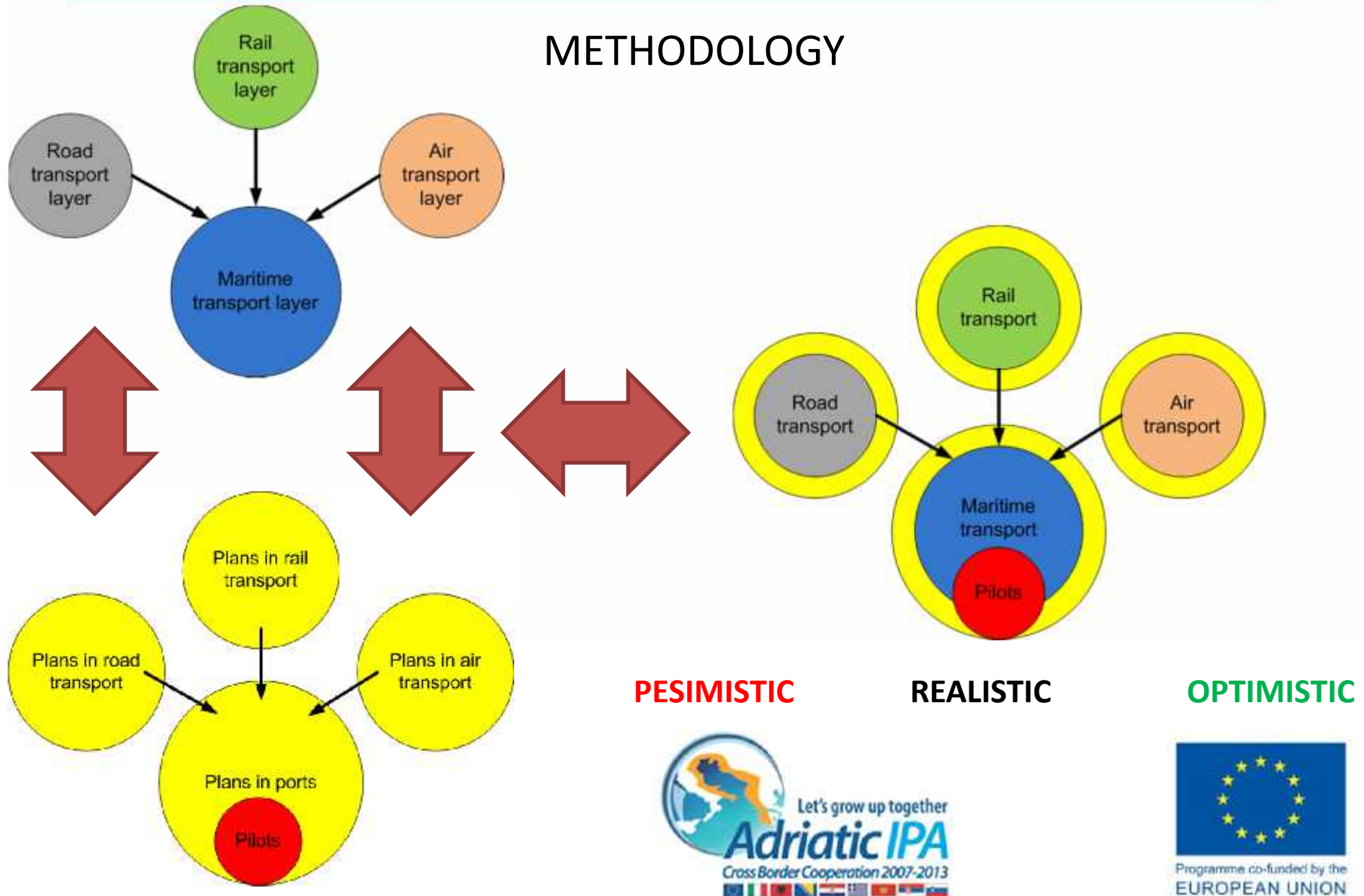


- Cruise shipping
  - Adriatic-Ionian region is gaining importance in the Mediterranean
  - The most important success factors:
    - Favourable position in the proximity to city centres and historical and/or touristic attractions
    - The selection and quality of terminal services offered
  
