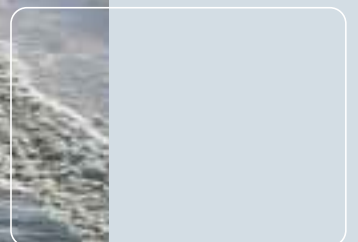
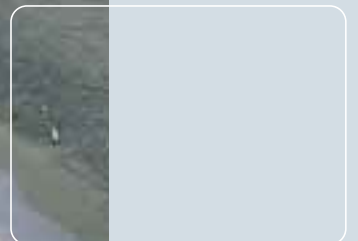
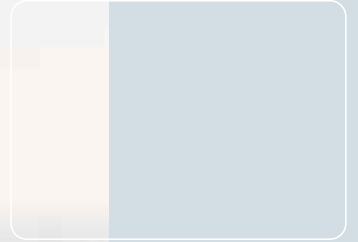
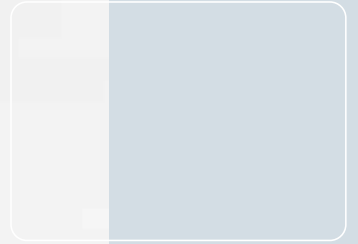


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Lattakia  
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Halifax  
Algeciras  
Gothenburg  
Mahon

# 4



# The Second Strategic Plan of the Port of Barcelona

(2003-2015)

## The strategy in the hinterland

Synthesis



The Second Strategic Plan of the Port of Barcelona was approved by the Steering Council of the Strategic Plan and the Quality Plan on the 23<sup>rd</sup> of September 2003, and ratified by Barcelona Port Authority's Administration Board in the session of the 29<sup>th</sup> October 2003.

This Steering Council is made up of representatives of those institutions and companies from the public and private sectors that are involved in port business. This is actually a consensus document of the Port Community, both in terms of the procedure followed to approve and draft it, involving notable members who represent what could be called the central core of port business, i.e. shipping agents, stevedoring companies, customs agents and freight forwarders.

The Second Strategic Plan is aimed at two groups:

- The Port Logistics Community (PLC) because this group is responsible for executing the plan through the working groups (WG) already set up for the first Plan and will be responsible for defining projects and actions with regard to the strategic lines of action established.
- The economic and social administrations and institutions, so that they can be informed about the future proposals and the main challenges to be faced by the Port of Barcelona and can take into account the initiatives and plans of action.

The Second Strategic Plan complements and updates the first Plan. Now that the enlargement of the Port of Barcelona has been agreed upon and set in train, this second Plan focuses on the Port's hinterland. This is because it is the market in which the future competitiveness of the Port of Barcelona will lie and therefore it is where all our efforts must be concentrated.

On the wharveside it is already clear that there is a marked trend towards equal service between the ports in most direct competition. It is therefore on land, in the hinterland,

where there is a much broader scope for differentiating between the services offered by ports.

Furthermore, the need to be competitive in the hinterland is crucial for extending the market because the shipping lines, with their ever-larger container ships, need access to a further hinterland than the current one in order to make their stopover profitable.

The document, which describes the problems, proposals for solution and the actions to be set in train to maintain and increase the competitiveness of the Port, is structured into six sections.

The first concerns the mission of the Port of Barcelona, its *raison d'être*. The second analyses the starting point, which describes the reality of the environment and the present limits and opportunities of the Port in this environment. The third section, "the strategic scenario", analyses trends in port business and the implications for the Port of Barcelona. The fourth section, "the Port network in the hinterland" is the Port of Barcelona's answer to current and future demands from its environment. The following section, "the development of the network, a key factor for success" explains what this network strategy is based upon, and what the requisites are for implementing it. The last section, "the development of the Second Strategic Plan", brings together the lines of action that should guide the projects and actions carried out. Finally, the document lays out two conditions that are unavoidable if the strategy defined for the Port is to be possible. The first condition is to avoid congestion of road traffic entering and leaving the port and the second condition is to guarantee rail accessibility to European markets.





**The mission of the Port of Barcelona: what is our raison être?**

The Port's mission as defined in the first Plan and still valid in this second Plan, is as follows:  
 "To contribute to the competitiveness of the Port's customers by providing efficient services that respond to their needs for maritime transport, land distribution and logistics services".  
 This mission makes it necessary to foster door-to-door transport and logistics services in international trade operations.

