



MARITIME TRANSPORT WORKSHOP



Bornholm (Denmark), 18-19 feb. 2010

“ The provision of maritime transport services in the Balearic archipelago ”

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ILLES BALEARS

Islas Baleares

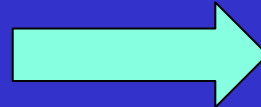


Balearic Islands



CURRENT SITUATION OF MARITIME TRANSPORT IN THE BALEARIC ARCHIPELAGO;

1. Transport between the islands



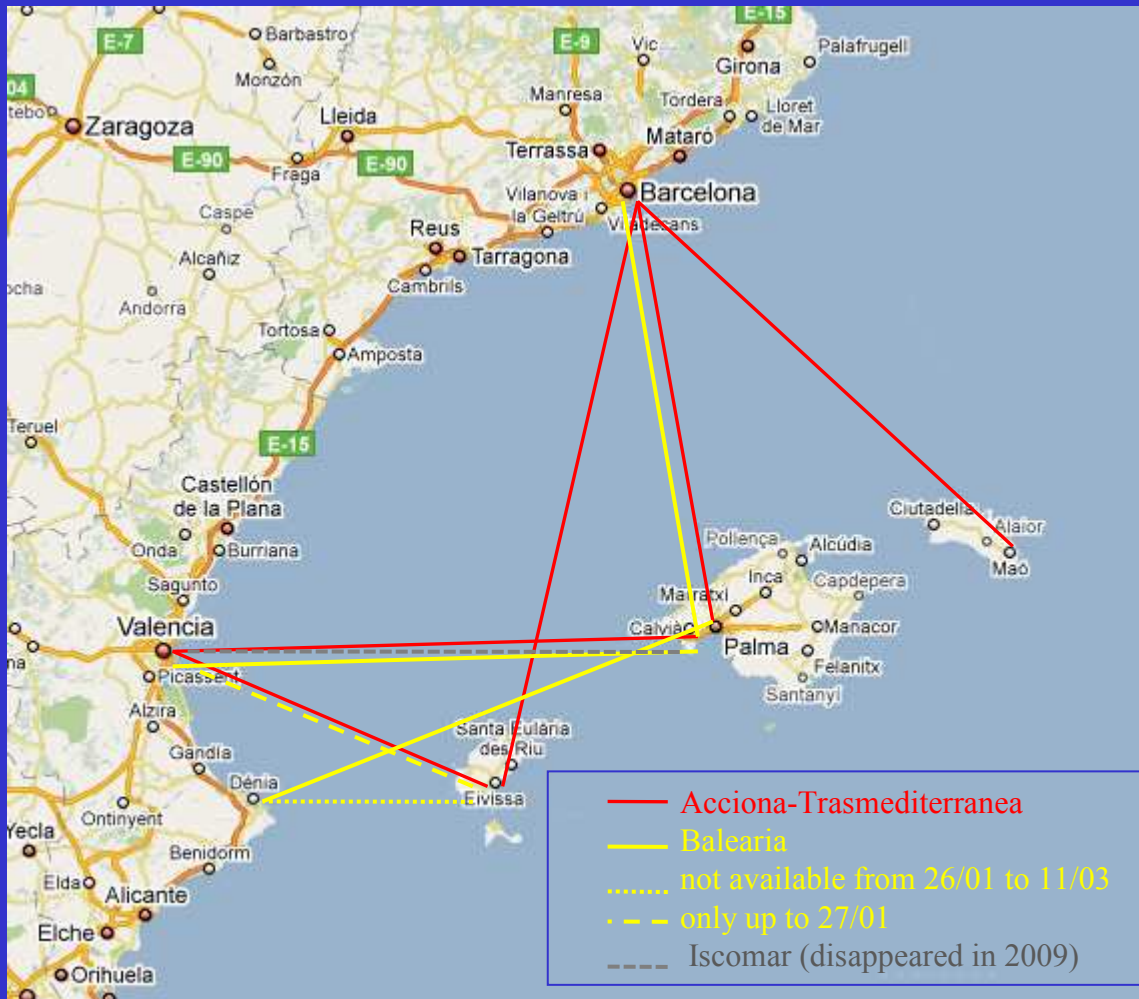
-More than 300 links/week.
- 5 operators