- Ferry shipping
  - The international ferry traffic is dropping in all analysed ports for longer period
  - The most important success factors:
    - Road connections
    - Terminal infrastructure

# OUTPUT No. 5



## METHODOLOGY





# OUTPUT No. 5: Cruise

## Scenario A – Pesimistic scenario

- The extension of the economic crisis resulting in lower purchasing power of the citizens and reflecting in lower demand for cruise tourism
- The increment of the cruise voyage revenues (if the demand proves to be higher)
- The decline of the interest of cruise tourists

## Scenario B – Realistic scenario

- Limited investment into passenger terminal facilities and services (creation of separated and safe passenger areas, wifi, info-boards, etc.)

## Scenario C – Optimistic scenario

- Improved tourist offer (more attractions, better packages etc.) resulting in increased interest for the Adriatic-Ionian destinations
  - Better rail and road connections with the hinterland, together with better transport services and options resulting in the expansion of the catchment area
  - The improvement and modernization of the existing passenger terminals or the construction of new dedicated passenger terminals
  - Good airways connections from the closes international airport (especially important for the ports that have an ambition to become a home, meaning that they have adequate in port facilities)
- The improvement of determined trends in terms of cruise ship calls and cruise passenger arrivals

→ The decrease of passenger arrivals



# OUTPUT No. 5: Ferry



## Scenario A – Pesimistic scenario

- The lack of European and national initiatives to switch road flows to the sea (towards achieving more sustainable modal split)
- The least rentable ferry lines will be discontinued
- The decline of ferry flows will continue

## Scenario B – Realistic scenario

- The European/national initiative to transfer traffic flows from the road to the sea is recognized

## Scenario C – Optimistic scenario

- The European/national initiative to transfer traffic flows from the road to the sea is recognized
- The improvement of port's road hinterland connections
- Investments into port's infrastructure
- The facilitation of boarding process (less administration, faster process, automatization, etc.)
- The growth of hinterland economies
- Better exploitation of existing lines, possibly the establishment of new lines
- Ferry flows will start to increase

Limited investments into ferry terminal infrastructure and

lines will continue





# OUTPUT No. 6: Cruise

- Ports of call
  - Proximity to touristic attractions
  - Attractiveness of excursions
  - Insufficiency in port infrastructure can be replaced by mooring in front of the port

**Ports can't  
do it alone!**

- Home ports
  - Port infrastructure and services offered within the terminal building
  - Proximity of the airport with the adequate capacities
  - Good hinterland connections