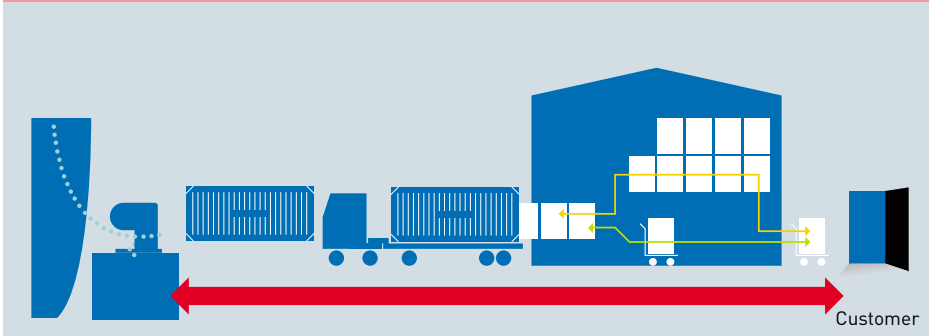


**Structure of the Strategic Plan**

What is our raison être? <b>Our mission</b>	Where are we? <b>Starting point</b>	What are the challenges? <b>The strategic scenario</b>
What do we want? <b>The strategic objective</b>  <b>The Port network in the hinterland</b>		
5 What needs to be done? <b>The development of the Port's network</b>	6 How to do it? <b>Strategic lines of action</b>	



**Completing the transport with logistics features**





**Starting point in 2003: where are we?**

**A much more competitive market for the ports**

As already suggested in the first Plan, the second Plan confirms that the Southern European ports are involved in a much more competitive market. The causes must be sought among a series of inter-related factors.

On the one hand, the globalisation of markets and European enlargement offer a clear opportunity to boost the inflow and outflow of goods in Europe from the south, in the face of the need to reduce congestion in central and northern Europe.

Likewise, the increased concentration of shipping companies and the restructuring of shipping lines due to the need for greater efficiency in operating east-west routes will tend to give advantages to the southern arc, vis-à-vis the north sea, within world maritime scenarios.

All of this is leading to the rolling out of port strategies in order to become a first order Mediterranean port in an environment in which port operators are becoming multiports and tending increasingly to

diversify their interests in other ports, and in which the increased trend in subcontracting out logistics services gives customers greater power to decide upon routes and negotiate prices.

**The Port maintains its strategic aspiration of becoming the main Euromediterranean Logistics hub, despite the increase in competition between ports and the necessary improvements in the connections with the hinterland.**

The current position of the Port is mainly characterised, on the one hand by the advances that have occurred as a result of the first Strategic Plan, with the setting up of joint actions of the Port Logistics Community. This is the case of the extension of the Quality Plan and the boost in the processes of reengineering and the PortIC e-commerce platform.

Furthermore, it is also influenced by the start of the port enlargement works and the planning of land infrastructures.

These facts justify the continuity of the Port's strategic objective. We should also point

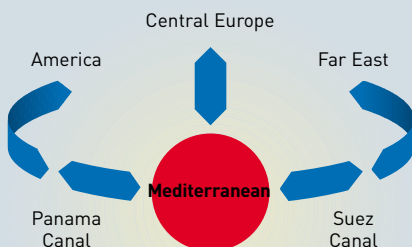


to the good position of the Port in the European traffic corridors, the fact that Barcelona is the first logistics centre in the Iberian Peninsula, and that Catalonia is pushing its logistics vocation forward in a determined fashion. This is something in which the Port must play a fundamental role.

However, there are shortcomings that affect the transport connections with the hinterland – road, rail and short-distance sea transport –, which hinder the growth and capitalisation of all the potential of the Iberian peninsula and southern European market by the Port of Barcelona. It is also important to guarantee the future conditions of land accessibility to the extended port so that congestion does not slow down the increase in traffic.



**Growing importance of the Mediterranean in maritime terms**



**Good maritime position in the traffic corridors**





**The strategic scenario:  
what are the challenges?**

The market in the hinterland (and the foreland) imposes three basic demands on the Port:

- **Guaranteeing the continuous presence of the Port close to the customers:** having an in-depth knowledge of the market and its needs and, thus, boosting nearby services to facilitate the operations of importers, exporters and other operators.
- **Being different in terms of service:** making the most of the opportunities for improvement in the co-ordination between the services provided in maritime transport and offering new more complete, door to door services with new quality standards covering the entire service.
- **Lengthening the maritime and land service by adding logistics services to cargoes.**

Internally, the Port enlargement works and the new road and rail infrastructures envisaged in the Master Rail Plan and the Road Accesses Plan should provide internal and connection infrastructures required by the strategic objective.