2. Transport island-mainland



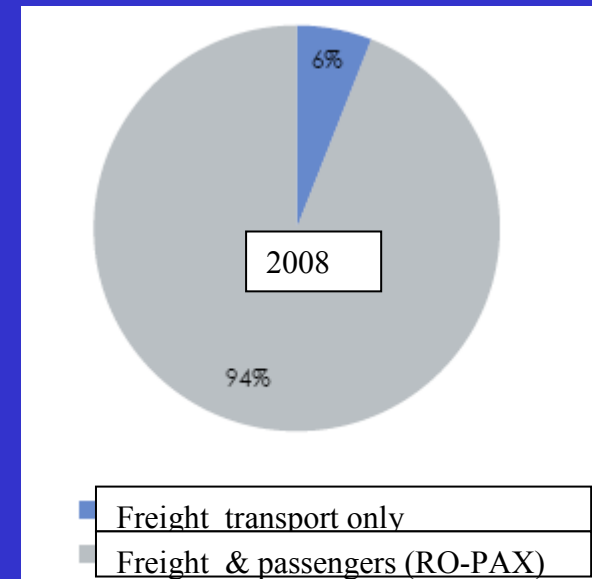
-More than 140 links/week.
- 2 operators

LINES OPERATING WITH THE MAINLAND



- RO-PAX

- 150*25m (average ship).





VESSEL TYPES: inter-island maritime transport

RO-PAX



Ferry (180 pax)



Ferry (310 pax)



Ferry (310 pax)



VESSEL TYPES: island-mainland maritime transport



THE CURRENT LEGAL FRAMEWORK IN SPAIN

1. Law 27/1992 of November 24, on Governmental Ports and the Merchant Marine.
2. R.D. 1516/2007 of November 16, on maritime cabotaje (regular lines) and navigation of public interest.

Public interest lines
(R.D. 1516/2007)

Barcelona - Palma de Mallorca
Valencia - Palma de Mallorca
Denia - Palma de Mallorca
Barcelona - Ibiza
Valencia - Ibiza
Denia - Ibiza
Barcelona - Mahón
Valencia - Mahón

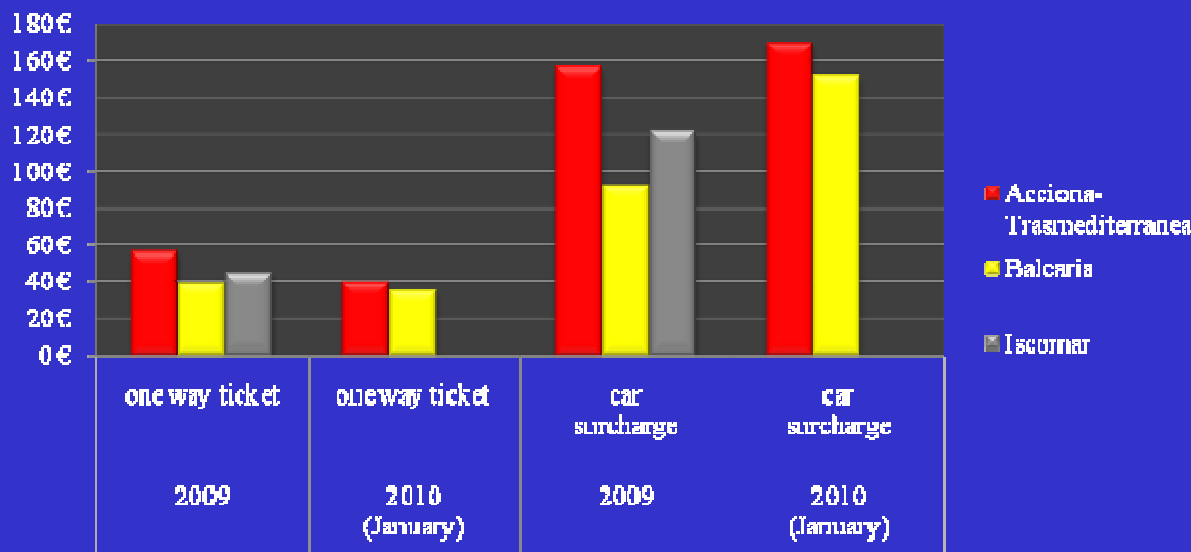
3 times
weekly
service
(min.)

THE PRICE FACTOR IN THE BALEARIC ISLANDS (I); price evolution after the disappearance of the third operator. A real example, the line Valencia-Palma.

