

# The Channel in 2030

## Looking ahead



### Main factors of influence on the economy and the shipping in the English Channel

### Reference points - possible trends

#### Maritime transport

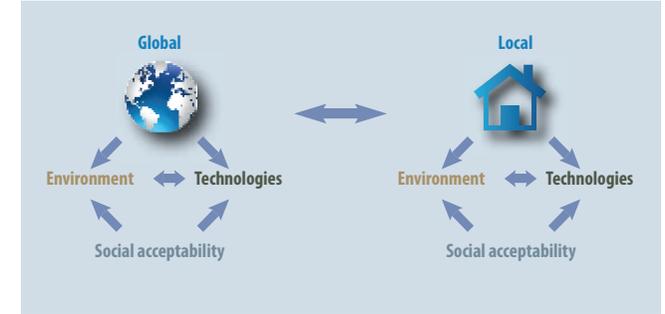
- Trend towards massification
- Geographical and functional concentration on major ports
- Opening of new routes
- Continued increase in the size of container ships
- Development of cross-docking platforms for trans-shipment
- Changing role of small/medium sized ports
- Developments in ship propulsion and engines

#### Transport developments specific to the Channel

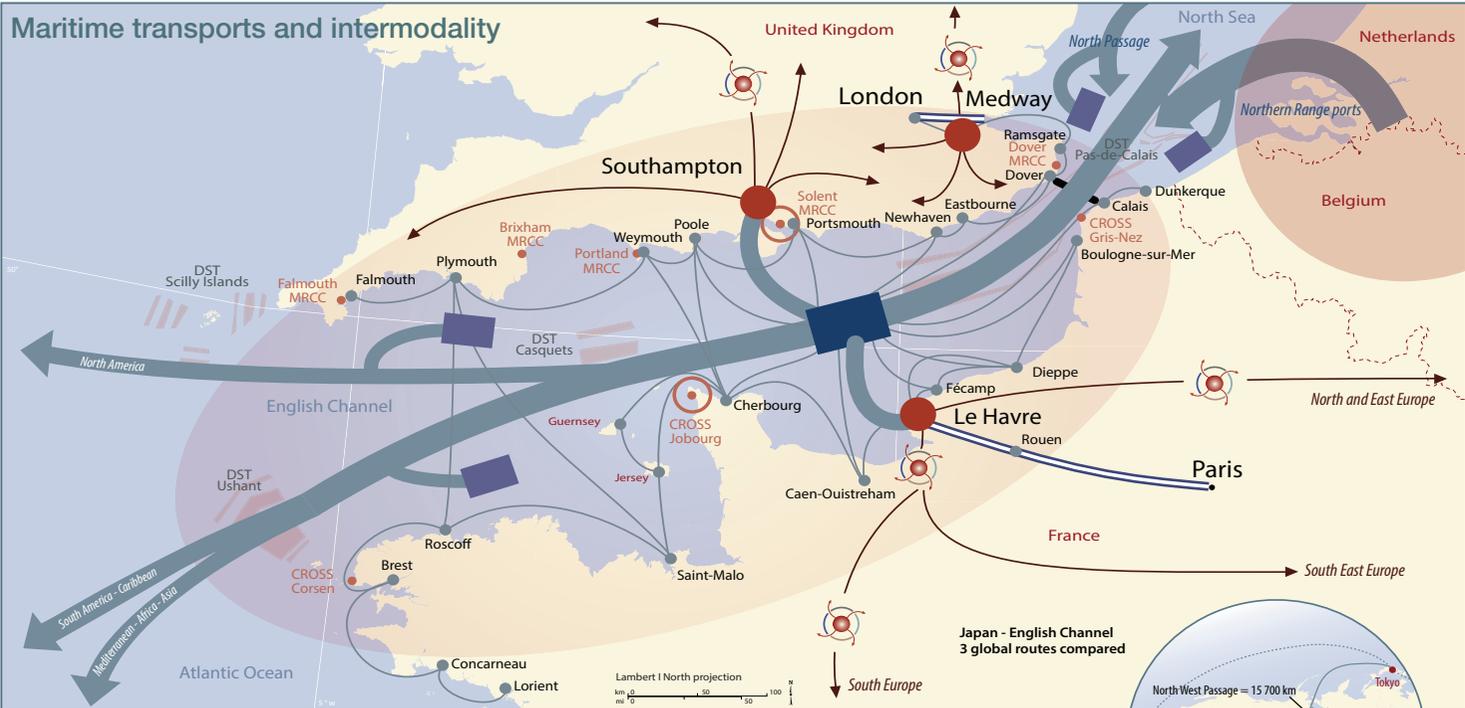
- Long term stabilisation of routes and traffic flows
- Increased role of Channel Tunnel
- Increase of traffic security, on of the world regions with the most-advanced traffic security system
- Adaptation of procedures systems used in air traffic control
- Development of fast ships and new propulsion technology

