

2017 - 2018

Annual Report

European Shortsea Network



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Shortsea Promotion Centre

CHAIRMAN FOREWORD

EU launched the concept of SSS in 2001 having as the basic objectives: freight flow concentration on sea-based logistical routes; increased cohesion; and reducing road congestion through modal shift.



That is way is considered that SSS plays a key role in reaching the European goal to shift 30% of the cargo from road freight over 300 km in Europe.

The Shortsea Promotion Centres (SPC), established in nearly all coastal EU Member States coordinate their own actions to promote Short Sea Shipping within a European Shortsea Network (ESN).

Having as main objectives the exchange of ideas on key issues and the identification of common problems, needs and bottlenecks arising in the short sea shipping we raise awareness and get into contact with national and European potential users of shortsea transport, shipping companies and other related organisations contributing to enhancing the growth rate of the sector.

The main challenges for our members are related to energy and fuels, technology trends, the education gap and investment strategies. Even if is not new, the integration of short sea shipping into full logistics chains is still a current challenge for the industry.

ESN is acting actively in giving an adequate input to the future legal framework related to the environment and how this will be well adapted to the specific of short sea shipping.

We are living in a very dynamic era where the new forms of logistics and the new technologies will change the business, as we know it today. There are a number of challenges ahead. We have to be ready to tackle them and our network is ready to keep us together in this challenge.

In order to develop and implement the new technologies we will have the task to increase our access to European funds through different research programmes or financing schemes and to address the changes of future transports.

Most of the ESN members have participated in such projects and have assisted the industry in developing innovative transport solutions.

I fully encourage all stakeholders to use the opportunity to share with us our common interest in promoting a sustainable and efficient shortsea transport on a highly competitive market.

Prof. Costel Stanca

President, European Shortsea Network

INTRODUCTION

The demographics of Europe are changing rapidly as are the logistics requirements both for manufacture and consumer goods. Competitive pressures and changing consumer habits demand more efficient, cost effective and environmentally friendly modes of transport.

This is the main challenge facing shortsea shipping which is gearing up to these new challenges through research, innovation and cost cutting. The developments being made in propulsion technology and CO2 emissions make shortsea shipping a pioneer in innovation which has as its main objective the support of the cargo owners. The task of the ESN is to have a platform where shipping of volume cargo can be effected in a manner which does not harm the environment, at a price which the consumer finds competitive and where the private investor can earn a decent return on the capital invested.

The ESN can be relevant and effective in as much as its member countries are effective and proactive. There is no doubt about the advantages of having a neutral and professional body which has no profit motive and hence whose agenda is that of promoting shortsea shipping. ESN on its own however can make little headway, it needs interaction with the policy makers and investors in ships to ensure that shortsea shipping leads to the logistical solution that the cargo interests require. The addressing of bottlenecks and other inefficiencies should give the desired results. This calls for continuous interaction and dialogue which ESN needs to undertake with the commission.

This report highlights the activity of each SPC throughout the year. For 2018 the highlight was the 3rd ShortSeaShipping Days event held in Munich.

The press release resulting from this event follows.

350 GUESTS ATTENDED THE 3RD SHORTSEASHIPPING DAYS

INNOVATIONS PROVIDE INTERESTING OPPORTUNITIES FOR ADDED VALUE

Bonn / Lübeck, 27 June 2018 – The third ShortSeaShipping Days showcased shortsea shipping as a modern and innovative transport sector, which offers numerous high-tech developments to deal with current challenges and to be competitive and prepared for the future. The event was held in conjunction with the annual conference of the European Shortsea Network (ESN).

A broad portfolio of innovative solutions for automatization, shipping 4.0, and sustainable, emission-free transport was presented at the third ShortSeaShipping Days, underlining the pioneering role that shortsea shipping plays in the maritime economy. Around 350 representatives of the maritime sector met up in Lübeck on June 20 and 21 to discuss current developments and challenges in the European market for shortsea shipping. “The ShortSeaShipping Days have become established as the leading platform for information and networking in the branch,” stated Norbert Brackmann, the German federal government’s coordinator for the maritime industry. In his welcoming speech, he emphasized the importance of the shipping industry for cargo transport in Europe. In view of the challenges that growing cargo volumes and increased environmental awareness bring, Brackmann made a case for thinking about logistics chains holistically and paying more attention to shortsea traffic. At the same time, he also pointed out the economic aspects: “Green shipping and smart shipping will present attractive possibilities to achieve added value in cargo transport in the coming decades.”

In their presentations at the third ShortSeaShipping Days, a total of twenty speakers discussed the current state of green and smart shipping in conjunction with regulatory frameworks. At the marketplace, which was another part of the event, 40 well-known companies from the shipping branch showcased their range of services at their stands. This allowed visitors to get in touch with service providers in this field directly.

Under the three topics “market development,” “innovations,” and “logistics,” a range of tools, measures, and concepts were presented that ran from retrofit projects and hybrid propulsion through alternative fuels to fully automated, autonomous containerships. For example, Roger Trinterud, Senior Sales Manager of the Norwegian technology company Kongsberg Maritime AS, was able to introduce the first autonomous electrically powered ship worldwide, the Yara Birkeland. The ship has a capacity of 120 standard containers and will start shortsea operations for the Norwegian chemical firm Yara at the beginning of next year. After a short test period, the zero-emissions ship will be sailing without any crew on board from 2020 on. “The Yara Birkeland marks the beginning of a new high-tech era for the maritime economy,” Trinterud said.