Line operator	2009	2010 (January)	2009	2010 (January)
	one way ticket	one way ticket	car surcharge	car surcharge
Acciona-Trasmediterranea	57 €	39,75 €	157 €	169,60 €
Balearia	39,50 €	35,20 €	92 €	152,00 €
Iscomar	45,00 €	-	122 €	-

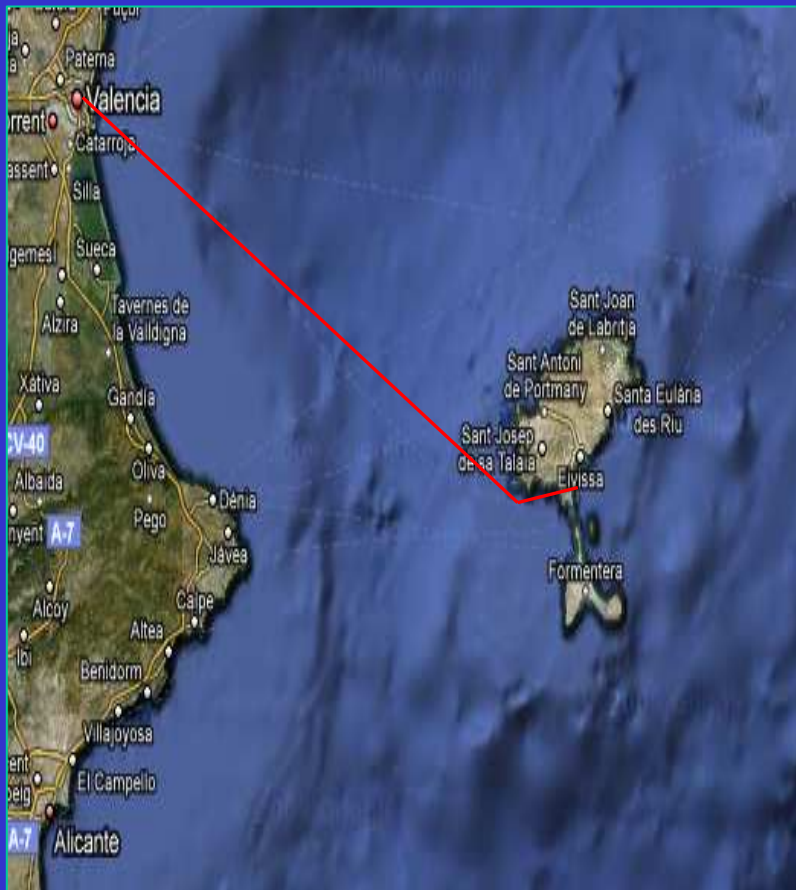
Significant data:

- Balearia has increased the price a **42,36%** after the third operator disappearance (*)
- Despite the economic crisis, cabotage between the islands and Valencia has raised in a 4,4%



(*) 1 passenger + car, total ticket price.

THE PRICE FACTOR IN THE BALEARIC ISLANDS (II); the line Ibiza-Valencia.



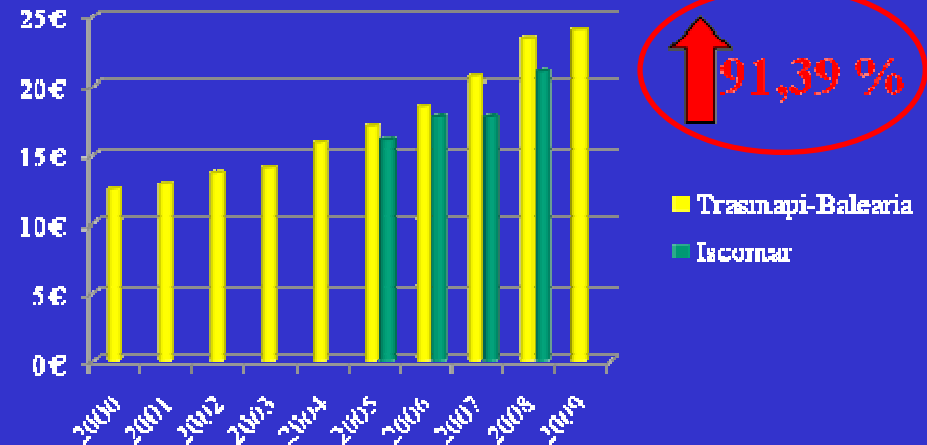
	2008	2010	% increase
1 passenger+car(*)	192,50 €	285 €	48%
2 passenger+car(*)	122,34 €	290 €	136,70%
2 passenger+car (one way)	182,32€	203,5€	12%

(*) especial offer booking at least 45 days in advance.

