A large cruise ship is docked in the foreground, its white hull and blue accents visible. The ship's name, 'SILJA SEINE', is partially visible on its side. In the background, the Helsinki Cathedral, a white neoclassical building with a prominent green dome, stands on a hill overlooking the water. The sky is clear and blue. The text 'ESPO CODE OF GOOD PRACTICES FOR CRUISE AND FERRY PORTS' is overlaid in white on the right side of the image.

ESPO CODE OF GOOD PRACTICES FOR CRUISE AND FERRY PORTS

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The Cruise and Ferry Port Network

Next to the 3.8 billion tonnes of goods that European ports handle every year, there are more than 400 million people, both ferry and cruise passengers passing through European ports. That is why, in 2010, ESPO decided to create a passenger committee dedicated to look at policy initiatives that are of interest to European cruise and ferry ports.

Given the quickly growing cruise business and the increasing number of European ports welcoming cruise ships, ESPO decided to strengthen the passenger network. On 17 September 2014, ESPO signed a strategic cooperation agreement with different organisations representing cruise ports: Cruise Baltic, Cruise Europe, Cruise Norway, MedCruise and Cruise Britain, who joined a few months later.

The aim of the agreement is to establish ESPO as the official voice of the cruise and ferry port authorities when dealing with the EU institutions. Moreover, the Network should be seen as a platform where knowledge and expertise among port professionals is brought together and shared in view of improving the performance of cruise and ferry ports.

The Network that resulted from this agreement meets on a regular basis.

This Code of Practice should be seen as a first bottom-up initiative developed by the Network.

Foreword

*By Santiago Garcia-Milà,
Chairman of ESPO*

Each year, more than 400 million passengers are embarking or disembarking in European ports. Many people pass through a port to go to work, to meet their families and friends or to connect with the “continent” mainland. For many others, the port means the start of a holiday, the arrival at and discovery of a nice destination, an essential part of their travelling experience.

It goes without saying that port authorities cannot merely focus on the cargo that is passing through their port.

For a long time, ESPO has been working almost exclusively on freight issues. This changed in 2010 when ESPO decided to create a passenger committee. Within this committee the first steps were set to bring together European port authorities that are active in the cruise and ferry sector.

With the creation of the Cruise and Ferry Port Network in September 2014, ESPO has stepped up its efforts to voice the interests of the cruise and ferry port authorities in Europe. But there is more. By bringing together ESPO's passenger committee and the different regional Cruise ports organisations in one network, ESPO is gathering active port professionals and their associations in view of finding ways to respond in a constructive manner to the common challenges that cruise and ferry ports are facing. Together they aim at improving the quality of their work in a proactive way.

I am delighted to present this Code of Good Practice for Cruise and Ferry Ports, which is a first realisation of the Network. It should be seen as a motivation for ports that are already applying these good practices, to continue their efforts. It will inspire others to perform better. It should also be seen as a living document. Practical examples on our website will illustrate the many practices described in this code.

I am grateful to the ESPO members who are actively working on passenger issues and to all the cruise organisations involved, Cruise Baltic, Cruise Britain, Cruise Europe, MedCruise, and Cruise Norway for all their efforts and contributions in drawing up this code. Many thanks also to the secretariat for their editorial work.

Ports in Europe are very diverse, but they are all part of a network. Certainly, in the cruise and ferry business, quality and performance in one port will only show themselves to best advantage if the connecting ports are making similar efforts. Let us continue to work together towards an even more successful cruise and ferry port business in Europe!

***By Stavros Hatzakos,
Chairman of the Cruise and Ferry Port Network***

It is a great privilege for me to be entrusted with the chairmanship of a committee for a second time, this time the Cruise and Ferry Port Network.

But it was also a great challenge to open this dialogue on behalf of ESPO, not only with our member ports, but also, for the first time, with all the different regional associations of cruise ports. All of these organisations have worked in a competent environment and have succeeded over the last years to implement all the rules and regulations for passengers in order to transform traditional ports into ferry or cruise ports and apply security measures in accordance with the ISPS Code. Doing so, ports have continuously been working on providing a safe and secure environment for passengers to travel for business or pleasure. This can give ideas for good practices to others to follow.

Through the setting up of the Network, gathering all the cruise port associations under one umbrella together with the ESPO members active on ferry and cruise business, ESPO has created a platform to discuss the various challenges that ports are facing. This platform will also help in demonstrating the contribution of the cruise and ferry port sector to the local and regional economy and tourism in Europe. This Code is a first approach and as it is a tradition within ESPO, we will continue with even more work on innovative ideas in the future.

I would also like to thank the European Commission who has definitely shown its interest in the cruise sector through the development of the Pan-European dialogue on Cruise in 2015. We hope we can further rely on their support. Furthermore, this Code should also be seen as a major step towards enhancing the cooperation within the cruise and ferry sector.

INTRODUCTION







Aim and Structure of the Code

In January 2015, a Passenger Port Review was launched within the European Cruise and Ferry Port Network. The review mainly aimed at identifying the key challenges European cruise and ferry ports are facing. In total, 119 cruise and ferry ports situated in 24 different European countries completed the survey. ESPO drafted a series of nineteen different challenges, of which the ports were asked to select the five most important ones for their port. On the basis of the outcome of this exercise, ESPO identified the five main challenges for cruise and ferry port authorities in Europe: the port-city relationship, infrastructure, cooperation, relation with the cruise and ferry lines and security.

Subsequently, on the basis of these challenges, five thematic working groups were established, containing representatives of port authorities and associations from all over Europe. In each working group both the ferry and the cruise port sector were represented. The working groups each drafted a paper on their respective challenge. The ESPO secretariat then compiled and edited those contributions which ultimately led to this Code of Practice.

AIM

This code has the following aims:

- **Define the common challenges** the cruise and ferry sector is facing;
- **Identify good practices** to respond to each of those challenges;
- **Share these good practices** with all stakeholders involved in the cruise and ferry sector;
- **Inform policy makers and the wider public** about the characteristics, challenges and bottom-up initiatives taken by European port authorities to face the main challenges;
- **Strengthen the network** of European cruise and ferry port authorities in view of enhancing their performance and voice.

STRUCTURE

The structure of the code follows the five main challenges identified on the basis of the Passenger Port Review. The good practices and recommendations made in this code have to be seen with the inventory of good examples and practices featuring on the ESPO website. This inventory will be updated continuously and will turn the code into a living document.



Main Characteristics of the Sector

IMPORTANCE OF THE SECTOR: BEYOND THE STATISTICS

In 2014, the total number of passengers embarking and disembarking in EU ports was estimated at 402 million.

The overall majority of passengers are **ferry passengers**. Eurostat estimates the total number of passengers embarking and disembarking in EU ferry ports to be 390 million.¹

It is to be noted however that, as concerns **cruise passengers**, the Eurostat figures might be slightly misleading from a port's perspective. The cruise passengers featuring in the Eurostat statistics refer to the amount of cruise tourists embarking and disembarking each year on a cruise at a turnaround port. The passengers embarking and disembarking at the subsequent transit cruise ports are not represented in these statistics, even though they are creating income for the transit ports and added value for the city and region of the transit port.

If the statistics would count all passenger movements, or so called "port-of-call passenger visits", in the same way as cargo is counted in the ports, the actual numbers for cruise traffic in ports would be considerably higher. To give an indication, the cruise ports participating in the Cruise and Ferry Port Network register well over 45 million cruise passengers per year.

According to a study commissioned by the European Parliament on the **ferry sector**², ferry traffic in Europe is mainly situated in

the Baltic, the North Sea and Mediterranean regions. The Mediterranean region has the highest share of passenger volume, while the Baltic region shows the highest share of vehicles (i.e. cars, buses and trailers).

In relation to the total number of routes operated, all three regions have remained relatively stable over the last few years. In general, one must consider that the overall ferry business performance is in line with the economic situation of the region it serves.

The **cruise sector** in Europe is a vibrant industry. Since 1990, the cruise sector has known a continuous growth worldwide, even if growth has become less spectacular since 2013.

According to Cruise Lines International Association (CLIA)³, Italian ports are the market leaders in Europe when it comes to **cruise passenger embarkations**. The main Italian port destinations are Venice, Civitavecchia, Savona and Genoa. Spanish ports take the second position with Barcelona and Palma as the main embarkation ports. The United Kingdom comes third, with Southampton, Harwich and Dover as Britain's main embarkation ports.

Mediterranean countries account for the most **passenger visits**. Of all European countries, Italian ports have the most cruise passenger visits. The main destinations of those passenger visits are Civitavecchia, Venice and Naples. Spanish ports (including the Canary Islands) take the second place. Greece is to be considered as the third most popular destination in Europe, with Piraeus, Santorini, Mykonos, Corfu and Katakolon as the leading destination ports. The fourth and fifth largest destinations are situated in Norway and France. In 2014, Norway was the leading destination in Northern Europe and the fourth most popular destination in the whole of Europe. Bergen, Geirangerfjord, Oslo and Stavanger are the most popular destinations. France takes the fifth position with Marseille, the Côte d'Azur ports, Corsican ports and Le Havre as the most popular destinations.