In view of the regions and distances covered, the costs of investments for shipping lines, and the operating lifetime of the vessels, which is up to 25 years in the shortsea segment, there will be a transition period involving bridge technologies. Speaking of fuels and propulsion technologies, Jost Bergmann, Business Director for Containerships at DNV GL SE, referred particularly to liquid natural gas (LNG) and electric motor technologies, mentioning that rapid expansion of the necessary infrastructures is required. Scandlines is already involved in electric drives: six of the eight ro-ro ferries that the line operates on the routes Puttgarden-Rodby and Rostock-Gedser are equipped with hybrid motors. Scandlines is able to save an average of 3,900 tons of CO₂ per ship per year. In addition, the ships' closed scrubbing systems take care of 90 percent of the sulfur and particulate emissions.

Besides high investments for new ships or refitting, every ship operator can take affordable measures in terms of fuel consumption and "immediately get involved in decarbonization," according to Tim Busse, manager of the Dutch fuel developer Good Fuels Marine. He introduced a second-generation bio-fuel that is made by hydrating used cooking oil or waste products from paper production. This fuel can be mixed in any proportion, thus making it possible, as Busse said, to reduce SOX emissions down to zero and CO₂ by as much as 90 percent.

Shortsea shipping's competitive position is shaped not only by innovations and sustainability, but also by paying attention to what customers want. "Environmentally friendly measures are nice to have, but for most consignors the costs are still decisive," according to Knut Sander, managing partner at the Robert Kukla forwarding company. Along with Sander, Holger Seifart, Chairman of the German Sea Shippers Committee in the Federation of German Industries (BDI), and Andreas Tonke, director of Transport Management at BSH Home Appliances, also spoke about consignors' expectations and the competitive pressure they are under. They made an appeal for more aggressive marketing of the advantages that shortsea and inland waterway shipping offer, such as availability without special investments, the rate structure, and reliability within the supply chain. Integrated logistics chains involving rail and truck transport can offer enormous potential for shifting transport modes, particularly in view of the scarcity of drivers and capacity. Tonke underlined that BSH sees the possibility of up to doubling the cargo volume transported by ships.

While they did present varying options, the speakers were unanimous in the opinion that the high development costs that first movers have to bear in making innovations need to be accompanied by startup financing and subsidies as well as reliable regulatory frameworks. This applies equally to

innovative new developments and building up the infrastructure as well as for fundamental decisions, for example in the case of Brexit and regulations for cross-border trade in the future. The drawn-out negotiations between London and Brussels undermine reliable planning of future logistics chains, their IT infrastructure, investment planning, and cost estimation for all involved in shortsea shipping.

Paul Brewster, representative of the Irish Maritime Development Office (IMDO), highlighted that by using the concrete case of Ireland. Ports and shipping handle around 90 percent of Irish trade. Great Britain is considered to be an essential land bridge, particularly for transporting meat products and perishable goods. If a hard Brexit hinders or blocks this trade, the then necessary shift in transport routes could lead to bottlenecks in the Irish ports. Therefore, the Irish are investing heavily in the expansion and digitalization of their ports and networks to avoid possible problems by increasing flexibility and efficiency as well as the speed of transport and handling as a way to compensate for any restrictions. "The transport industry is robust and competitive," Brewster summed up. "No matter what form Brexit may take, we will develop solutions. It is important to minimize the bureaucracy involved."

The European Shortsea Network's (ESN) next annual conference is planned for June 2019 in Athens.



Main actions 2017-2018

- **Intermodality:** SPC Croatia is continuously working on the development and promotion of intermodality in the Croatian transport sector. To this end, SPC Croatia works on development projects funded by EU programmes.

Best Practices

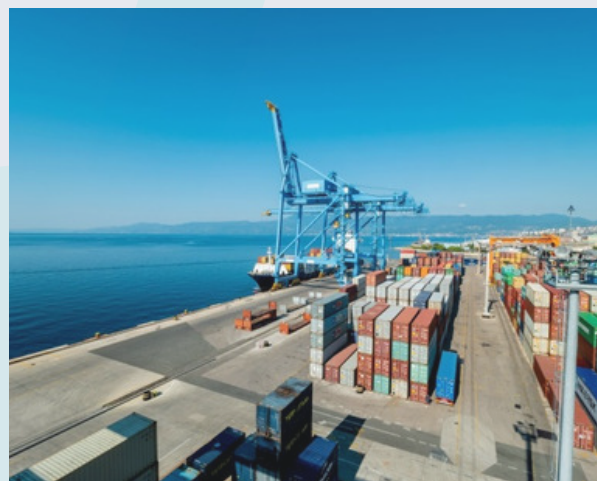
SPC Croatia is a lead partner of the project MultiAPPRO - **Multidisciplinary approach and solutions to development of intermodal transport in region** funded under the Interreg ADRION transnational programme. One of the main project outputs is development of Promotion Network that will encourage establishment of new SSS Promotion Centres into coordinated work of already existing Centres within European Shortsea Network. Furthermore, SSS and MoS promotion action plan will serve as a strategic document for performing common promotion campaign that will be implemented within the project.

Programme and Project initiatives

- SPC Croatia is an active partner on several EU projects where it works on implementation of SSS and intermodal transport activities. These projects are funded under the Interreg ADRION Programme (projects MultiAPPRO and NEWBRAIN) and Interreg Italy-Croatia Programme (Lead partner of the project TRANSPGOOD and partner on the project CHARGE).