#### Energy developments in the Channel

- Changes in relationship between refinery / terminal / transport of refined products
- Decrease in number of refineries
- Increase in transit of refined products
- Development of marine renewable energy
- Wind farms, wave power generation installations
- Development of new techniques
- Changes consequent on energy distribution networks



### Maritime transports and intermodality



#### What exist at present

- Port
- World traffic
- Channel Tunnel
- 'Northern Range' ports

#### What might exist in the future

- Gateway: Seine axis, Thames axis
- New short sea shipping
- Megamax artificial harbour (ships with more than 20 m draught and links to adjacent ports)
- Ships waiting area Megamax

- Feeding hub port
- Multi-modal platform
- Hinterland links: redistribution of freight
- Reinforced control of maritime zone
- New control centre modelled on air traffic systems



The cartographic representations making up this portfolio present the rich tapestry of activities to be found around the Channel. Clearly the picture is constantly evolving, which in turn begs the question of what we might expect to see in 30 years time. The key parameters shaping the direction of a probable scenario are already in evidence - the growing reach of globalisation, the ever present role of new technology and the political sensitivities of environmental impact. At the centre of this triptych is the whole issue of social acceptability, particularly in respect of major infrastructural developments (and not least the attendant questions relating to conflict resolution when protests arise). What is certain is that the pace of change is likely to be both intense and rapid.

So will the Channel continue to hold its position as a premier global maritime transport corridor? Already the 'Northern Range' ports have seen their dominance giving way to the rapid rise of those in the Far East indeed a 'global shift' in favour of Asia and the Pacific. However, such trends do not preclude the Channel's continuing strategic role, neither does the opening up of new sea routes, as in the case of the Arctic North West passage (or even the North East passage), still decades away. What is more immediately relevant is the emergence of China as the world's new global workshop, and the flow of manufactured products from Asia onto the European market. Much of the latter traffic will be via the Channel, thereby boosting its continued strategic importance as an artery of trade.

These new geographical and economic realities have been accompanied by an increasing massification of maritime transport in the search for greater energy and logistical efficiency. In December 2012, the CMA CGM 'Marco Polo', the world's largest container ship (16,000TEUs), entered the Channel, and later just able to manoeuvre its way through the Dover Strait. Such physical constraints suggest a new role for 'cabotage' short-sea shipping and feedering in a re-organised system of sea transport in the Channel. The giant container ships could in the future be unloaded onto cross-docking platforms out at sea, for onward transshipment via relay-vessels to Channel and 'Northern Range' ports. Such a radical reorganisation would need to go hand in hand with the development of new technologies, especially in the fields of ship propulsion and engines, in line with environmental and energy priorities.

As an economic sector, energy may well prove to be one of the key areas in the Channel's future development. Already a major transit corridor for oil distribution, as well as currently for nuclear power production and reprocessing, the Channel is likely to become an important locus of renewable energy generation. This stretch of sea harbours one of the greatest potential sources in the world, thanks to its offshore wind, sea currents and tidal swell. The large scale generation of renewable energy should now gain ground. The importance of installations already in place, as well as planned for, on the English side of the Channel is encouraging. With the continuing development of other technologies, the Channel is well positioned to play a key role in the region's future energy mix.

Even so, social acceptance will also play a vital role in this regard and dictate the speed of change.