**Extention of the Port of Barcelona**



■ New land areas
 ■ New course of the river Llobregat

The enlargement works of the Port of Barcelona have been co-financed by the European Union Cohesion Fund



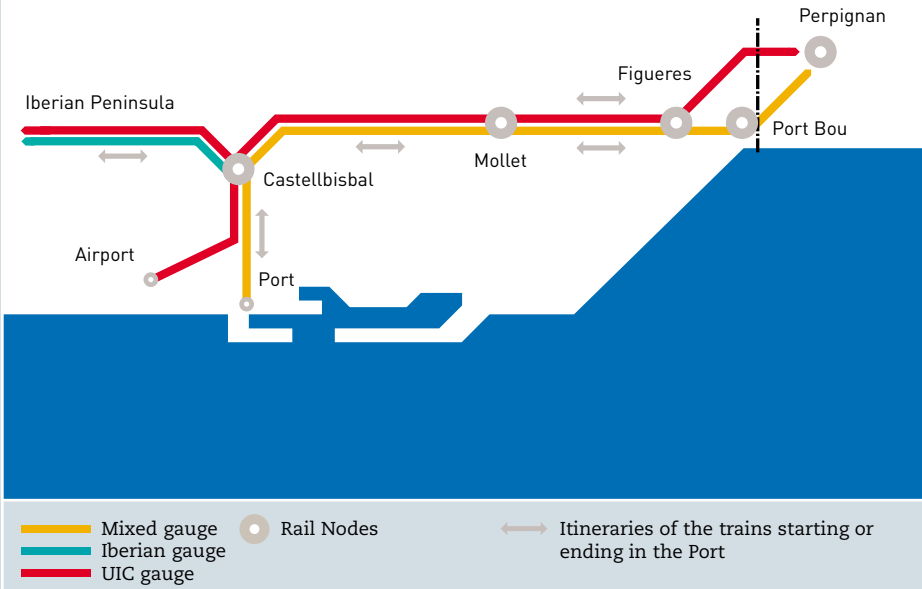
**Current and future rail connections**



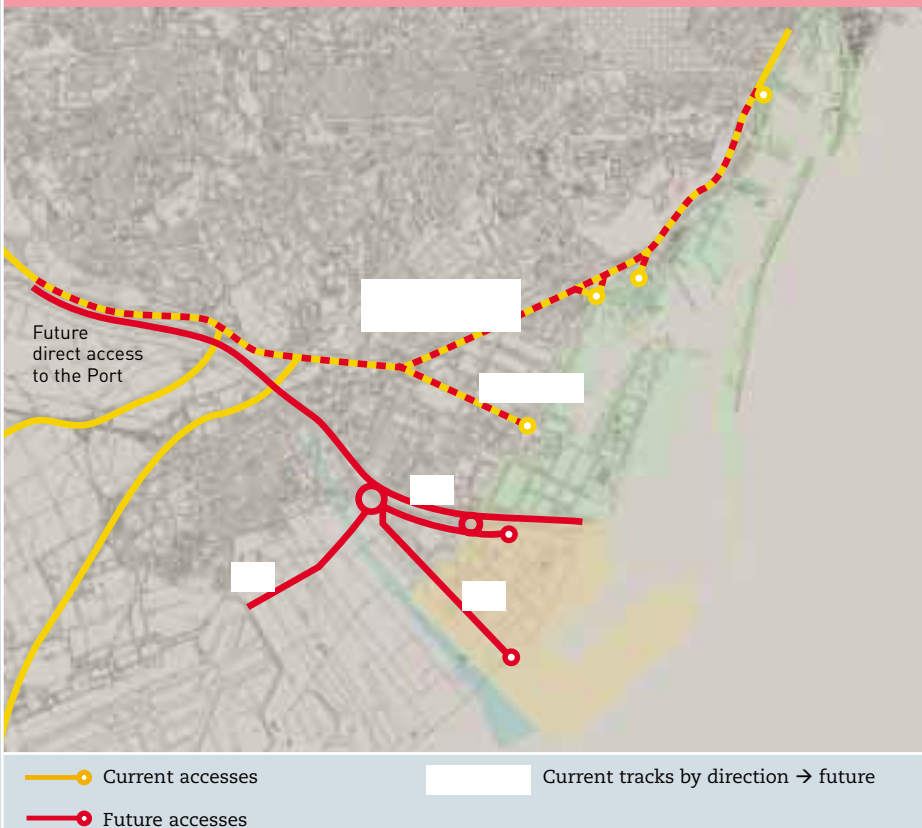
—○— Current Iberian gauge rail connections
   Loading / unloading terminals  
— Future mixed gauge rail connections
   Receiving / sending terminals