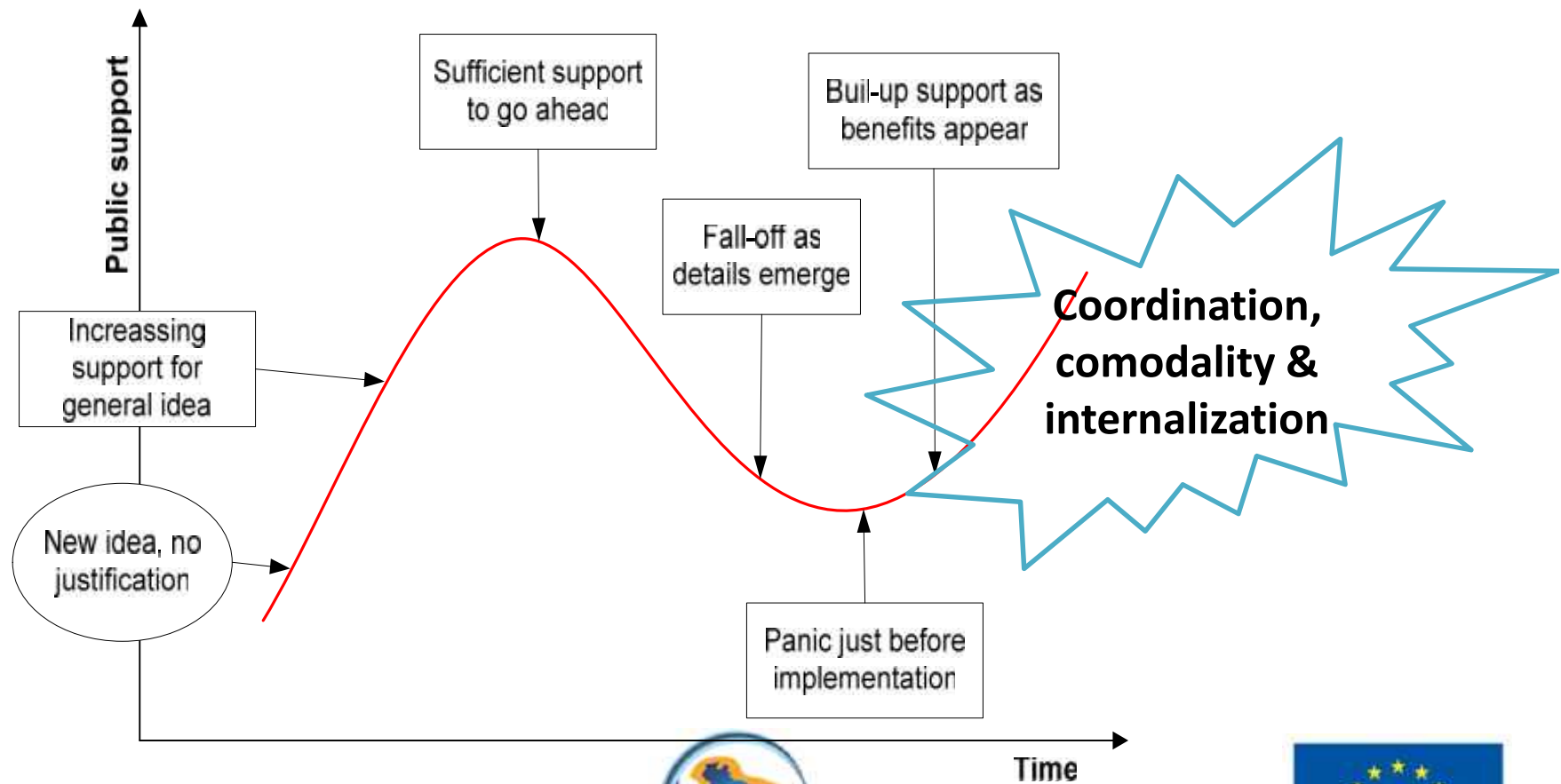
# OUTPUT No. 6: Cruise

- What is the port's capacity and/or mooring options?
- Are the locals willing to share their space with cruise passengers?
- What is the age group of passengers?
  - How long the stay in the port lasts?
  - What do passengers spend money on?
  - What is the main purpose of their visit?
- What are attractions/excursion that can be offered?
- How far are they located from existing cruise ports?



# OUTPUT No. 6: Ferry

More complicated and time consuming and less attractive in monetary terms than road only transport → European initiatives



# OUTPUT No. 6: Ferry

- Elimination or simplification of administrative procedures in intra- and extra-EU ferry lines;
- Automated registration process of passengers in ferry ports;
- Stricter pursuing and sanctioning of traffic offences committed abroad;
- Changing the structure of traffic flows by eliminating bottlenecks in other transport modes;
- Implementation of the measures and activities that are proposed in major European transport documents

# OUTPUT No. 6: Ferry

New or existing lines trade-offs:

- Speed versus cost and comfort;
- Service level versus cost;
- Seasonal considerations.



Thank you for your attention!

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