Focus 2018:

- **Promotion of SSS and intermodality:** implementation of project activities focused on the promotion of SSS and intermodality, participation at conferences/workshops, publication of promotion material for entire intermodal transport sector in Croatia, keeping an up-to-date website where interested parties may find data about intermodality and shortsea shipping, publishing articles about best practices in these areas.
- **R&D projects:** production of R&D projects, holding consultations and providing support to members.



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Major activities in 2017 And 2018

Ongoing and intensified development of our four-pronged strategy of promotion, training/education, consulting and networking.

Promotion / Marketing

- Fair: SPC joint stand at the world's largest transport and logistics trade fair (total attendance: 60,000) in Munich in May, 2017
- Event: Initiation and Organization of two theme nights and a forum "The Digital Revolution in Shortsea Trade – Dreams and Reality from the Perspective of a Shortsea Operator" "Approaches to Shifting Traffic to Inland Waterways and Railways" "Forum on Special Shipments – Moving More Heavy Loads by Barge"
- Print: Four issues of the 32-page information brochure "spc_AKTUELL" – Wissen wie Wasser Waren bewegt ("spc up to date" – Know-how: moving goods via waterways) – with 3000 copies each
- Topics: "Shortsea shipping plays a pioneering role in sustainable seaborne shipping" "The port as interface" – the role of seaports and inland ports in shifting transport modes "The European shortsea sector" – Trends / markets / innovations / regulations "Container and feeder shipping on the North Range" – Status quo and outlook
- Digital: Weekly newsletter and social media presence

Education and Training

Internships for bachelor and master theses

Frequent lectures by experts at vocational schools, universities and colleges, and various other educational institutions related to logistics

Consulting and Information

Handling projects and enquiries by forwarders and shippers

Cooperation among associations

- In Europe:
 - Membership in the European Shortsea Network (ESN)
 - Associated partner in the INTERREG project EMMA
 - Member of the River-Sea Shipping Committees (RSSC) in the European Barge Union (EBU)

National:

- Participation in 7 national committees on multimodal transport chains

Market Research

Evaluation of data to show the importance of container transport in shortsea shipping among the North Range ports of Antwerp, Le Havre, Rotterdam, Zeebrügge, Bremerhaven, and Hamburg. Results: shortsea shipping accounts for 14.7 million TEU and a 34% share of the total throughput, meaning it is highly important for the North Range seaports.

Analysis of data on the volume of feeder and shortsea shipping. Results: feeder shipping carries 7.8 million TEU and the shortsea-land market accounts for 5.3 million TEU. 1.6 million TEU were handled in so-called interlining traffic. Feeder shipping is a part of shortsea shipping.

Major activity in 2018

Planning and organizing the Third ShortSeaShipping Days and the Annual Conference of the European Shortsea Networks (ESN) with 350 participants on June 20 and 21 in Lübeck. In connection with the conference, around forty companies from the maritime and transport industries were represented at the marketplace trade fair. The event's motto was: "ShortSeaShipping connects Europe's economies and people!" Topics focused on the development of the European market, innovation, and logistics.



Major activities in 2019

Decision to extend our strategy to include carrying out EU projects.

Support and cooperation in the development of the digital information platform Shortseaschedules initiated by the Norwegian SPC

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SPC Germany

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ShortSeaShipping Inland Waterway Promotion Center (spc)

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Focus 2017

- Initiation of a Multisector collaboration platform for the promotion of SSS. Platform gives emphasis on the exchange of information, know-how and the development of common actions and activities for the promotion of a more coherent approach for the integration of SSS in transport chains.
- Study (in process) for the enhancement of the role of SSS in national economy and the cohesion of the country.
- Collaboration with Greek stakeholders for the promotion of river transport potentials.
- BlueGrowth@Aegean: participation to SSS workshops during European Maritime Day 2017
- Participation in plenary meetings of ESSF
- Contribution to the establishment of Marine LNG Network, a multi-sector coalition aiming to generate and widespread knowledge on LNG as marine fuel for Shortsea Shipping.
- Continuous collaboration with Universities in R&D and students' info days



Focus 2018:

- Expansion of activities to include more players along the supply chain
- Strengthen further working and collaborating with Greek authorities
- Completion of the study on the contribution of SSS in national economy
- Continue cooperation with academia

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Main actions 2017/18:

Events:

- The IMDO coordinated an Ireland exhibition stand at the Ten-T Days in Ljubljana in April 2018, where representatives from the Irish ports and from the Department of Transport, Tourism and Sport attended. It was a very successful conference which came at a crucial time for the development of the EU transport system.
- On 18 May 2018, a “Motorways of the Sea” seminar on ‘Understanding the Opportunities from the EU’ was hosted by Shannon Foynes Port Company in Limerick. The “Motorways of the Sea” concept, which has significant funding available, aims to introduce new inter-modal maritime-based logistics chains in Europe.
- In June 2018, the Ocean Wealth Summit in Galway attracted more than 500 national and international delegates from across the marine sector. The IMDO coordinated the session on Maritime Commerce with an expert panel discussion on the opportunity for an International Shipping Services Centre (ISSC) in Cork City, building on the success of the IFSC in Dublin and the Aviation leasing industry in Ireland.
- At the Shortsea 2018 conference, which took place in Lübeck, Germany EU Policy advisor from the IMDO, Dr Paul Brewster, presented on the challenges facing Ireland's maritime transport system to stay connected with Europe.

General Activities

The IMDO is undertaking a number of important studies in 2017/18, these include:

- “The Implications of Brexit on the Use of the UK Landbridge”

The IMDO has undertaken research into likely impacts of Brexit on landbridge traffic and the flexibility that exists within the maritime industry to deal with significant modal shifts.