The cruise industry in Europe is mainly destination-led. Cruise lines plan their routes in function of attractive tourist destinations. Consequently, the leading cruise ports in Europe are often regarded as "must-see" or "marquee" destinations. Other ports can become attractive because of their strategic position in an area or their easy access through well-connected airports.

1. As from 2016, ESPO will collect more detailed data on the number of cruise passengers (both home and transit) and ferry passengers in EU ports through the ESPO Rapid Exchange System. More information can be found on ESPO's website: <http://www.espo.be/fact-and-figures>

2. European Parliament, *Research for TRAN Committee – The EU Maritime Transport System: Focus on Ferries*, Policy Department B: Structural and Cohesion Policies, Brussels, 2016, pp. 18 – 19

3. Cruise Lines International Association (Europe), *The Cruise Industry: Contribution to the Economies of Europe*, 2015 Edition, pp. 6 – 12

CRUISE AND FERRY PORTS ARE CRUCIAL FOR EUROPEAN TOURISM

Coastal and maritime tourism is the largest maritime activity in Europe and employs almost 3.2 million people, generating a total of EUR 183 billion in Gross Value Added and representing over one third of the maritime economy.⁴ Maritime passenger traffic (cruise and ferry) is an important aspect of European tourism. A passenger ship spends money on port dues, handling fees, services and supplies but also brings in large groups of visitors to the area around the port and its cultural or historical attractions.

Ferry and cruise ports are however serving very different needs. Ferry traffic is a crucial aspect of tourism in many countries. Ferry ports are the gates — sometimes even the only — to many touristic islands. The ferry tourist's main goal is to reach the destination as quickly as possible. Holidays are becoming shorter and cheaper and there is not enough time (and money) to prolong the passenger stay in the port. Ferry lines are trying to make the voyage more comfortable and the quality of the ships is increasing with the aim of increasing onboard spend. Ferry ports must offer the smoothest and cheapest way to embark (or disembark) and must have smooth connections with the highway. There are many ports in competition for ferry business and logistics is the key to beating the competition. Cruise tourism has a significant impact on the European economy. According to CLIA, in 2014, 31% of the global cruise vessels capacity was deployed in European destinations. Cruise passengers (and crew) spent EUR 3.64 billion in 2014, including spending for shore excursions, pre- and post-cruise hotel stays, air travel and other merchandise at ports of embarkation and ports-of-call. CLIA figures also advocate that cruise passengers spent an average of EUR 81 at embarkation port cities and spent another EUR 62 at each port visit on their cruise itinerary.

4. ec.europa.eu/maritimeaffairs/policy/coastal_tourism/index_en.htm

REPEATERS VALUE

Repeat business in the cruise industry is particularly high. In Norway for example, an estimated 17% of cruise passengers visited once again the region which they had previously visited on their cruise voyage.⁵ Ferry can also have a repeaters value, when passengers passing through a port city on the way to their planned destination may discover a “next holiday destination”.

5. www.toi.no/getfile.php?mmfileid=23584



FERRY TRAFFIC IS A MULTITASKER

The ferry industry accommodates a high variety of traffic. Freight vehicles will be loaded on the same ships as individual passenger vehicles and coaches. The diversity of the passengers obliges ports to diversify the conditions of accommodation and services on vessels. The regulations applying to the access and control of the freight vehicles will differ from the regulations for individual passenger vehicles and coaches. The segregation implies complexity in the access process and flexibility of the authorities to ensure port fluidity and a standard quality of service.

In addition, some ferries are showing more and more characteristics of a cruise ship. These ferries, also called 'mini cruises', include an overnight stay and put more emphasis on leisure and comfort rather than profiling themselves as a functional way of transportation.

FERRY LINES AS FACTOR OF INTEGRATION

In some cases, ferry connections are real life lines connecting remote areas and islands to the mainland and the economic and industrial growth areas. As ferries provide low cost crossings for both goods and passengers and offer occasions to cross the intra-European borders, they can be considered as an important contributor to European cohesion and integration.

'CARGO DOESN'T TALK, PASSENGERS DO'

End consumers of goods have probably never visited the port through which their goods are being imported. This is different for cruise and ferry passengers who are in fact experiencing the port. Therefore, the ferry and cruise port is (be it indirectly) much more into a business to consumer relationship, whereas the freight port is more into a business to business relationship with their users. Both the human element and the right "look and feel" of the port play a much bigger role in cruise and ferry ports than in freight handling ports. Passenger satisfaction is paramount and will influence cruise and ferry line loyalty.

THE SUCCESS OF A PORT OFTEN DEPENDS ON EXTERNAL FACTORS

Even if cruise tourism is a growing sector, cruise business should never be taken for granted. Cruise port business is often affected by factors that are out of the influence of the port authority. Cruise ships are the ultimate moveable asset. Despite huge developments in port facilities, the destination remains the prime driver in the cruise passenger's buying decision. Equally, a changing geopolitical situation can highly impact the cruise port business. Cruise passengers are looking for a relaxing holiday. Any event or circumstance that might spoil that dream picture is to be avoided.

Ferry business can also be seriously affected by external factors. The performance of the ferry industry has over the last couple of decades been influenced by the abolition of the duty free regime, the competition of low-cost flights and the introduction of fixed links (such as the Channel Tunnel between the UK and France or the Oresund link between Denmark and Sweden).⁶

NEWCOMERS

If certain ports have been active in the passenger sector for a long time, other ports have only recently become focused on the passenger market and see it as a new challenge. This is the case for some ferry ports but is certainly the case for cruise ports. Some important freight ports have turned into important cruise ports over the last years. The port authority then faces the challenge of meeting the often very different demands of the passenger and freight market segment.

