



Annual Report 2008



European Shortsea Network
www.shortsea.info



Foreword



In 2008, one new Shortsea Promotion Center (SPC) has joined our effort to promote short sea shipping and intermodality in Europe. We are pleased to welcome Turkey as an associated member of the ESN in 2008.

ESN now has 21 SPCs working together to move transport off congested roads throughout Europe. The actual resources and activity vary from country to country. Our limited organization and lack of financial resources are still very critical. This Annual Report gives a good overview of the main activities and successes in the different SPCs.

In 2008 SPC Portugal (first 3 months) and SPC France (9 months) did a tremendous job leading the ESN. A number of important initiatives were made and events organized. The key joint event was the DG-TREN/"Focal Point" meeting in Brussels last April.

The main focus of the individual SPCs is to serve its national contributors and members. Some SPCs have stronger financial resources and therefore achieve more. They are shining examples of what can be done with strong support from national governments and industry players. We sincerely hope that nations that have provided only modest support in the past will be able and fully motivated to help pay their fair share this year and in the future. ESN sees a number of opportunities for stronger collaboration among the SPCs on European level. These opportunities will make it easier to realize EU ambitious objectives of increasing the share of transport by sea, river and rail. Jointly, our collective knowledge and broad network of contacts are second to none. Shared ESN efforts will make shortsea and intermodal alternatives more competitive. A main focus for ESN this year is therefore to find financing for our joint ESN initiatives. Mutual promotion, branding, news services, conferences, projects, databases, web pages etc are examples of such activities. The use of standardized XML messages for eFreight and pan-European training in the European School of Short Sea Shipping show that joint activities can be fruitful.

As Chairman of ESN, I am proud to see all action performed throughout Europe to move cargo to transport alternatives that are more friendly to the environment. Our network is strong and we will develop it further. Together we can really make a change! I humbly thank all ESN members for their contribution to our joint European efforts.

SPCNorway
HansKristianHaram
Chairman of ESN (01/01/2009-30/06/2009)



 = Member of the European Shortsea Network (ESN)





SPC Belgium



In 2008 the SPC Belgium has celebrated its 10th anniversary. The jubilee was marked by the launch of our new corporate identity and by the organisation of several events during the year well covered by the press.

We organised three races between a ship and a truck. The results of this race showed that SSS has not only proven to be clearly cheaper, it also scored points in the field of transit time, return freight and tracking & tracing. SSS also puts up a good performance as far as CO₂ emissions are concerned. As expected, it does less well with regard to SO₂, NO_x and fine dust.



In October the workshop "The SME and its export/import in the shortsea area" took place. During this event the very first Shortsea Awards were handed out. In the future it is our goal to continue to focus on the SME as an important target group and to help them choosing for shortsea shipping.

To improve the influx and the level of training, we invited the Logistics colleges and their students to participate in the shortsea and maritime logistics course which the Escola Europea de Short Sea Shipping (2E3S, in short) organises on board a ropax that commutes between Barcelona and Civitavecchia or Genoa. It is our aim to continue support these kind of courses.

The concept of 'Flanders Port Area' was born. It is the name of the Flemish port region that comprises the four maritime ports (Antwerp, Ghent, Ostend and Zeebrugge). 'Flanders Port Area' is used as a brand name in order to position the ports in the wider European and global environment, i.e. as a Flemish port region alongside other European port regions. This 'Flanders Port Area' project allows Flanders to coordinate the promotion activities of the four Flemish ports abroad, thus allowing Flanders to promote all the assets of the ports located in this single region.

The Shortsea Promotion Centre Belgium participates in this initiative. In the working group we contribute our expertise and promotional activities to give design and content to the promotional policy of the ports within the Flanders Port Area. On Saturday 5 July the Flemish Port Day took place for the first time within the framework of the project. A great number of public events were organised in each of the four Flemish ports.

An initiative of the Flemish and Dutch government resulted in an extensive Northsea Taskforce for Motorways of the Sea to attract proposals out of the market. The Esbjerg-Zeebrugge connection was submitted to the European Commission at the occasion of the first official call in 2008 and is under evaluation. The second call of the taskforce however did not generate any proposal.