- “Port Capacity Study”

A consultancy team has been appointed to assess the capacity of Ireland's ports network.

- “IPORES 2017 – an update on Irish Ports Offshore Renewable Energy Services”

The study examines the current capacities, infrastructure, facilities and services that ports must offer the developing offshore renewable energy sector.

- The IMDO also recently launched the 15th volume of the “Irish Maritime Transport Economist” that provides valuable time series tracking the development and performance of Ireland's ports and shipping services.

Focus 2018

- **Connectivity with Europe:** The IMDO is working with Irish ports and shipping companies on the development of trade links between Ireland and Continental Europe in an effort to deal with the expected consequences of Brexit and any negative impacts on Ireland's trade and access to the single market.
- **International Shipping Services Centre (ISSC) in Cork:** The IMDO is supporting the development of the ISSC to create a world-class cluster of international shipping orientated companies centred in Cork Docklands.

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The involvement of SPC Italy/RAM in the European projects related to SSS and MoS

- RAM/SPC Italy is committed to promote the Shortsea Shipping and Motorways of the Sea through the implementation of different projects supporting sea transport, within the framework defined by the TEN-T guidelines for achieving the transport policy objectives set by European Commission.
- These projects include research activity, infrastructural interventions in the core and comprehensive networks' ports of the TEN-T corridors, carried out for the development of the Motorways of the Sea in the Mediterranean region and Middle East.
- Here below the main projects related to the promotion of the Motorways of the Sea and SSS currently managed by SPC Italy/RAM:



Charge

INTERREG Italy-Croatia CBC 2014-2020 Program

Duration period: 01/012018 – 30/06/2019

RAM/SPC Italy participates as lead partner in the Project "Capitalization and Harmonization of the Adriatic Region Gate of Europe" CHARGE". The project intends to promote the combined maritime traffic between Italy and Croatia and develop interoperable technological solutions between the ports involved. The Action foresees the elaboration of an Action Plan for the development of an infrastructure investment planning policy for intermodal transport between the two countries (with particular focus on the Motorways of the Sea) and the identification of possible incentive schemes to enhance the connections of Motorways of the Sea among Italy and Croatia.

Med Atlantic Ecobonus

Med Atlantic Ecobonus is a study carried out in collaboration with the Ministries of Transport of Spain, France, Italy and Portugal, aiming at the development of a coordinated system of incentives supporting the demand for Motorways of the Sea, valid for Atlantic and West Mediterranean markets. This study is based on the incentive Scheme called "Ecobonus", managed by RAM and raised as best practice by the European Court of Accounts. Med Atlantic Ecobonus is a study carried out in collaboration with the Ministries of Transport of Spain, France, Italy and Portugal, aiming at the development of a coordinated system of incentives supporting the demand for Motorways of the Sea, valid for Atlantic and West Mediterranean markets. This study is based on the incentive Scheme called "Ecobonus", managed by RAM and raised as best practice by the European Court of Accounts.





ADRI-UP - Adriatic MoS Upgraded Services

CEF Transport – Call for proposal 2015

Duration period: 01/03/2016 – 20/12/2020

The objective of this Action is to contribute to the development of the Motorways of the Sea in the Adriatic-Ionian region; in particular, to upgrade the MoS between the ports of Trieste, Ancona and Igoumenitsa, and to increase the capacity of the dry-port of Ferneti.

Therefore, the Adri-UP Action aims to develop the port and logistics infrastructures in order to enhance the MoS in the Adriatic-Ionian corridor and create connections with the three corridors of the TEN-T core network: Bac, Scan-Med and Orient-East Med.

This project will contribute to the development of the Motorways of the Sea between Italy and Greece, including the traffic flows from/to

East Mediterranean Countries, with significant benefits in terms of reduction of the road transport negative aspects and qualitative and quantitative development of intermodal connections within the ports involved.

Visit the official website: <http://www.adri-up.com/>



NAPA4CORE - Improving North Adriatic ports maritime accessibility and hinterland connections to the Core Network

CEF Transport – Call for proposal 2014

Duration period: 01/01/2014-31/12/2020

The project NAPA4CORE aims to improve maritime and land accessibility of ports of Trieste and Koper, located on the Baltic-Adriatic Sea and Mediterranean Core Network Corridors. These ports traffic will increase by removing the bottlenecks, and the growing demand for freight traffic from the Far East will be satisfied as well.

The Action addresses the development of the North Adriatic ports of Trieste and Koper in order to increase their capacity (containers and Ro-Ro traffic) and improve their hinterland connections. The construction works in the ports of Trieste and Koper include a Ro-Ro quay (port of Trieste) and a new port entrance (Koper).

For further information: www.napa4core.eu



Mains action 2017

- Support the implementation of the National Strategic Plan for Ports and Logistics;
- Support to private and public entities to exploit the potential offered by the new European financial framework targeting on blending the traditional grants provisions with innovative financial instruments (CEF 2017 Blending Call for proposal);
- Participation to several specialized fairs (SITL Paris, Fruit Logistica Berlin, CEF conference Tallinn);
- Participation in international events related to SSS and MoS;
- Organization of the “Second National Forum for Ports and Logistics” (Livorno, 05th April 2017);
- Presentation of European projects aiming to foster the cooperation among the national SPC’s of the Eusair Region.