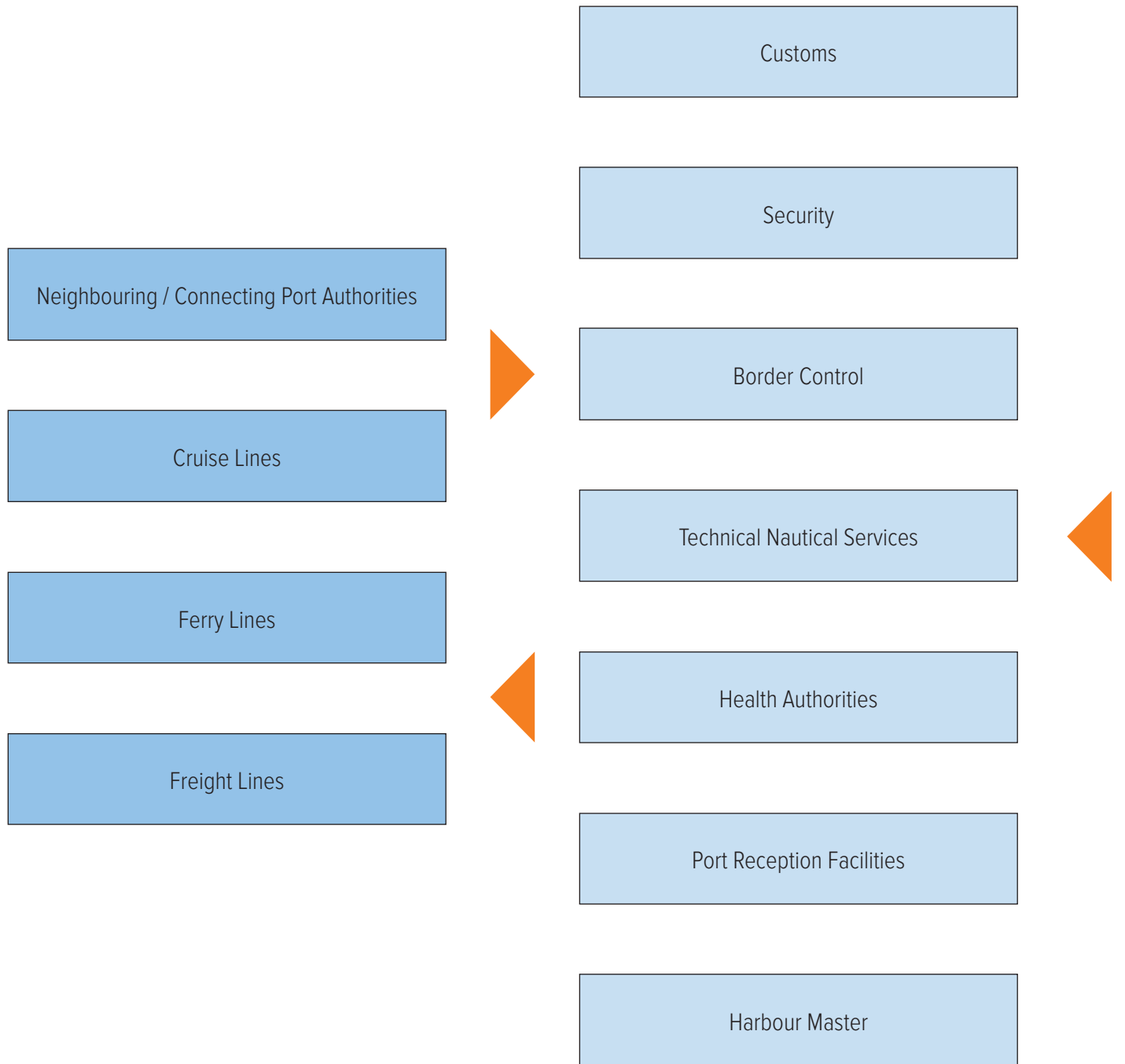
SEASONALITY

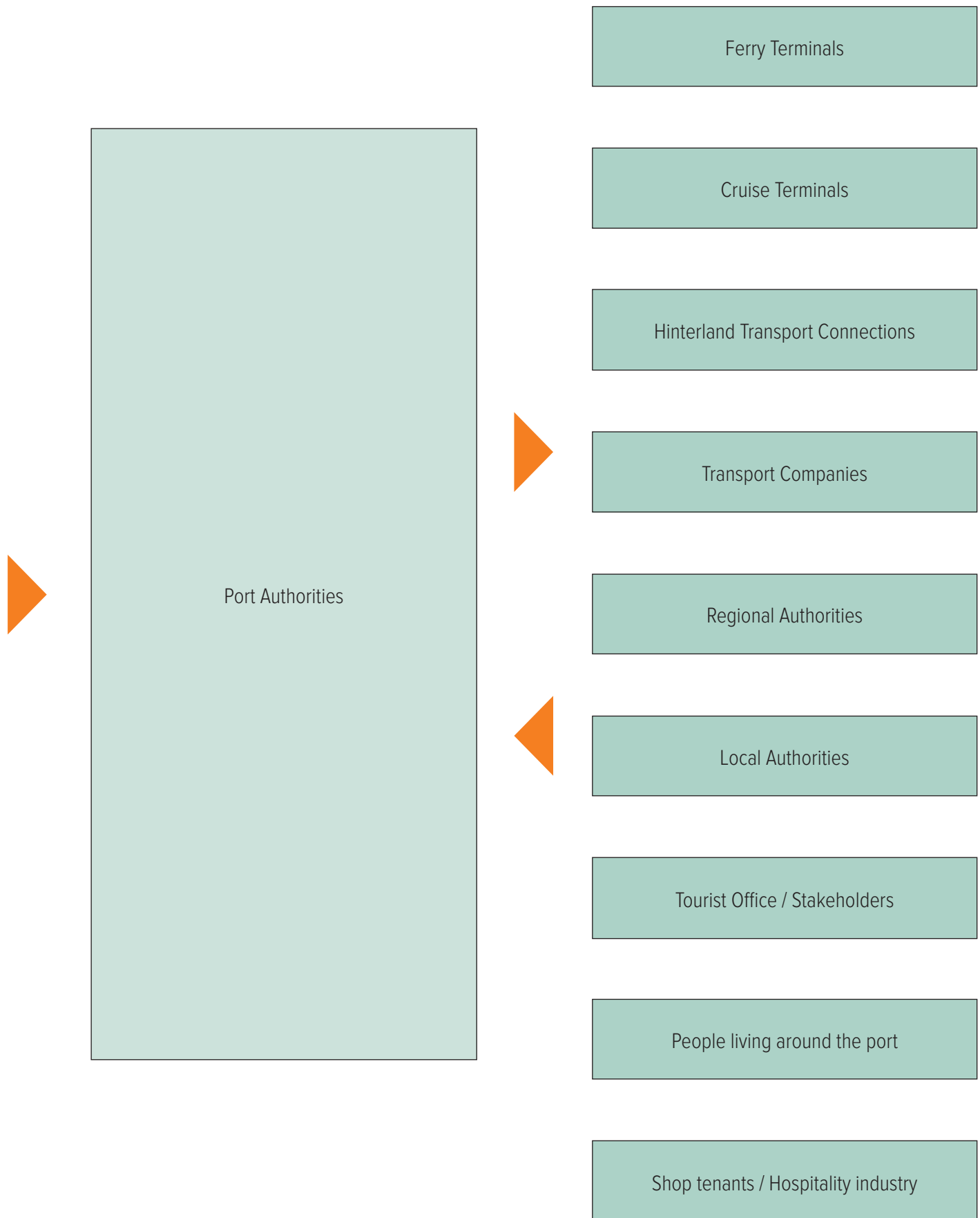
The seasonal character of the cruise and ferry business largely depends upon the geographical location and the weather trends. The north of Europe will be more affected by the seasons than the south. The weather will affect ferry traffic to a lesser extent, but in certain areas, ferry traffic can suffer delays or even disruption in extreme weather conditions.

In any case, holiday season will see the cruise and ferry business peaking. This seasonality means a challenge in terms of infrastructure, service, and pressure for the people living around the port and for businesses depending on the port activity.

6. European Parliament, *Research for TRAN Committee – The EU Maritime Transport System: Focus on Ferries*, Policy Department B: Structural and Cohesion Policies, Brussels, 2016, p. 18

The Players





THE CODE OF GOOD PRACTICES







Port-City Relationship

Bridging the gap

The majority of ports in Europe are urban ports. They are nestled in or very near urban and densely populated agglomerations. Shipping being historically one of the first ways to transport goods, cities have traditionally developed themselves around the port area. Port activity was an integral part of life in and around the town. For the last decades, because of the serious scale increase and the subsequently more sophisticated port infrastructure, freight port activity has moved out —and in some cases has been pushed out of the town. At the same time, European security measures developed in the aftermath of the 9/11 attacks have created an additional psychological distance between the port and the city. Moreover, over the last years, inhabitants have rediscovered waterfronts. These have evolved towards trendy areas where fancy lofts, expensive office buildings, recreational areas, bars and restaurants are struggling to be on the waterfront.

Cruise and ferry port activity is often the only port activity that has remained close to the city and that can be experienced by the port citizens. These activities allow ports to have visibility in the city and to maintain a certain awareness of what it means to be a port town. At the same time, the proximity of the city and of people living around has obliged the port to work even more on reducing externalities of the cruise and ferry port activity.

Moreover, in many cases, the ferry or cruise vessel is arriving in a port city which is not the final destination of the cruise and ferry passenger. This can leave the port of arrival city with the externalities, whereas the main economic benefits are perceived as going to the must-see attraction and/or city. Finally, the cruise and ferry activity being often a seasonal activity, peak season can be experienced as a burden for the people surrounding the port.

Bridging the gap between the port and the city will be one of the main challenges for cruise and ferry ports. This can be achieved by enhancing the mutual understanding between them, by raising awareness about the added value and economic impact of the port activity, by addressing the externalities linked to cruise and ferry port activity and by managing the possible congestion that can occur in peak season.



ENHANCE THE MUTUAL UNDERSTANDING BETWEEN PORT AND CITY

Help the Local Population understand the Cruise and Ferry Business

As cruise and ferry ships mainly arrive near or into urban agglomerations, a good relationship between the port and the local authorities, stakeholders and population is paramount. However, local opinion is not necessarily always on the side of the port in relation to its cruise and ferry business. The passenger experience is always different from the inhabitant's experience and local authorities might lack good understanding of the needs and added value of the cruise and ferry business.

To face this reality, it is important to provide the local community and also the wider region with **good and trustable information** about the benefits and added value of cruise and ferry business. It is for instance important to indicate that cruise holidays are often used as a way to sample destinations that the cruise passenger may wish to visit on another occasion again from the landside.

The added value and potential of cruise and ferry business can be demonstrated at general level, through the regional, national or international organisations representing the business. The economic impact of cruise or ferry tourism for the city can also be assessed at the level of the individual port, if the resources for commissioning such an impact study are available.

Moreover, it is important that this information reaches the local population and the region. Forums, local cruise networks or the publication of a newsletter can remedy possible existing information gaps. To reach the local population, it is also important to raise the awareness among **local authorities and local media**.

Integrating the cruise and ferry port business in conferences, television programmes, research and university thesis, school projects, etc. will also contribute to understand the added value and potential of the sector. Another way for cruise and ferry ports to connect with the city is the **use of innovative technologies to share day-to-day information** with residents and stakeholders about incoming large cruises, traffic jams around the ferry port, etc.

BRING THE CITY INTO THE PORT AND THE PORT INTO THE CITY

One of the ways to close the gap between the city on the one hand and the port on the other hand is to bring them closer to each other through information and active engagement.

Creation of a Tourist Information Point/Area in the Port

In different ports, a city tourist information point has been created in the passenger terminal of the port. The municipality and the port or passenger terminal can share the costs of this tourist information point, which would ensure a coordinated and managed approach to specialised tourism initiatives for passengers. The service can be entrusted to a tour operator through a city tender. By doing so, the city can easily promote its touristic assets and those of the region. The cruise and ferry passengers can easily get information and book excursions which will enhance the added value for the local community and economy. In some cases, the tourist information area in the port could also be selling official local products, which contributes in making the town or region globally known.

Interact with the local Population, Business and other Tourists

A positive way of bringing city and port closer to each other is to gather both "worlds" around one activity. Some cities are in this respect organising events such as fireworks, street theatre, live music or a welcome party at an important cruise call (e.g. inaugural call of a ship). These events are advertised and shared with the local community and population via local press and social media.

Actively engage the Local Population in the Cruise and Ferry Business

Prior to each season, the cruise port can organise a residents meeting where an overview of the forthcoming cruise season is given along with opportunities for engagement for local performers, choirs, schools to be involved in some way in the cruise operation.