### The Port's connections with the rail network



### Road accesses to the Port



### The Port network in the hinterland: what do we want?

The aim of the Second Strategic Plan is to define the strategy to be carried out by the Port of Barcelona in the hinterland to extend and consolidate its influence in this market. This strategy is based on the creation of a network of services in the hinterland and is the Port's answer to face up to the demands of the market and move forward towards the strategic objective of becoming the prime Euromediterranean logistics hub.

The Port's network of services in the hinterland is oriented to satisfying the growing need of importers and exporters to optimise their international maritime logistics. In the field of port operations, the services offered by the ports in the most direct competition are similar. It is on land that international maritime transport offers a very broad scope for co-ordinating and organising the services and developing strategies for differentiating services that respond to the customers' requirements.



In addition, accomplishing the logistics aims of importers and exporters is a condition for attracting cargo and maintaining shipping lines – which go wherever the cargo is – and to better serve the internal and external operators/users of the Port.

The main contributions of the Port of Barcelona as a logistics network can be summed up in the following table:

Aims of the importers/exporters	Areas of improvement in international logistics	Main contributions of the port network to the optimisation of international logistics
Increasing profitability: maximum difference between logistics income and costs	Improvement in service: deadlines, safety, cargo, other services	<ul style="list-style-type: none"> <li>• Time reduction of goods through the port.</li> <li>• Transport services guaranteed from port-to-door or door-to-door</li> <li>• Safety standards and guarantees of the cargoes throughout the network</li> </ul>
Reducing investment: Minimising the circulating and fixed capital in logistics	Reduction of logistics costs: transport, stock, handling...	<ul style="list-style-type: none"> <li>• Reduction in the costs of land transport (intermodal corridors, co-ordinated local services)</li> <li>• Shared international logistics services (tmZ, tmT) and private ones</li> </ul>
	Reduction in stocks	<ul style="list-style-type: none"> <li>• Customs warehouses in the Port and distributed in the network</li> <li>• Reliability of the integrated services</li> </ul>
	Reduction of the order-payment cycle	<ul style="list-style-type: none"> <li>• Complete guaranteed services</li> <li>• Information and document exchange platform to help in the planning, execution and monitoring of the services and facilitate payments</li> </ul>
	Reduction of physical assets: warehouses, material and human means	<ul style="list-style-type: none"> <li>• Distributed facilities (warehouses, depots, etc.) to facilitate subcontracting of international logistics</li> </ul>

Furthermore, this focus on the hinterland, as a booster of door-to-door services, is projected towards the foreland, where the network strategy also applies. The second Plan focuses its efforts on the hinterland because, as the closest market, it makes it easier to identify and reach the importers and exporters, and the service initiatives can have a greater impact.

**Within the hinterland, stress is placed upon certain traffics and priority markets.**

These traffics are: full containers (especially maritime and land traffic), grouped containers, new vehicles and short sea shipping.

The priority markets are: the closest land market, comprising the northern half of the Iberian peninsular and the south of France. A competitive railway will make it possible to better serve the more distant Iberian peninsular destinations and especially southern and central Europe. The priority maritime market