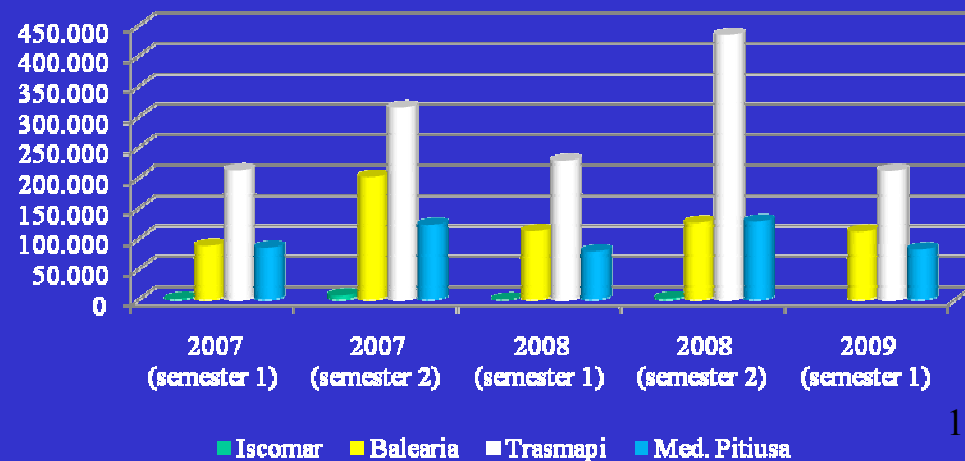
THE PRICE FACTOR IN THE BALEARIC ISLANDS (III); Formentera, a case study.



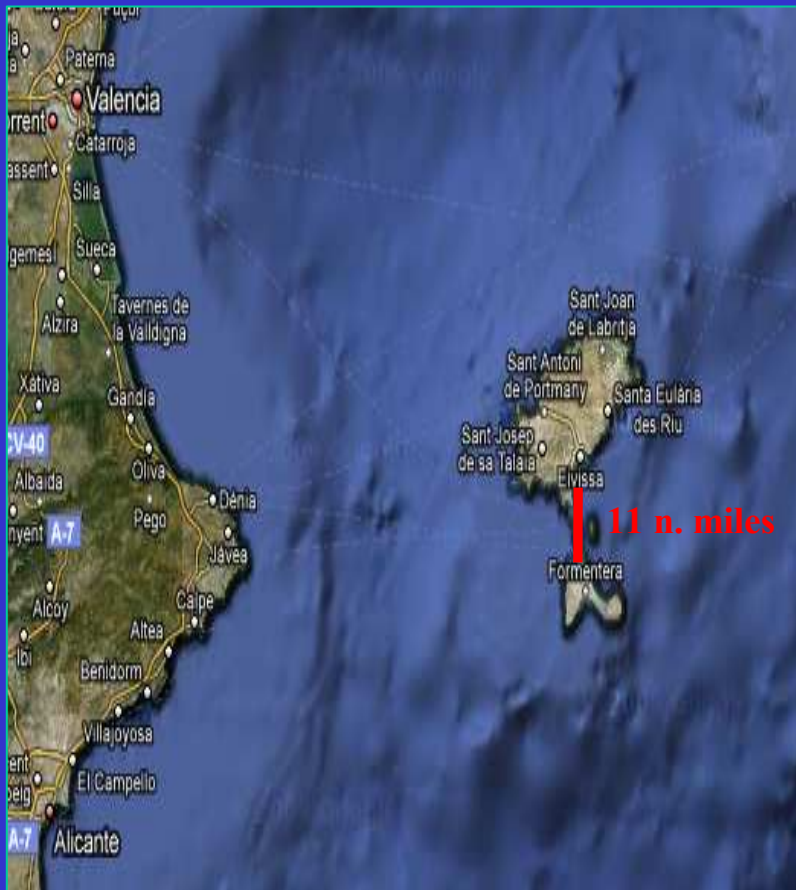
Price evolution 2000 - 2009



Passengers- Line Operators



PUBLIC SERVICE CONTRACTS (Council Regulation 3577/92)



1. There is significant traffic throughout the year.

2. ¿Is there effective competition between carriers?