Open up the Cruise and Ferry Infrastructure/Terminal for the Local Population

During low season, a cruise terminal — and to a lesser extent a ferry terminal — can be used for hosting a local event. In some cases, the port is even housing a multipurpose centre, that can be used in a flexible way for different activities (conference room, space for exhibitions and educational activities combined with spaces for services to passengers). This will bring the local community to the port area, help citizens live in some way the passenger experience and make them discover the docks.

EDUCATE STAKEHOLDERS AND PASSENGERS

The support of the local community is paramount for the ferry and especially the cruise business. Being considered as 'people friendly' port city is one of the elements making a destination successful. Training of local stakeholders explaining them the visitor's profile and even assisting them in the knowledge of languages are good ways to improve the image of the local population.

At the same time, cruise and ferry lines should be encouraged to take social responsibility and enhance local employment opportunities. This can concretely be done through sponsoring of education programmes or cooperation with local higher education.

Port authorities could also take initiatives to inform cruise lines about the possible sensitivities and/or habits of the local community or region. This must allow the cruise lines to inform their passengers about these good-to-know things about the place of destination and its inhabitants. Overall, cruise lines should also encourage their passengers to be considerate and sympathetic to the local population.



Cruise Baltic is very proud of the cooperation between the European cruise associations and ferry ports, who are able to produce a practical piece of work such as this Code. At Cruise Baltic, we see several emerging cruise markets, and it is imperative that the well-established European cruise destinations work together in order to maintain their significant share in the cruise business. When looking at the Baltic Sea, we are expecting increased cruise tourism, and due to the future regulations, we will probably have the greenest cruises on earth. Our vision of “Creating the World’s Greatest Cruise Experience” has come closer.

Mikkel AAROE-HANSEN,
Chairman Cruise Baltic

WORK ON THE SUSTAINABILITY OF THE CRUISE AND FERRY PORT ACTIVITY

Since 1996, ESPO has been monitoring the environmental priorities of European port authorities. Relationship with the local community features as a number 4 environmental priority in the new Top 10 released in March 2016⁷. One of the main challenges for ports in their relation with the local community is to make sure cruise and ferry operations in ports remain as sustainable as possible. As cruise and ferry ports are often situated in the immediate vicinity of cities, their operations can cause a number of congestion, pollution and other environmental issues. It is important that the local community is aware that the port authority recognises and copes with these issues.

Measure and monitor the Externalities

First of all, port authorities can play an important role in monitoring the environmental impact their cruise and ferry operations generate. Information is key, since adequate and pertinent information allows port authorities and other stakeholders like national/regional/local authorities or shipping lines to take the steps required to lower the environmental impact of cruise and ferry business.

Different port authorities have developed mechanisms for monitoring the impact of cruise and ferry port activity in terms of air pollution, noise, waste collection and treatment, nuisance and/or performance related to cruise or ferry hinterland traffic by road. The monitoring can also allow for an early warning whenever the parameters set by law are exceeded. The monitoring can be done in-house if it is performed in a transparent manner. Appointing an independent body or agency to perform this monitoring could of course increase the value of exercise. Sharing the outcome of the monitoring exercise with the local community will also show willingness from the port industry to cope with it.

7. www.espo.be/fact-and-figures

Reduce Externalities

Port authorities can also incentivise shipping lines to use less polluting ships by introducing reduced port dues for greener vessels. The Environmental Ship Index (ESI) and Green Award are two existing schemes that are increasingly used by port authorities in that respect.

Port authorities should also be encouraged to provide shore side electricity where possible in order to reduce the emissions of cruise and ferry ships at berth.

Greening the hinterland connections from and to the ferry and cruise port can certainly positively impact on the externalities. Ports can explore sustainable ways of ensuring the transport between the port and the city and/or touristic attractions.

Waste is a huge challenge for cruise port authorities and cruise lines. Even if the European legal framework in place ensures the provision of adequate facilities for waste reception in the port, the segregation of different waste streams often depends of the provisions available at local level and the waste treatment policy of the given region and/or member state. Furthermore, the interpretation of waste legislation in certain Member States poses challenges. Developing a management plan for waste produced by the ferry and cruise sector in cooperation with all stakeholders involved can enhance the environmental performance of waste management.

Port authorities can also explore ways and encourage port operators to lower **energy consumption** in the port and/or increase the energy efficiency in the port (on reducing externalities, see also the chapter on page 27).

MANAGE THE CONGESTION AND PRESSURE ON INFRASTRUCTURE AND SERVICES

High season can be a challenge with regard to ship congestion in certain marquee ports with numerous cruise lines, all demanding to be priority within an already busy destination with conflicting demands from ferry traffic, domestic tourism, mainstream tourism etc.

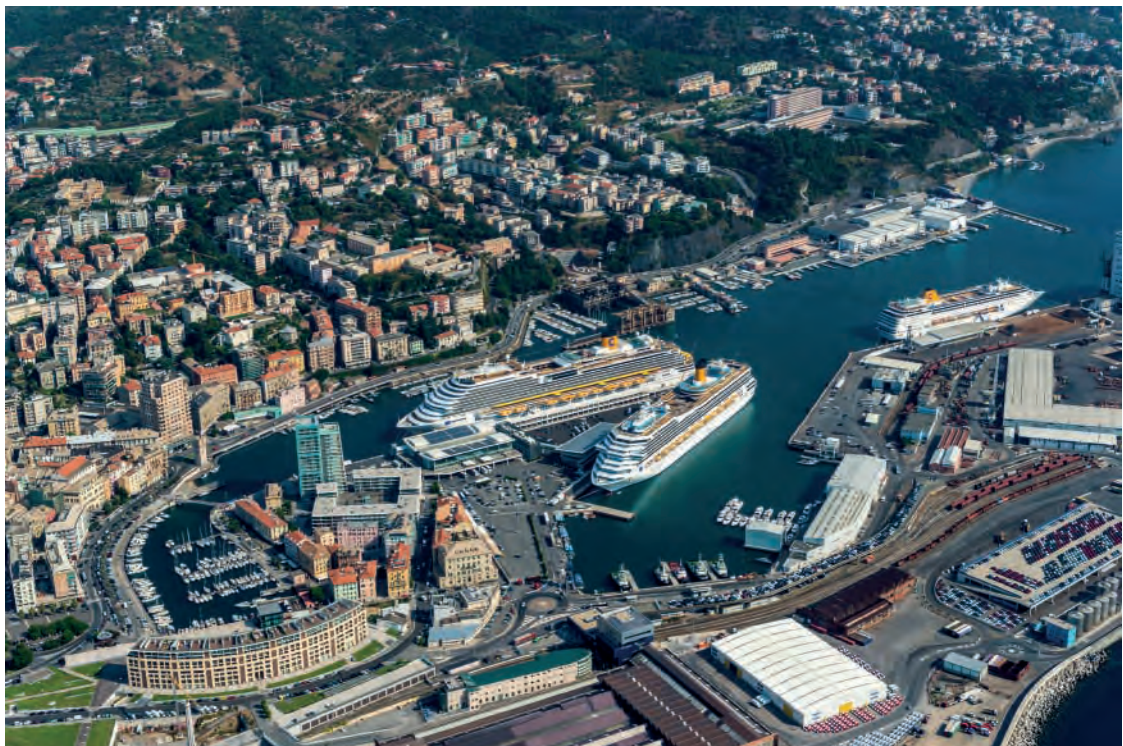
Each port should **develop a strategy** to ensure booking levels are managed to avoid congestion wherever possible, which may involve working together with neighbouring ports. This can only assist in ensuring the passenger experience is a positive one within that particular port or region, ultimately leading to repeat business.

Tourism saturation is particularly a problem in smaller cruise destinations, whereby the port and city can, on occasion, struggle to cope with the demand on their infrastructure, attractions and transport. A solution to this situation could involve each destination to work within their own **cruise forum** to identify possible solutions, management systems, rotas etc. that could help to ease the coming and going of thousands of passengers.

In addition, **incentives on a regional/country basis to promote lesser visited ports or cities could offer some resolution.** It is important though that these lesser visited ports or lesser visited cities make a realistic assessment of the tourists' needs and expectations. They should not try to become another "must-see", but could work with the cruise and ferry lines on identifying small, tailor-made, "off the road" attractions (e.g. visiting a local farm, wine tasting, etc.) that can be attractive for tourists, who want to avoid the big and crowded tourist attractions. This can result in an overall more diversified offer for the tourists and will counteract tourism saturation of certain destinations.

Adapting the infrastructure in and around the port could avoid that people around the port suffer from the effects of the peak season without being part of the benefits. Relocating the passenger car parking in order to avoid passengers having to go through the city centre and/or having a dedicated road for connecting the port with the highway are examples that have proven to be fruitful in terms of ensuring smooth connections without hindering local road traffic.

Real-time information around the port on traffic jams, arrivals of ferry and cruise ships could help local citizens for choosing alternative routes and thus avoiding nuisance.





Infrastructure

*Impress
the passengers*

Ports in Europe need to invest in new infrastructure for different reasons. They have to respond to the demand for more capacity and to the increasing size of ships. They must develop infrastructure to meet new environmental requirements and to prepare for the energy transition. They have to maintain and, if needed, upgrade the existing security infrastructure and they are obliged to optimise and green their hinterland connections. All these investment needs characterise both freight and passenger ports.