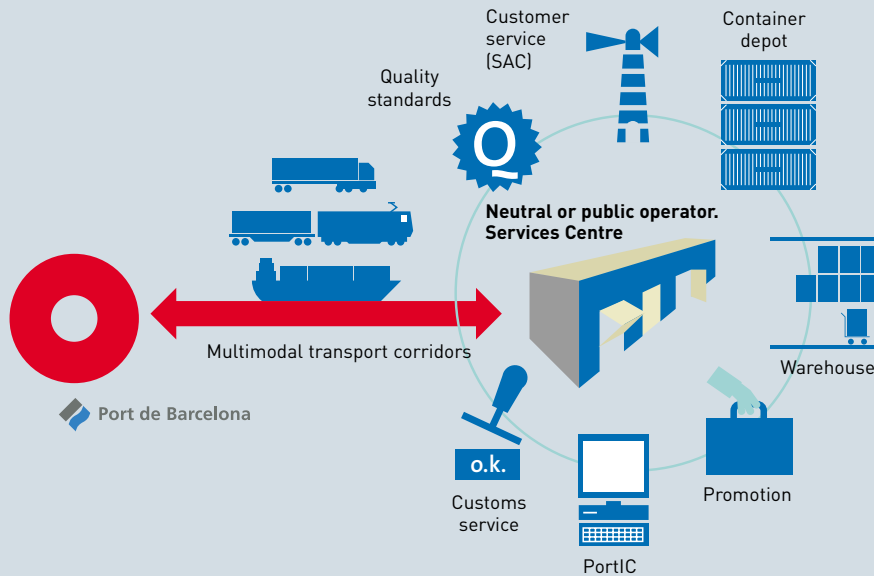
covers the southern area of Western and Eastern Europe and North Africa.

#### Priority land hinterland

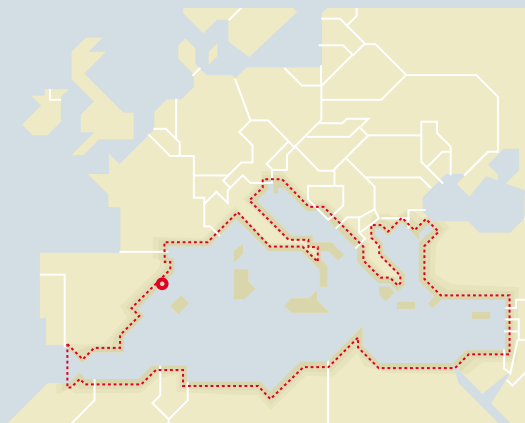




### Elements of the network



### Priority maritime hinterland



### The development of the Port's network of services: what needs to be done?

#### Definition

The Port's network in the hinterland is the group of services related to the Port, distributed throughout the territory and managed in a decentralised manner by the operators, but with the maximum co-ordination, efficiency and visibility for the customers.

The fact that sets the network apart is the fact that a port or external professional (a freight agent) can plan, organise and perform the monitoring of an import or export operation through the Port of Barcelona from any point on the network.

#### Components

This network is made up of:

- **Infrastructures and facilities:** the Port itself and the remaining services centres distributed around the territory. Also road and railway infrastructures through which the goods pass.
- **Transport and logistics services:** with complementary features such as quality standards and guarantees, and documentation and information services.
- **The promotion and management of the network,** carried out by the institutions and the Port Logistics Community, and **marketing,** by the operators.

#### Requirements for developing the network in the hinterland and strategic lines of action

Developing a port logistics network of their own that makes it possible to have access to and enlarge the hinterland requires qualitative changes in the current Port and its surrounding area. The most important of these are:

- **To continue improving the flow of goods through the Port:** in particular customs processes, those of the remaining inspection services and, in general, any that involve other administrative organisations. This includes



fostering new projects to avoid congestion in the road accesses.

- **Promoting a substantial change in port land transport:** both by rail and by road.
- **Fostering more vigorous implementation and marketing actions in the hinterland by port companies.**
- **Reconsidering short distance maritime transport** overall and attending to aspects of infrastructure, operating procedures and commercial aspects.
- **Generalising the operative**

which it will be impossible to enlarge the market. Therefore improvements, both in organisation and efficiency of the services to reduce costs are a necessary condition for the success of the Port of Barcelona's strategy.



### **Development of the Second Strategic Plan: how to do it?**

To roll out the network of services in the hinterland, the Second Strategic Plan defines seven strategic lines of action that orient the priority projects and actions.

#### **1. Land accessibility of the Port**

It is important to guarantee that the growth of the markets of the extended port is not held back by problems of congestion in the traffic into or out of the area of the

stations and terminals.

- Direct rail access to the port with double line mixed gauge track, to avoid current bottlenecks.
- Good rail accessibility with European gauge to the continent.
- Long peninsular corridors (Saragossa, Madrid, Lisbon and Galicia) and European ones (Toulouse, Bordeaux, and Lyon), with frequent direct regular services.
- Attracting rail and intermodal operators with an interest in offering regular services with the Port of



**advantages of the Port on the network.** The aim is to extend quality standards and guarantees to the network as well as facilities of exchanging documents, information and communication.