Best Practices

Marebonus /Ferrobonus and Med Atlantic Ecobonus project

- Ram/SPC Italy, acting as implementing body of the Italian Ministry of Infrastructures and Transport, has developed and is currently managing , the 2 national incentive schemes aiming at implementing 2011 EC White Paper on Transport objectives Marebonus and Ferrobonus.
- Ram/SPC Italy is involved in Med Atlantic Ecobonus project that has analyzed the viability of new coordinated incentive scheme to support the demand for Motorways of the Sea at Mediterranean level.

Focus 2018

- Organization of the national workshop: “The Motorways of the Sea to Connect Italy” held in Civitavecchia on January 2018;
- Participation in international events and conferences related to SSS and MoS in Europe (European Shipping Stakeholders forum in Varna, Shortsea Shipping Days in Luebeck, Naples Shipping Week);
- Involvement in several specialized fair (Fruit logistica Berlin, Silt Paris, Green Logistic Expo Padova);
- Participation in the Ten-t days 2018 held in Ljubljana;
- Publication and presentation of the book “Connettere l’Italia trasporti e logistica- Per un Paese che cambia” published by Franco Angeli Editore;

**Focus 2018 (continued)**

- Contribution in the elaboration of the ESN newsletter;
- Publication of a monthly bulletin containing data and calculation on shipping with special section dedicated to the MoS;
- Publication of a biannual report dedicated to the MOS containing data and comparison between Italy and MED area;
- Lectures in specialized workshop dedicated to the promotion of SSS (Escola Europea SSS, lessons at Universities, etc....).

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Main Actions 2017/18:

- Malta has continued holding the Presidency of the European Shortsea Network until the end of 2017. An ESN meeting was organized in June 2017.
- MSPC continued to be an active member of the Malta Maritime Forum and thus contributed to the consultations with the Government in the development of public policies that can have a bearing on the Maltese maritime industry.
- MSPC sponsored the participation of 5 students at the Motorways of the Sea Training (MOST) Management course organised by Escola Europea in May 2018 on board of a Grimaldi Ro-Pax vessel on a short sea shipping route between Barcelona and Rome/Civitavecchia.



- Review of local practices that hinder or obstruct the free movement of seaborne cargo on Malta continued.

Best practice:

- SPC Malta has restructured its set up being now led by an executive management team and supported by an administrator providing back office services in one hand and thus improving response, focus and flexibility.
- Malta followed up on the process of establishing ESN as a legal entity under Maltese law and regularly provides information as requested by the local authorities.
- As in previous years, SPC Malta provides the market with information through its monthly newsletters and meetings, the MSPC website, press releases and input with Maltese news in the European Shortsea Network newsletter which was circulated from the Malta office.

Program and Project Initiatives/Participation

- Facilitating and promoting awareness amongst the Maltese transport community in the facilities and opportunities offered by the European Shortsea Network
- Opportunities, through appropriate EU funds, for Maltese interested parties, e.g. shipowners, trailer operators, services providers.
- Giving input and feedback on policies that influence the maritime industry on a local and EU level
- SPC Malta attended and participated in various conferences, seminars and workshops on short sea shipping both locally and abroad.

Focus 2018/19

- SPC Malta intends revamping its website converting it into a more dynamic and international website. As part of this project, the MSPC logo shall be rebranded.
- Continue promoting short sea shipping vis a vis the policy makers
- Give advice on shortsea shipping policy
- Act as contact point for European Union programmes and funding related to shortsea shipping

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Main Actions 2018

Promotional activities

- Published 70 news articles and 9 newsletters. This has generated 80K sessions on our webpages and 325K page-views. The activity is strong between Monday and Thursday, indicating a professional audience –we experience good reach and engagement on shortsea topics

Cooperation with relevant conferences

- SPC has cooperated with relevant Norwegian conferences

Shortsea Schedules (database of shortsea services in Europe)

- Monthly updates of database to keep Schedules current with the latest changes.

Present public statistics to increase market knowledge

- A library of 30 graphs is updated on a regular basis

New Management in SPC-Norway

- New Managing Director in SPC-Norway, Jørn Askvik hired in December

Best Practice

Cool Oslo Shortsea

- The port of Oslo established a project together with BAMA (the largest importer of fresh fruit and vegetables) to Norway called Cool Oslo Shortsea in 2017. The project wants to move fresh-product transport from road to sea. The aim is to include more temperature sensitive products with similar high-quality requirements to transport. By the end of 2018, more than 2.000 transports are transferred, and the customer is now looking to include more destinations with Shortsea.

Cargo transfer from Road to Sea and rail (Drammen Port)

- Green Carrier, Green Cargo, Unifeeder and Ranheim paper has entered into a unique agreement to move substantial volumes from road to rail and sea via the Port of Drammen. The deal ensures that transport of paper from Trondheim, via the port of Drammen and the port of Rotterdam with final destination Wien is done with rail and boat instead of a truck. As a result of the new agreement, truck kilometers from Ranheim factory to the publisher in Wien goes from 2.400 kilometers to only 24 kilometers.

Focus 2019**Promotion:**

- Increase awareness and perception of the Shortsea product through articles and newsletter, utilizing both own channels (web) and social channels (Linkedin and Facebook).
- Cooperate with relevant conferences, ensuring Shortsea is on the agenda, recruit speakers, and hold presentations

Dialogue:

- Regular dialogue with Wareowners, ports, shippers and logistics (3PL) companies identifying opportunities for new Shortsea services to be developed
- **Creating Shipper's Forums:** Organize a set number of focused Shipper's Forums where members can work together to improve their cargo flows. The forums can also support the government in its efforts to shift cargo.