Cruise or ferry ports are facing an additional challenge. When debarking in a port, the passenger sets its first steps in a certain region or country. The port is in that respect the first “face” of a country or a region. As a consequence, ports will have to work on a nice “look and feel”, so as to show passengers they are welcome and arriving at a nice destination.

Looking at the specific infrastructure needs for cruise ports, one has to distinguish between turnaround and transit ports, the latest being less demanding.

The minimum requirements for cruise transit port infrastructure are depth, appropriate quay length, wide apron for handling passengers, ISPS rules implementation, immigration and customs. Close vicinity or a high-quality connection to the local tourist attractions are essential. A good temporary anchorage in vicinity of touristic attraction can be sufficient for a cruise transit port.

Cruise turnaround port infrastructure is more demanding and requires good connection with the arrival/departure point of passengers (airport/railway station/bus station). Especially for airports, a vast amount of international connections is needed to allow passengers from all over the world to easily reach the departure port of their cruise. Furthermore, in the case of turnaround operations, vast parking areas near the cruise passenger terminals are essential.

Also for **ferry ports**, the investment needs and the public support for those will to a large extent depend on the role a given port is playing. In case the traffic at a destination port is a balanced mix of passengers and road haulage, the impact on the local economic activity can be maximised by generating both tourism-driven and logistics activities. The integration with the area surrounding the port can be equally profitable by developing a local industry supportive to the port’s development.

Transit ferry ports will face more difficulties to generate leverage and may get less support from the population and authorities in their strategic planning.

Infrastructure and service needs will finally be different if the ferry port offers short or long routes. When offering short routes, the main aim is to optimise the number of crossings. In that case, the time spent in the port is considered a waste of time and money.

DRESS UP YOUR PORT TO IMPRESS

Unlike freight ports, ferry and cruise ports are welcoming people and where freight cannot speak, people can.

The cruise or ferry port is for many passengers the start of a holiday. A port gives cruise passengers and ferry tourists a first impression of the country or region they are going to visit or at least pass to get to their final destination. Even if ports are in principle “just an interface” between land and sea, they can play an important role in attracting tourists and in meeting passenger’s holiday expectations.

It is therefore important to show passengers they are welcome. Signposts saying “welcome” can literally make the difference. Adequate travel and touristic information (maps, light panels, leaflets, etc.) in the port will also give passengers the feeling they are expected.

Ports can also advertise their port or even share some history of their port with their passengers. This can be done by reserving some exhibition space in the port or by just having some information about the port in the passenger’s area.

Bearing in mind that a first impression counts, ports can even go one step further. They can try to “impress” the passengers and really make the port experience part of the holiday. Special attention can be paid to give a nice design to the entrance and/or pre-boarding area.

Even in smaller ports, small measures can be taken (covered and/or air-conditioned areas to protect from sun or rain, availability of toilets, etc.) to make it more comfortable for passengers, while they are waiting for security checks or customs. An optimal port area planning can also avoid that passengers are walking through cargo areas or less nice areas of the port.

Adequate infrastructure to allow to perform security checks in the best way possible is essential in creating a positive image of a port.

MATCH THE LONG-TERM NATURE OF PLANNING PORT INFRASTRUCTURE WITH THE QUICKLY CHANGING MARKET NEEDS

Investments in port infrastructure can be very costly and are susceptible to a number of risks. The expansion of the cruise fleet, the ever increasing size of cruise ships and the growing number of passengers imply that ports need both to improve the use of existing port infrastructure and to construct new infrastructure. However, this does not mean that cruise infrastructure will pay off automatically. Tourism is vulnerable to various socio-political and geo-political events, which could gravely impact the amount of passengers visiting a certain destination. Furthermore, as tourist preferences change over time, cruise lines might alter their routes suddenly, leaving the ports with less cruise berthing and passengers embarking/disembarking and consequently less income. This is a challenging situation since investing in cruise port infrastructure has a very long return on investment which is intrinsically linked to the exploitation rate of the infrastructure. Ports should definitely take these risks into account and prepare for the worst when making their business cases for the intended infrastructure investments.

Moreover, decisions to build port infrastructure are often subject to wide and time-consuming analyses and discussions between many stakeholders (including politicians, local population, civil society, border control, customs, etc.). This process can sometimes take decades. The time-consuming nature of the planning and permitting procedures for port infrastructure often conflicts with the decision of cruise and ferry lines to build new and bigger ships. These are strategic market driven decisions and are, compared to the investment decisions in a port, decided in a much shorter timeframe.

Setting up a dialogue between port and shipping lines can help streamlining investments and timing and thus avoid this mismatch between the long-term vision and planning of the ferry and cruise port and the short-term decision of the shipping lines who are managing moveable assets and will decide to adapt/upgrade their fleet in a shorter term.

INVOLVE THE STAKEHOLDERS AT AN EARLY STAGE IN THE PORT PLANNING

Even if the development of port infrastructure projects are subject to common EU legislation, there are big differences in the way stakeholders are involved in the planning process. Many different stakeholders are involved in the development of new port infrastructure. This can delay the process and risks to disconnect the investment project from the economic cycle. The involvement of the local community in the process of master planning can in some cases even result in a dramatic "no-go", even if the economic opportunities for the surrounding population are considerable.

In order to get the public support, port authorities should bring together all stakeholders at a very early stage of the planning process. This will help to shorten the timeframes for planning new infrastructure and can result in a better coordination in time of supply and demand.

Building cruise or ferry port infrastructure should not be considered as a "port project" but as a part of the strategy of the city. **Cruise and ferry port infrastructure cannot be considered without considering the port-city infrastructure.**

Before designing new ferry facilities in a ferry port (e.g. three decks link spans, accommodation of doubled ended watercrafts, etc.), it is essential to **coordinate with the operators and the connecting port of origin or departure.** They might have a different agenda and could make the planned investments useless.

GOOD HINTERLAND CONNECTIONS ARE A MAJOR SUCCESS FACTOR FOR THE CRUISE AND FERRY PORT

Both for ferry and cruise ports, it is important to have quality hinterland infrastructure that enables passengers to have smooth access to the port as well as good connections to their desired destinations. Cruise and ferry ports should therefore strive to have high quality roads, good access to bus stations, airports and railway stations.

Investing in quality hinterland infrastructure not only benefits the passengers and the suppliers of the shipping lines, but can also contribute to decrease local traffic con-

Cruise Britain is pleased to have made a key contribution to ESPO's pan-European Code of Practice; acknowledging, sharing and learning from the regional and national diversity which makes Europe such a pre-eminent cruise destination is a core objective for us. As an association we represent the majority of British ports that welcome cruise ships and also many of the service providers working with the ports and the cruise lines. Cruise tourism is a growing part of the overall British tourism industry and we believe that industry co-operation and collaborative learning play a key role in the successful delivery of the product to the cruise lines and their passengers.

*Angie REDHEAD,
President Cruise Britain*

gestion and so make sure local population is not negatively affected. A dedicated road connecting the cruise and ferry terminal with the highway is a perfect way of optimising the hinterland links without hindering the local city traffic.

Appropriate car and bus parks are also essential to optimise connectivity to and from the port, certainly in the case of turnaround cruise ports.

It is also important to align departure/arrival times of ferries and cruise ships with departure/arrival times of train connections.

GREENING THE INFRASTRUCTURE AS TO MITIGATE THE ENVIRONMENTAL IMPACT OF CRUISE AND FERRY PORT BUSINESS

The quality of port infrastructure significantly influences the environmental performance of port operations overall and this is also true for cruise and ferry business.

There are not "one size fits all" types of solutions when it comes to greener port infrastructure. Ports should first evaluate the investments needed against the foreseen environmental benefits. **Decisions on green infrastructure investments are to be taken in close communication and cooperation with the port users and stakeholders.** After all, if the users and stakeholders are not convinced about the added value of these green investments, they will not use them and the environmental benefits will not be achieved. Moreover, they might also have to contribute to the costs of the needed investments either directly or indirectly.

A typical example of environmental infrastructure in ports is that of the **port reception facilities** for ship generated waste and cargo residues. All ports need to provide adequate waste reception facilities in line with the requirements of the EU Port Reception Facilities Directive. This is of particular importance for the cruise and ferry business where significant quantities of waste are produced on board and need to get delivered ashore. The adequacy of existing facilities, the level of service and the fees that the vessels need to pay for delivering their waste are at the heart of the discussions between the ports and the cruise and ferry lines. Extensive consultation of all port users is therefore essential in the formulation of the waste delivery and handling plans of

a port. Furthermore, the communication on the availability of services and applied fee systems needs to be transparent and easy to reach on the ports' website. It is also important that shipping lines share their concerns about the functioning of the port reception facilities with the port authorities. Filling in the complaint form will help port authorities to tackle potential issues.

Air quality is another key area where green port infrastructure can have a significant positive impact. Cruise and ferry terminals are traditionally located close to urban areas and the ship exhaust emissions impact significantly on the local air quality. The provision of onshore power supply (OPS) can drastically reduce the emissions from cruise and ferry ships at berth and lower the noise pollution as the ships are turned off while in port. The latest ESPO environmental review 2016⁸ has identified that one out of five European ports provides OPS at least at one of its berths. It appears though that this technology is currently primarily used by RoRo vessels and only to a very limited extent by cruise vessels around Europe. This can be justified by the differences between the cruise and ferry business in terms of frequency of calls, and the needs for electricity. The OPS business case for cruise vessels is clearly more challenging.