- **Transforming the operative improvements and greater collective knowledge of the market into new more complete offers that are better adapted to the customers.**
- **Extending training and teaching of the Port of Barcelona to the whole network.** Also creating an image of the "network port" to boost the efforts in all domains and fields of action.

The Port's competitiveness must be based to a great extent on the enlargement and the differentiation of service. Likewise, **the reduction in prices is a permanent and unavoidable demand of the entire logistics sector, without**

Metropolitan Region of Barcelona. The solution lies, among other actions, in:

- The rolling out of the Master Rail Plan, the Road Plan and the Port extension plan.
- Promoting overall co-ordinated solutions to face up to future conditions of mobility in the area of the Llobregat delta.
- Studying and applying specific measures in the Port that help to decongest traffic.
- Urgently building the planned road infrastructures.

#### **2. Competitiveness of rail transport**

We require viable and competitive rail transport as a means accessing the peninsular and European markets. The rail model that the Port needs is based on:

- An internal rail network, open to all the operators and co-ordinated with the nearest

Barcelona.

- A strategy of pressure in the form of a lobby with other bodies and institutions before the European Union and the Spanish Government in order to resolve existing problems of capacity in the Mediterranean traffic corridor.

#### **3. Competitiveness of road transport**

This is essential for extending markets, especially those that are within short or medium range, and will have to face the necessary challenge of modernisation in order to adapt competitiveness to the needs of the open market. This means:

- That the road container transport sector must allow other road container transport operators access.
- Greater efficiency in the organisation of services in

between transport managers and hauliers; a corporate dimension adapted to the demands of the market; modernising and opening the sector to the market; finding forms of co-operation between the companies in the sector, and having criteria for the intermodal management of transport corridors.

- The availability of resources in the internal markets, meaning shared use of transport centres, intermodal terminals, and so forth, to foster the reorganisation of

To set their offer of services apart from the rest, the Port must develop door-to-door services. In order to do this, it must foster co-operation between operators in order to have shared facilities (warehouses, sea terminals ...); and create new door-to-door offers with more integrated services, brand image and guarantees to set the Port's offer apart from its competitors.

#### 6. Marketing of services and promotion of the Port

The permanent presence of

operation between them.

- Acquire a deeper and broader knowledge of the markets: the logistics needs of importers and exporters.

#### 7. Organisation and follow-up of the services

The users of the network must be allowed to organise and monitor cargoes without geographical limitations. This involves:

- Developing the PortIC platform so that it can become a tool to be used by the entire Port Logistics Community.
- Extend information and

ing the immediate co-ordinated action of all the institutions and bodies in order, among other things, to enable the short-term execution of the planned road infrastructures.

And, secondly, **guaranteeing rail accessibility to European markets**. In the short term, both the Port of Barcelona and Spain's Mediterranean trade corridor with Europe require infrastructures that guarantee good European gauge rail accessibility to the continent.



transport with the Port.

#### 4. Short Sea Shipping

Major changes are required in order for this to become an alternative to road transport in the access to southern Europe and the hinterland of the Mediterranean. A plan needs to be prepared in to consider port aspects that have most influence upon this kind of transport, in order to:

- Have the necessary hosting and transit infrastructures for this type of transport, for both ships and lorries.
- Unify and co-ordinate services to ships and transport units in terms of port operations and procedures.
- Determine the conditions for promoting and marketing the services offered by the operators.

#### 5. Complete door-to-door services

information and an offer of services (port, maritime and logistics) in the hinterland are the conditions necessary for developing offers of services adapted to the demands of the freight handlers.

On the one hand, operators must boost the marketing of services, both those of each company and more complete services, in co-operation with each other.

On the other hand, the Port Logistics Community must work on promotion in order to facilitate the marketing of the services. This means:

- Guaranteeing the permanent presence and promotion of the Port to detect business opportunities, inform the customers of the offer and the advantages of the Port and foster and facilitate the creation of new services by the operators, seeking co-



communication facilities to all the operators of the Port logistics network.

- Offer information and communication services to freight handlers.

Finally, the Second Strategic Plan involves two unavoidable conditions for the success of the strategy described above.

First of all, **avoiding congestion of road transit into and out of the Port**. Avoiding putting the brakes on the development of the enlarged port due to congestion in the Llobregat delta is a task requir-