European Cooperation:

- Further develop the established cooperation with SPC-Sweden
- Active participation in the ESN network exchanging best practice, strengthen cooperation, identifying strategies to further support the shift from road to sea
- Evaluate the opportunity to arrange Shortsea Shipping days for ESN in Scandinavia (cooperation between SPC-Norway and Sweden)

Shortsea Schedules:

- Establish Shortsea Schedules as a European database for Shortsea shipping routes – create google flights for the Shortsea segment. The sole purpose is to make information readily available and make it easier to get in contact with the right shippers/logistics company.

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Main actions 2018:**January 2018**

SPC Poland was the host of traditional New Year's Meeting for 200 guests from the maritime sector attended this event,

March 2018

SPC organized and sponsored Conference "Odra River – Main Factor of the region's development"

April 2018

SPC organized and sponsored Conference "SEA PORTS 2018"

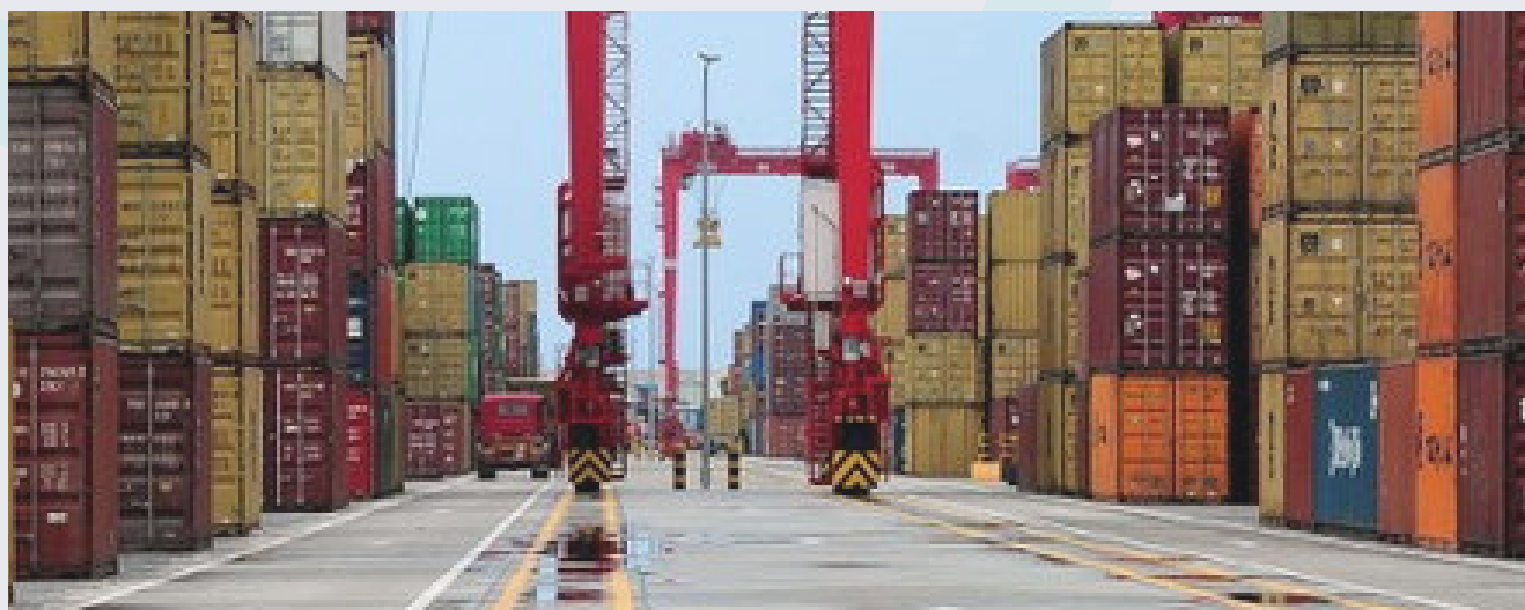
May 2018

SPC Poland continued as main organizer of an annual "Herring Meeting" gathering over 2400 representatives of seaborne industry from all over the world

September 2018

World Maritime Day – SPC organized and sponsored traditional meeting on board of the river boat for 100 participants where various presentation, speeches relating to shortsea, ports and logistics were given

SPC Poland was also active in the promotion of the SSS via local media as well as in supporting various initiatives and projects.



Focus 2018:

- Maintaining an active role of the SPC and encouraging its members to promote Short Sea Shipping
- Strengthening good relationships with other maritime organizations, ports, shipowners and logistic operators
- Working on the improvement of the website contents
- Securing financial support of SPC Poland
- Acquiring new members

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X Congress of Portuguese Language Ports

The X Congress of Portuguese Language Ports, an initiative of APLOP, was held in Lisbon, on September 11 and 12, 2017.

The Management of the Agency was present and developed several contacts for the presentation and promotion of its activities, namely the training ones.

XT&N CARGO Awards - Best Short Sea Shipowner 2017

The agency once again sponsored another edition of the TRANSPORTES & NEGÓCIOS T&N CARGA Awards with the award of "Best Short Sea Shipowner" in 2017. As in 2016, the award was given to MacAndrews.

The announcement of winners of the 2017 T&N Cargo Awards took place during a dinner that gathered more than 150 guests at the Crowne Plaza Hotel in Oporto, on November 16, 2017. The prize won by MacAndrews was presented to a representative of the shipowner by the executive director of Shortsea Portugal, Eduardo Bandeira.



Conference MOS 2017 – “AD-HOC” INDUSTRIAL WORKING GROUP FOR THE DEVELOPMENT OF MOS

The Agency participated, on November 20 and 21, 2017, in the port of Barcelona, at the first conference of this working group.