In addition, ports can take measures in order to support the transition from heavy fuel oil to cleaner fuels for ships such as liquefied natural gas (LNG). This can be facilitated by the provision of LNG bunkering facilities in ports. One out of five European ports can offer today LNG bunkering at least on an ad-hoc basis.

Both OPS and LNG bunkering require considerable investments with not always a clear business case. It is clear port authorities cannot take such investment risks. That is why the full engagement of all stakeholders is needed for a successful implementation.

The adaptation of port infrastructure to the effects of **climate change** is also an increasingly important consideration. The global warming and consequent sea level rise will put pressure on existing infrastructure such as quays heights or breakwaters. In addition, the expected increase in the frequency and magnitude of extreme weather conditions will impact both on infrastructure and port operations. Existing port infrastructure will need to gradually adapt and new infrastructure projects in

cruise and ferry ports will have to take into account the short and longer term effects of Climate Change. Ports that risk not to be accessible in extreme weather circumstances because of inadequate infrastructure, could lose a call.

At the end of 2015, ESPO joined the **Think Climate coalition** with the double aim to promote the reduction of greenhouse gas emissions in ports by shifting to low carbon maritime transport infrastructure and, secondly, to address ways to adapt maritime and waterborne infrastructure and operations to the potential impacts of climate change such as sea level rise and extreme weather conditions.

OPTIMISE THE USE OF DEDICATED CRUISE AND FERRY PORT INFRASTRUCTURE

The European cruise business —and to a lesser extent ferry— is a seasonal business. The dedicated infrastructure in the port is not always (fully) used all year round.

As terminals are often large spaces, situated on a nice spot on the seaside, they are the perfect venues to host conferences, parties and other events. Ports should therefore look out to find smart solutions to make sure the terminal can be easily adapted for organising these kinds of events.

Opening up cruise or terminal facilities in low season can generate additional revenues to the port and generate a better return on investment. Second, renting out these areas for local events or activities is a perfect way of bringing the city to the port and making the local community more familiar with the cruise and/or ferry activities.

8. www.espo.be/media/news/ESPO_EcoPorts%20Port%20Environmental%20Review%202016.pdf



Cooperation

Ports are connecting places, people and business

Cooperation is of paramount importance in the cruise and ferry business. All over Europe, cruise and ferry lines are connecting ports and regions. Moreover, for their cruise and ferry activity, port authorities need to cooperate with a wide range of stakeholders.

COOPERATION BETWEEN CRUISE PORTS

Cruise voyages call at different ports in one area allowing its passengers to visit different destinations. Even if neighbouring ports are sometimes competing for the same cruise call, they have an interest in working together to promote the area as an ideal destination for cruise holidays. **National or regional cruise port organisations** play an important role in **marketing** a region as the ideal cruise destination and create synergies in view of enhancing the exposure of the different ports at international events. But there is more. By working together, as opposed to working one against another, cruise ports can assure in certain cases a **better service towards customers** and a **stronger voice** towards third parties. **Developing common quality guidelines** for all member ports is another tool to raise the profile of the cruise ports in a certain area. Sometimes the cooperation is bringing ports together that **share a more particular goal**, a common vision or aim or common (high) quality standards.

Bilateral cooperation between two neighbouring ports can also **help in addressing congestion issues** in a port and can create a win-win for both ports. The strength of one port is complemented with the strength of the other one. The congested port can rely on the neighbouring port as relief port. The relief port can gain experience, know-how and marketing competence from the congested port. Such a cooperation can also solve temporary problems with hinterland connections in one of the ports (e.g. closure of tunnels).

If ports relatively close to each other focus on differentiating themselves from each other with regards to attractions, shore excursion offerings, etc., this could lead to both ports being visited instead of just one of them.

COOPERATION BETWEEN FERRY PORTS

Ferry links are in general ensuring the link between two ports and two destinations on a regular basis. In most of the cases, the ferry connections of a port are not changing very often. This implies that two ferry ports linked by a certain connection can develop a long-term relationship. They can work on well-thought common solutions in view of enhancing the fluidity of the transit and of limiting the administrative burden. At national level, ferry ports are gathering with the aim of addressing common concerns as regards border controls and government agency activity at the border.

EUROPEAN NETWORK OF CRUISE AND FERRY PORTS

This network was established in 2014 in Barcelona by the European Sea Ports Organisation (ESPO), MedCruise, Cruise Baltic, Cruise Europe, Cruise Norway and at a later stage was also joined by Cruise Britain (see page 41 for a detailed description of those organisations).

ENHANCE THE COOPERATION BETWEEN THE DIFFERENT CRUISE AND FERRY STAKEHOLDERS IN AND AROUND THE PORT

Cruise and ferry business involves a wide range of stakeholders: the port authority, local/city authorities, destination management/tourism authorities, (hinterland) transport authorities, independent transport operators, tourist agents/shore excursion agents, shipping agents, cruise and ferry lines, local vendors, local population, passengers, hospitality industry, border control, harbour master's office, technical/nautical services, etc. (see overview page 14–15). Each year, in advance of the new cruise season, some port authorities bring together all key representatives involved in cruise operations to share key information regarding the upcoming season. In view of developing a strong partnership and cooperation between stakeholders, it is important to identify a "champion", a leader, someone among the stakeholders who steps forward and takes the lead in gathering all the relevant parties. In many cases, the port authority is the most appropriate entity to take up that role, but in some cases it can also be the tourist information office or the City Council.

In some cases a real network of local stakeholders is being set up. Such a network can be developed as a "club" where both the public partners (port authority, local authority, chamber of commerce) and the private sector (cruise companies, retail sector, cruise related services) meet on a regular basis in view of solving issues, discussing the further development of the cruise activity or tackling issues of sustainability.

On 5 March 2015, the European Commission launched the Pan-European Dialogue on Cruise at a conference in Brussels, which brought together over 300 representatives from the coastal tourism sector, port authorities and cruise operators. The Pan-European Dialogue between cruise lines, cruise ports, and stakeholders facilitates the coordination between different actors contributing in responsible growth. Stakeholders convened to introduce initiatives on three aspects. The first one is to ensure that growth can be made sustainable. The second one refers to the costs and impacts of cruising. The third one is the cooperation of cruise ports with cruise lines for joint solution on themes such as making berthing policies and tariffs more transparent, finding a common approach on how to handle inappropriate double booking of berths, and compile 'common challenges papers that are communicated to policy-makers'.

Cooperation with Shipping Lines (see Chapter III, Relationship with Ferry and Cruise Lines)

FREIGHT AND PASSENGER OPERATIONS IN A PORT: WORK ON A BALANCED "COHABITATION"

In most of the cases, European ports are serving freight and passenger operations. Both activities respond to different needs, priorities and serve completely different customers. In the port it is one port authority dealing with both markets.

Finding the right balance of "cohabitation" between the two market segments is often a challenge. Where relevant, port authorities should step up their efforts to work on a balanced spatial and functional development of both sectors in the port.

To do so effectively, it is necessary to involve as many stakeholders as possible and to create an efficient communication strategy.

ENSURING HEALTHY COMPETITION BETWEEN NEIGHBOURING PORTS

Port business is a competitive business and should remain so. Cruise and ferry ports however realise that there is more to lose than to win by competing in such a way that cooperation is no longer possible. Too harsh competition between neighbouring ports can result in a loose-loose for every port in the region. Therefore, even if competitors, ports should realise that keeping a cruise line in the area is a common challenge and a main priority. Sometimes, healthy competition may involve cooperation agreements between nearby ports.



Cruise Europe as an organisation is unique in its geographical spread from Lisbon to North Cape, St Petersburg, Iceland, Great Britain and Ireland. Starting in 1991 with 27 ports, we have grown to a unique 120 members — and we are continuing to attract new members. This is an achievement of which we are very proud and it makes Cruise Europe a representative organisation with the ability to add significant value to the cruise sector. Membership of Cruise Europe enables individual ports to market themselves through cooperation and collaboration to the cruise lines in a cost-effective manner, and in particular the smaller and “niche” ports that would not have a budget for large marketing and promotional campaigns.

Captain Michael
MCCARTHY,
Chairman Cruise Europe



Relation with Cruise and Ferry Lines

Ports and lines together at the service of the passenger

The existing differences in port governance across Europe imply a varying involvement of port authorities in cruise and ferry terminals. Ports that are operator of the passenger and/or cruise terminals are more directly involved with the lines. The others (landlord model) have more indirect relations. It is worthwhile to note that many more port authorities are operators when it comes to the cruise and ferry terminal, whereas for freight, the port authority is on average more pure landlord, leaving the operations to another company.

In terms of their 'customer' relationships there are some similarities between cruise and ferry ports. They share the same operational issues and challenges, but the commercial or business relationships are in both cases very different.