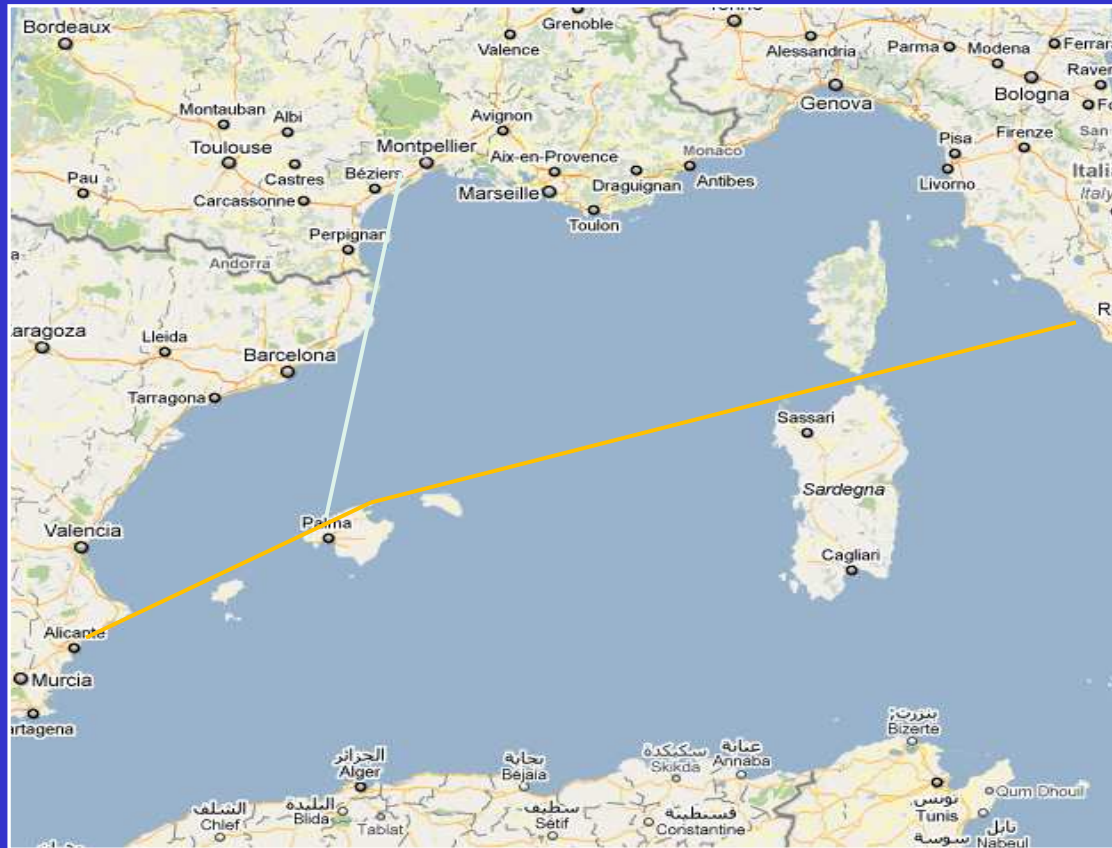
3. When the “laissez faire, laissez passer” approach does not work.

SHORT SEA SHIPPING & MOTORWAYS OF THE SEA; the difficulty of setting up new maritime links.

NEW LINES IN 2010?

1. ALICANTE- MALLORCA
CIVITAVECCHIA.

2. MALLORCA- SÈTE



INTERNATIONAL MARITIME ROUTES. ¿WHY ARE THE ISLANDS “BY PASSED” BY OPERATORS?

1. Measures to promote MOS; are they really effective?

2. Looking for an effective competition; Does the information arrive to the operators & entrepreneurs?

THE FUTURE LEGAL FRAMEWORK IN THE BALEARIC ISLANDS

The law on maritime transport in the Balearic Islands. Main features:

- 1.** Regulation of maritime transport between the islands (exclusively).
- 2.** Defines and establishes the legal authority to control, inspect and impose civil penalties that the regional Government needs to act.
- 3.** Introduction of rules about rights and duties of passengers following the model of air transport passengers rights (Regulation 261/2004).
- 4.** Protection of the maritime ecosystem.



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Gracias por su atención
Thank you for your attention!

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