Several topics of interest to the MoS-related industry were addressed, and included, among others, Brian Simpson, EC Coordinator for MoS, and Wojtek Sopinski, Advisor to the EC Coordinator for MoS.

APTMCD is now Intermodal Promotion Center Portugal, or Intermodal Portugal

In line with its statutes, updated in 2015, with the reality of the market and with its most recent activities, APTMCD decided to extend the scope of its brand to be referred to as Intermodal Promotion Center Portugal or, more briefly, Intermodal Portugal.

While promoting its initial objective, Short Sea Shipping, the transport chain whose maritime component is made through the SSS is the Agency's new focus.

With the recognition of this reality and the adoption of a brand that corresponds to its corporate purpose, the Agency will focus on promoting the integrated mode of freight transport that corresponds to the most efficient solution at the service of economic agents and citizens.

Conference APTMCD 2018 – SSS and Intermodality

The Intermodal Promotion Center Portugal promoted the first Short Sea Shipping and Intermodality Conference, in partnership with TRANSPORTES & NEGÓCIOS, on March 22, 2018 in Oporto.

The event, which marked the beginning of a new phase in the life of the APTMCD, which is more focused on the intermodal / multimodality challenge, in line with the strategic options announced by the European Commission, integrated the program of the Maritime Transport Seminar promoted by T&N.

The theme of the SSS and Intermodality was addressed in two panels: the first panel was dedicated to the "Load: demand and supply" and in the second was discussed "The role of institutions: public and private."

In order to encourage the widest possible reflection, Intermodal Portugal and T&N have invited representatives of some of the main national stakeholders, including port administrations, shippers, road hauliers, railways operators, logistics operators, ...

The Conference also served for Intermodal Portugal to present its new image and its renewed purposes.

SSS Days 2018

The third edition of Shortsea Shipping Days was held on June, 20 and 21, 2018 in Lübeck, Germany. The APTMCD was represented by the Executive Director, Eduardo Bandeira.

Taking place every two years, the Shortsea Shipping Days have already gained their place as a meeting point for the European players involved and interested in the development of shortsea, in a logic of integration of the different modes of transport in the logistics chains.

At the same time, a meeting of the ESN was held on the 21st, with the participation of the SPC present: Portugal, Spain, Greece, Malta, Poland and Romania.



15th Conference on Maritime Engineering and Technology, organized by the Instituto Superior Técnico (IST) and by the Portuguese Order of Engineers

The APTMCD participated in the session on "Maritime Transport and Logistics", held on 9th May 2018 at the IST Congress Center.

On that occasion, the Executive Director of the Agency, Eduardo Bandeira, gave a presentation on the "Overview and challenges of the sector of Shortsea in Portugal" and answered questions raised by the assistance.

New APTMCD members

In the last six months APTMCD has four new members: MEDWAY, TARROS Line, PORTUSLINE Containers International (PCI) and PATINTER.

MEDWAY is the leading Portuguese rail freight operator and is owned by MSC. Significant part of its activity is carried out in the transport of containers to and from the main national ports, in a logic of complementarity with the maritime transport that more recently is extending to the neighboring Spanish territory.

TARROS is an Italian ship owner dedicated to the SSS, which since 2011 has been calling the port of Setúbal and has recently extended to the port of Leixões its pendular service connecting the Mediterranean and North African ports.

PCI, which is part of the Sousa Group, is a reference in the domestic market. It operates regular connections between Continental Portugal and the Autonomous Regions, Morocco, the Canary Islands, Cape Verde and Guinea-Bissau.

In addition, cross trade ensures the regular transport of goods between Northern Europe and the West Coast of Africa, but also with the Middle and Far East and North America and South America.

PATINTER is the first road freight carrier to join the APTMCD, which is increasingly being affirmed as the Intermodal Promotion Center of Portugal.

With its Headquarters in Mangualde, PATINTER is the largest Iberian road freight group operating throughout Europe with a fleet of more than 2,000 vehicles, almost all Euro 5 and Euro 6.

The APTMCD / Intermodal Promotion Center of Portugal takes another step in its strategy of bringing together representatives of all means of transport - and not only - in favor of intermodality. It should also be pointed out that the latest members are from private operators, demonstrating that the market and economic operators are increasingly sensitive and alert to the theme of intermodality.

Contact:

SPC Portugal

Eduardo Bandeira – Executive Director

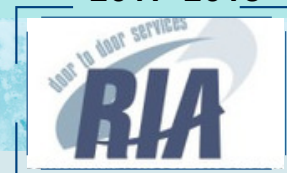
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Main actions

RIA continued to act as an multimodal transport cluster organizing meetings of active transport actors in order to identify best practices in defining a better legal framework, training needs and improved solutions for greener transport and blue growth.

In the last year RIA had an active participation to the transport related projects implemented in Romania (Green Danube, Danube Skills, DAPhNE, Mentor etc.) acting as a stakeholder and giving an appropriate feedback on projects activities.

Two studies where realized (National Report on Port Management Models – Romania, Danube Ports SWOT Analysis Romanian ports), as deliverable for DAPhNE Project, financed under Danube Transnational Programme.

As one of the actors involved in training of young generation RIA organized activites related to promote blue sector and related professions and to define the new competencies required by the multimodal transport in the actual framework of development.