Cruise ports are operating in a different context and dynamics than ferry ports. The nature of the cruise industry means that ships and voyages are both adaptable and movable. Ports can never take a cruise call for granted. Moreover, the increased consolidation in the cruise shipping sector faces the port with a smaller number of decision makers with sometimes excessive market power. Losing a cruise line can suddenly mean losing a big market share. At the same time, the consolidation can also be seen as an opportunity. Alliances allow the cruise lines to reach out to different markets without additional means.

Another important trend is that cruise lines are currently more than before involved in the construction and operation of cruise terminals in Europe. That trend further changes the sector.

Ferry ports are also often faced with a concentrated market power. They often depend on one or two ferry lines serving their port. This gives these ferry lines a strong position in their relation with the port.

INVEST IN A LONG-TERM RELATIONSHIP

Ferry ports have longer term relationships with the ferry lines and routes are set and stable. The challenge for ferry ports therefore is to maintain these longer term relationships and to work together to plan port investments in new facilities. Ferry lines serve long-established routes on a commercially viable basis. They solve connectivity issues and promote tourism. For small islands, ferries are often the "life lines" connecting those to the mainland. They are also often used by commuters.

In ferry business, the port has only a very limited interaction with the passengers. The main shared objective of both ferry ports and lines is to move passengers, cars and freight as smoothly as possible from port to port. The time spent in the port has to be as short as possible allowing the passengers to continue their journey or reach their destination as soon as possible. A change in arrival and departure can have a large impact both on users, who are often regular users, and on the connecting hinterland connections. Changing security measures can also impact the ferry business. Ferry ports and ferry lines can develop common strategies to lobby on issues such as government agency border activities and hinterland connections.

Cruise ports invest more time and effort in marketing their port to the lines and building relationships. The cruise port/line relationship differs following the nature of the port's operation. Turnaround ports

need to have strategic relationships with cruise lines, given the size and the range of the required services, including the need to provide dedicated cruise facilities. **Marquee ports** are in a stronger position as they are “incontournable” and rarely excluded from regional cruise itineraries. The majority of cruise ports are however **transit ports**: they are exposed to uncertainty and the absence of commitment from the cruise lines.

The target for cruise ports is twofold. The first one is to **build relationships from an early stage and reach the longest-possible commitments from cruise lines**. This can be achieved through the following means:

- The port authority engages in direct communication with the cruise lines;
- Regular meetings with the cruise lines are being set up;
- Cruise ports and cruise lines conduct common surveys;
- Cruise ports and cruise lines establish a dialogue to discuss operational details (see also below);
- Communication should not be limited to the technical details but also tackle the strategy in the longer term.

The second target is to **jointly work on an agenda enabling sustainable growth**. This can be achieved by involving stakeholders in a better way and the organisation of the whole cruise supply chain. Port authorities can lead cruise clusters with the participation of all local stakeholders (terminal operators, shore excursions, local shopping and touristic destinations).

IMPROVE OPERATIONAL UNDERSTANDING

A number of operational issues are common for ferry and cruise ports. The efficiency of port operations requires good communication between ports and lines, with all aiming at reaching consistency of messages between senior management and day-to-day operations.

In order to improve operational understanding, cruise ports and cruise lines should work together and plan ahead in order to ensure there are no last minute issues or disappointments for both the lines and the ports.

Cruise ports and cruise lines should endorse a supply chain approach that secures flows of information between the different actors and enhances the experience of all stakeholders involved. Key examples are the information flow in the cases of (i) cruise lines – agents – port – terminal operator (whenever involved) (ii) cruise lines – tour operators – port – terminal operator (whenever involved).

The challenge, notwithstanding the contractual relationship between cruise lines, their agents or appointed tour operator, is to **develop more direct communication between ports and cruise lines** so as to improve operations and ultimately the passenger experience.

OPTIMISE SCHEDULES AND ITINERARIES

Ferry ports and ferry lines work together to negotiate optimal schedules. A **better coordination** of planning and scheduling of ferry calls as well as hinterland operations will avoid congestion and peak hour traffic and improve the passenger experience.

Ports, terminals and shipping companies can also **share forecasts** for passenger boarding, highlighting days with heavier traffic in order to optimise the management of resources, the operating space and the logistical solutions.

The same counts for **cruise ports and cruise lines**. Ports are reluctant to invest in the provision and allocation of berthing facilities on a long-term basis, when they are faced with suddenly changing plans and itineraries of cruise lines, double bookings, etc. practices that may unexpectedly leave the port without business and subsequent incurred costs that are not recovered.

By working together to improve the scheduling of calls, and thus also minimizing the negative impacts on the region, the cruise industry can improve its image. Working together towards **long-term planning** serves the interest of all parties.

One way to address this challenge can be to develop a uniform system of advance booking and confirmation of cruise ship berths for different ports in a region. Applied in a transparent way, such kind of system provides cruise lines with an advanced commitment of berth availability and booking confirmation on dates well in advance.

Ports and shipping lines should also work together on developing transparent practices in case of cancellation of reserved calls for other reasons than “force majeure”.

Cruise Norway's main objective is to market Norway as the world's ultimate nature-based cruise destination. Cruise Norway represents over 30 Norwegian cruise ports and destinations, in addition to cruise agents, transport companies and other Norwegian suppliers to the incoming cruise market. The set-up of the Cruise and Ferry Port Network within ESPO, and this Network's establishment of the Code of Practice, were two of the main objectives set forth in the Strategic Cooperation agreement between ESPO and Med-Cruise, Cruise Europe, CruiseBritain, Cruise Baltic and Cruise Norway. As Chairman of Cruise Norway, I am very proud of our — and our sister organizations' — contribution in creating and establishing the ESPO Code of Practice for Cruise and Ferry ports. This Code of Practice will strengthen ESPO's position as the official voice of the European Cruise and Ferry Port sector towards the European institutions, as well as enhance the collaboration, cooperation and development of our cruise ports.

Ingvar M. MATHISEN,
Chairman Cruise Norway

JOIN FORCES IN DEFENDING COMMON INTERESTS IN POLICY MAKING AND IMPLEMENTING LEGISLATION

Ferry and cruise ports are facing an increasing level of international, European and national regulation affecting their business. Both at the level of the decision making process that leads to new legislation as at the level of the implementation of new legislation, port authorities and ferry and cruise lines can identify common interests and work together to defend them.

At the level of policy making, shipping lines and ports can **work together to explain the structure and specificities of their industry to policy makers**. Even if both stakeholders will assess an upcoming policy from their specific angle, they can define common challenges and concerns and join, where possible, their efforts to lobby for initiatives that better reflect the needs of the sector.

When it comes to implementation of legislation, shipping lines and ports can **exchange knowledge** on how to implement, coordinate practices, secure the essential commitment, in order to implement legislative requirements. Through good communication during the implementation process between the lines and the ports, concerns can be tackled and misunderstandings taken away. Moreover, the dialogue between cruise and ferry ports and the cruise and shipping lines can result in a more practical and efficient implementation of the new rules.

To enhance the cooperation on policy making and on the implementation of legislation, port authorities and their associations work on strengthening the collaboration with cruise lines and their associations at regional, European and international level. This cooperation might take place at different levels, and will often depend on local and regional conditions. The quality of this collaboration increases by the realistic acknowledgement that in a number of issues the priorities and core interests of each industry might be different.

WORK HAND IN HAND TO PROMOTE AND STRENGTHEN THE IMAGE OF THE SECTOR

Port authorities and ferry and cruise lines can join forces to promote the sector.

Ports and shipping lines can for instance invest together in travel agent training as well as research and marketing communications to promote the desirability of cruise holidays in a certain region with thousands of travel agencies and travel agent members.

Ports and shipping lines can also develop a common stand highlighting the economic value of ferry and cruise activities to their wider region and stakeholders. They can work on common communication tools, align their messages and coordinate their approach.

Finally, ports and shipping lines can develop a common strategy to counter the public perception or misunderstandings about the sector.



Security

Applying the law with a smile

It is clear that 9/11 has had a significant transformative impact on Europe's security policy in general and on port security in particular. Moreover, the current climate of increased terrorist threat and increasing migratory pressure are imposing a greater burden on port security, border controls and custom inspections. It is without saying that the challenge is even bigger for passenger handling ports.

One of the main challenges with regards to security is to make sure that cruise and ferry ports are complying with the standing security related legislation in the most effective and less burdensome way. Let's summarize it as follows: passengers embarking on a ship want to feel completely safe and secure but at the same time they do not like to queue, they do not want their voyage to be delayed.

Moreover, even if immigration, customs and counter-terrorism controls and activities, are carried out by immigration and security services and not by port authorities, they are seen as part of the port experience since they take place on the port premises. Unpleasant experiences during checks and controls will be perceived as a bad port experience.

On the contrary, well-performed and high level security performance at a port can increase the quality of the service of the port and can become a marketing tool towards the shipping lines and their customers.

Finally, one should be aware that there can be major differences when travelling within or between two Schengen countries or when entering or leaving the Schengen area.

OPTIMISE THE ENFORCEMENT OF ISPS

In the wake of the terrorist attacks on 11 September 2001, the International Maritime Organisation (IMO) came up with an International Ship and Port Facility Security Code (ISPS Code) which contains a comprehensive set of measures designed to enhance the security of ship and port facilities. In 2004, these measures were subsequently also taken over in EU law, making the provisions of the ISPS Code directly applicable to all ports in the European Union, including those that conduct cruise and ferry operations.

Equal implementation of ISPS in European cruise and ferry ports is seen as challenging. The current implementation of ISPS can vary from country to country, leading to a situation where European ports might take different measures to face threats that in many cases are the same. The ISPS operation level can be different for two ports at the end of the same ferry route. One has to note though that in some cases, this can be due to different circumstances at a given time in the different ports.

To overcome needless divergent enforcement of the rules, the national authority or administration looking after the implementation of the ISPS rules can help the ports by **developing detailed service guidance for port security facility officers**. To ensure a proper application of the legislation, many **competent authorities can establish this in regular contact with each of the ports**.

Training is also an important factor to optimise the enforcement. There is a need for additional training and education of local police and authorities in view of enhancing the cooperation at the level of security and safety (ISPS).

Port security employees are in some countries trained as felt appropriate by the authority concerned. In this case however, there is a greater risk of inconsistency in the approach between different ports. In some cases, it is the competent authority which organises the training. This often results in a certification of the trained security staff. Next to the training, it is important that port security employees know what is expected from them, also when their tasks change in function of new developments or security threats.

Besides standard training, innovative ways such as setting up **e-learning programmes** could ensure that ISPS is more widely understood on an ongoing basis. The training is organised by the competent authority or can also be given by the port authority itself.

CREATE A MUTUAL UNDERSTANDING BETWEEN PORT AUTHORITIES AND IMMIGRATION AND SECURITY SERVICES

Ensuring an optimal level of security to its passengers is a primary goal of every passenger handling port. At the same time, unnecessary delays and long queues will give the port a negative image, can make travelling through a certain port less attractive and discourage passengers eager to go to their destination.

Applying the law with a smile should be the leading principle of every person performing security tasks. It is therefore of paramount importance that security employees, local police, border police and customs are in sufficient number as well as have good educated personnel and state-of-the-art equipment fit for the tasks they have to perform.

Making security and border checks as efficiently as possible without giving in on security should be a first priority. One way is to **avoid double checks**. Passengers that take a ferry or cruise ship departing from a Schengen country to arrive at a non-Schengen country (and vice versa) risk being subjected two times to the same border and customs controls, once upon departure and once upon arrival, consequently leading to unnecessary and burdensome delays. Therefore, cooperation between national governments and authorities should be encouraged, for example by concluding **bilateral agreements to set up joint controls at the port of departure and by establishing communication platforms to facilitate controls**.

Not every port is subject to the same risks. **Service level agreements** between governments and low passenger/low risk ports can help in ensuring the right level of security in a given port.

Finally, central government agencies should develop ways to communicate well with their own front line staff at the border.

WORKING TOGETHER WILL ENHANCE SECURITY AND REDUCE COSTS

For many ports ensuring an optimal security means a serious effort in terms of organisation, know-how and money. For smaller ports and ports that cannot count on regular (cruise) calls, developing and applying detailed security procedures and plans are a big challenge.

Ferry ports that are linked on a regular basis can develop **consistent standards** or even organise **joint controls**, thus avoiding duplication and reducing costs.

In order to find concrete solutions to security problems, neighbouring ports should be encouraged to liaise with each other and share their expertise. As some cruise and ferry ports face the same challenges, they might as well **bundle forces and cooperate in order to come up with an effective response**. For example, ports that have a particular expertise in the training of skilled security staff could in fact assist other ports that lack those training capabilities. Smaller ports can in some cases even **share staff**.

COMMUNICATING ABOUT SECURITY

It is important that the port authority communicates on a regular basis to ferry and cruise lines and their passengers about the security strategy in place and inform them in due time about upcoming changes in procedures or operations. A timely information of the ferry and cruise lines and their passengers will allow them to know what to expect and how to be prepared. It can also help reinsuring cruise and ferry lines and their passengers about the optimal level of security applied. One has to realise though that in some cases security procedures are literally changing over night. Such sudden changes can make it quite challenging for the port to inform the cruise and ferry lines in time.

The current refugee crisis faces certain ports with an additional communication challenge. The refugee crisis does not always portray ports in a positive light. Ports that are directly affected by this crisis can suddenly be in the middle of a media attention they are not used to. Moreover, it touches upon a very sensitive political and human reality, outside the scope of the port's daily business. A decent port media strategy and training could offer a solution.



MedCruise is proudly co-signing the Code of Practice for Cruise and Ferry Ports, a valuable tool to be used in promoting sustainable passenger traffic growth that is also communicating ports perspectives to stakeholders and policy-makers.

This is a major step of the Cruise and Ferry Port Network, established in 2014, under the umbrella of ESPO. Our members are excited with the opportunity to unite all European ports and conclude on the best ways to address key challenges, point best practices, and detail foundations of relations with ports users.

MedCruise ports will confidently continue to seek further growth of the 27 million passengers and 13.200 cruise calls hosted per year, while actively strengthening the voice of a Network speaking with one voice for the European cruise and ferry ports sector.

*Kristian PAVIĆ,
President MedCruise*



The Organisations in the Network



The European Sea Ports Organisation (ESPO) represents the port authorities, port associations and port administrations of the seaports of the 23 Member States of the European Union and Norway at EU political level. ESPO has also observer members in Iceland and Israel.

ESPO is the principal interface between the European seaport authorities and the European institutions.

In addition to representing the interests of European ports, ESPO is a knowledge network which brings together professionals from the port sector and national port organisations.

ESPO was created in 1993.



Cruise Baltic is a close cooperation between 28 destinations in the Baltic Sea Region. Its aim is to integrate the region's international cruise tourism industry by exchange of knowledge and information. Through Cruise Baltic, all the participating countries are able to offer the same service, high standards and full integration between ports and cities for cruise lines that want to discover the unique possibilities of the Baltic Sea Region.

The number of cruise tourists visiting Cruise Baltic destinations has risen from 1.7 million passengers in 2004 to approximately 4.4 million passengers in 2014.



Cruise Britain is a joint initiative between British cruise ports and service providers such as ground handlers and port agents. The organisation focuses on raising the profile of Britain as a world-class cruise destination. Its membership-based organisation includes the network of British ports plus the service providers, who combine to provide a seamless visitor experience.



CRUISE EUROPE

Cruise Europe was the first cruise port association, founded in 1991. It is now representing 115 members in Northern and Atlantic Europe.

Its members host 7000 calls from oceangoing cruise ships and 10 million passenger movements.



Cruise Norway is a B2B marketing organization with 40 member ports in addition to associate members from attractions, tourist boards and ship/port agents throughout Norway. Our vision: to contribute to the perception of Norway as the world's best nature-based cruise destination. In 2015 Cruise Norway members hosted approx. 2.5 million passenger movements and 1,739 calls. As of 2009, cruise ship visit all through the year; also in winter.



Set up in Rome on the 11th of June 1996, MedCruise is the Association of Mediterranean Cruise Ports. The mission of MedCruise is to promote the cruise industry in the Mediterranean and its adjoining seas. The association assists its members in benefiting from the growth of the cruise industry by providing networking, promotional and professional development opportunities. Today, the association has grown to 73 members representing more than 100 ports around the Mediterranean region, including the Black Sea, the Red Sea and the near Atlantic, plus 34 associate members, representing other associations, tourist boards and ship/port agents.

Its member ports host over 27 million passengers and 13,000 cruise calls per year.

ANNEX: Important definitions

Marquee port: Ports which are rarely excluded from the regional cruise itineraries, and are the main tourist destination in an itinerary.

Transit call, "Port of Call": Refers to a cruise call into a port, where passengers and crew are effectively day visitors.

Turnaround call: Refers to a cruise call at a port where the cruise begins or ends and where the cruise passengers embark or disembark.

Turnaround port: Refers to the port where an itinerary starts or ends.

Transit port: Refers to a cruise destination on the itinerary of a cruise ship.

Ferry: A commercial passenger transport service by sea or inland waterways operated according to a published timetable.

Ro-ro passenger ship: Means a ship carrying more than 12 passengers, having ro-ro cargo spaces or special category spaces.

Ro-ro ship: Freight ship or ferry with facilities for vehicles to drive on and off (roll-on roll-off); a system of loading and discharging a ship whereby the cargo is driven on and off on ramps. Equipped with large openings at bow and stern and sometimes also on the side, providing easy access. Fully loaded trucks or trailers carrying containers are accommodated on the deck.⁹

Cruise destination: The port destination of visit by cruise ships.

Cruise voyage: Refers to a voyage by a seagoing vessel, mainly for pleasure. No cargo/rolling stock will be transported but only passengers with tickets that should include accommodation and all meals. The cruise voyage must include at least two visiting ports apart from the starting and ending port.

Passenger visit: Refers to a visit by a cruise tourist to a particular port. A turnaround port can receive two passenger visits by the same passenger during a cruise.

Coastal region: A region directly situated on the coast of the European Union or its territorial areas.

Indirect economic impact: The value added and employment created at suppliers (and those supplying the suppliers) by means of intermediate purchases.

9. www.searates.com/reference/glossary/R/

Colophon

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References

Some of the information used in this Code of Practice for Cruise and Ferry Ports was based on publications of the European Parliament, the European Commission, Eurostat, Cruise Lines International Association (CLIA) and the European Sea Ports Association (ESPO).



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