Best Practices

In the last year RIA had an active participation to the transport related projects implemented in Romania (Green Danube, Danube Skills, DAPhNE, Mentor etc.) acting as a stakeholder and giving an appropriate feedback on projects activities

Program and Project initiatives / participations

RIA participated into national and European (Joint Short Sea Shipping and Motorways of the Sea Focal Points and SPC Meeting –Brussels, European Shipping Day- Varna, Short Sea Shipping Days -Lubeck) activities related to short sea shipping and multimodal transport



Focus 2018:

Contribute to policy making process providing actual data related to multimodal transport sector.

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Main actions 2017

- **Annual Shortsea Conference:** The 2017 Conference “New Challenges and Opportunities for Shortsea Shipping” held in Santander (October 26), brought together about 100 representatives of companies and institutions directly related to the Short Sea Shipping (SSS). The conference topics were:
 - New environmental regulations for maritime transport: Ways for compliance.
 - New freight road transport European regulations: is SSS the solution?
 - Uncertainties and potential effects of BREXIT on SSS
 - Med Atlantic Ecobonus Project.
- The Association of Naval and Oceanic Engineers of Spain awarded SPC Spain the 2016 Award as the “Best Company or Institution related to the Naval or Maritime sector”.
- Participation in ESSF’s plenary meetings

Promotional Activities

- Holding five conferences in different Spanish cities to promote maritime – land intermodality, focusing on shippers, logistic operators and hauliers.
<http://www.shortsea.es/index.php/documentacion/jornadas-spc-spain>
- Weekly newsletter with SSS related news. <http://www.shortsea.es/index.php/prensa/newsletter>
- SPC Spain’s presence in specialized media with articles and interviews.
- Continuous website updating

Knowledge & monitoring of the Short Sea Shipping activity

2017, SPC Spain launched two issues of the Spanish Shortsea Statistical Observatory, 2016 Annual Edition and 2017 first half.

<http://www.shortsea.es/index.php/observatorio-estadistico>



Best Practice

Motorway of the Sea Motril - TangerMed by FRS

The freight line that the shipping company FRS launched in January 2016 to link the ports of Motril and Tanger Med, is now a Motorway of the Sea with a daily departure from each port, and a 7-hour journey. More than 15,000 trucks used this MoS to link Morocco and EU in 2017.



Focus 2018

- **Training Activities:** To promote maritime – land intermodality, Spanish General Directorate of Land Transport granted funds to the SPC Spain to develop five training programs in 2018 focusing on shippers, logistic operators and hauliers.
- **Knowledge & monitoring of the Short Sea Shipping activity:** During 2018, SPC Spain will launch two issues of the Spanish Shortsea Statistical Observatory, 2017 Annual Edition and 2018 first half.
- **Cooperation with Public Administrations:** participation of SPC Spain in the Logistic Forum of Ministry of Development, and in the Port Services Observatory of Puertos del Estado, cooperation with the Directorate General of Customs, etc.
- **Recruiting** new members

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Activities of the Swedish Maritime Forum

There is a broad political ambition in Sweden for more freight to be transported by rail and shipping to reduce climate impact and congestion problems. Despite one of the longest coastlines in the EU, shipping is used to a lesser extent in Sweden when compared to other European countries. Shipping has unlike road and rail available capacity. Short sea shipping between Swedish and European ports has the greatest potential for transferring goods from land to sea, according to a recent public investigation.

The Maritime Forum is a Shortsea Promotion Center (SPC) aimed at promoting the transfer of freight shipping. The Maritime Forum has resumed the work with SPC. We work in a project to engage the transport buyers and short sea shipping operators such as shipping companies, ports and freight forwarders in a closer dialogue to create cooperation. In November 2017 the Maritime Forum released a report about the attitudes of transport buyers regarding shortsea shipping.

Based on the report and the progress of the project The Swedish Transport Administration's decided to give a grant for non-profit organizations to support the Maritime Forum's project to create synergies between shipping actors and transport buyers. The idea is that the benefits of shipping as a cost-effective means of transportation can be used by companies to a greater extent by matching import and export flows.

The Swedish Maritime Forum is as well a project partner of the EMMA project, which is funded by the Interreg Baltic Sea Region Programme 2014-2020. The aim of the project is to support integrated territorial development and cooperation for a more innovative, better accessible and sustainable Baltic Sea region.

The EMMA project aims at tackling the challenges and opportunities focusing on inland- and river-sea shipping. Especially increasing the modal share of inland- and river-sea shipping to, from and between Baltic Sea Region countries, fostering a better integration of inland- and river-sea shipping in the BSR transport chains and the EU Strategy for the Baltic Sea Region.

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Main actions 2018

SPC Turkey's secretarial duties have been undertaken by the Istanbul & Marmara, Aegean, Mediterranean, Black Sea Regions Chamber of Shipping (IMEAK Deniz Ticaret Odasi) as being the promotion centre's secretariat. Our yearly industry oriented educations/seminars, which of these most topic subject given to our members such as follows;

- Ship Recycling & Inventory of Hazardous Materials (IHM)
- Implementation of EU MRV Regulations
- EU Emissions Trading System,
- Port State Control Inspections (Awareness and Preparedness)

Best Practices

Participation of European Shipping Industry Stakeholders Shipping Forum-High Level Director's Conference- 3-5 May 2018 Varna, for dialogue and debate on the next European Maritime Transport Strategy 2019/2028;



Focus 2019:

- 2019 educational agenda to be followed on basis subjects as industry topics.
- Turkish coaster fleet renewal Project introduces a sustainable structure for shipping, shipbuilding, marine equipment industries and employment with serious upside potential.
- Cooperation with Delegation of the European Union to Turkey in order to funding green shipping industry.

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