Despite the disappointing economic reports, the four Flemish ports, taken together, show positive figures. As far as tonnage shipped by shortsea is concerned, they recorded a growth of 3.49% compared to 2007. In 2008 about 133.77 million tonnes of various shortsea cargo was handled in the 4 Flemish ports. Since the promotion centre started collecting those figures in 1999 the tonnage of the shortsea mode has risen by 51,11%. The share of shortsea in the total tonnage of the ports has increased slightly from 50.09% in 2007 to 50.11% in 2008.

Thanks to the 100% financing by the Flemish government we can continue our existence as a neutral, non commercial intermediate party and the expansion of our knowledge, experience and network.





SPC Bulgaria



Intermodal & Shortsea Promotion Centre

SPC Bulgaria is a non governmental, non profit and neutral organization established in 2004 by main branch organizations: Bulgarian Ship Owners Association; Bulgarian ShipBrokers and ShipAgents Association; Bulgarian Association of Forwarders and Logistics and with approval of the Ministry of Transport. SPC Bulgaria acts also as a Co-modality Promotion Center.

European level activities: SPC Bulgaria is forming its policy, plans for development and activities in accordance with directives, programs and concepts of European Commission - above all with the guidelines for extending activities of SPCs toward Co-modality promotion. SPC Bulgaria participates actively in discussions and meetings with the Commission – FOP s / ESN meetings, as well as in Internet consultations with the Commission on important transport programs and concepts.

Co-modality: SPC Bulgaria supported by DG TREN, EACI, as well as by UIC, FIATA, UIRR, EIA, ECSA, ESN, EFIP, organized for a third time in succession Balkan Co-modality Conference 2008 in Sofia. More than 30 prominent speakers and 150 companies' representatives participated in the conference.

Motorway of The Sea: SPC Bulgaria proposed to DG TREN the formation of a separate 6th Black Sea MoS Region arguments were accepted and since the middle of 2008 a 6th European MoS region -Black Sea Region figures in DG TREN Directorate B's documents. SPC Bulgaria contributed to arrange the Black Sea MoS Working Group and during the Balkan Co-Modality Conference 2008, conducted a special meeting with the East Mediterranean MoS Working Group.

Marco Polo II: SPC Bulgaria organized together with EACI- the Marco Polo Program Team- a special workshop and meetings for the promotion of the MP Program in Southeastern Europe during the Balkan Co-modality 2008. Three projects of Bulgarian companies INTERSHIPPING Ltd. - a COMAT company, FANTI G and BDZ Cargo were approved by the Marco Polo II call 2008.

Shotrsea Shipping: SPC Bulgaria supported by IMO, IMRF DG TREN and EMSA organized the first Bulgarian Maritime Day 2008 - The Maritime Safety and Maritime SAR Conference on the improvement of the Short Sea Safety, Maritime Safety organizations and Maritime SAR operations in the Black Sea. The conclusion and recommendations were submitted to the main European/ International organisations. The second Bulgarian Maritime Day will be held in October, 2009 in Varna.



European Shortsea Network: SPC Bulgaria has also as a priority in its activities the improvement of European Shortsea Network functioning as well as cooperation between different SPCs in the fulfillment of their work on a European level.

PROPS Project: SPC Bulgaria participates in PROPS Project -Promotional Platform for Shortsea Shipping and Intermodality. The realization of the PROPS Project will reinforce the role of Short Sea Shipping and SPCs in accordance with European Maritime Strategy until 2018.

Black Sea: SPC Bulgaria cooperates in the organizing of the new ferryboat link between port Varna, Bulgaria and port Caucas, Russia and its connecting with port Trabzon, Turkey. SPC Bulgaria initiated and continues working on the establishing of new SPC's in Russia, Ukraine and Georgia.

EU Partnership: SPC Bulgaria interacts with leading European Associations- ECSA, UIC, UIRR, INE, CER- in its activities to promote short sea shipping, inland waterway and railway for implementation of the European co-modality concept.

National level activities: SPC Bulgaria informs online its members and partners weekly on Commission activities, European transport programs and action plans. SPC Bulgaria is working in close cooperation with main branch associations (shipowners, shipbrokers, freight forwarders) and with main Bulgarian companies with "Green transport" potential of extension and implementation of Co-modality concept. More than 50 very important companies from BG transport community are involved in this promotional campaign. SPC Bulgaria stimulates establishment of Bulgarian Combined Transport Council to the Ministry of Transport (EA Railway Administration) as well as of Danube Transport and Logistics Council. SPC Bulgaria cooperates with the Ministry in the outlining of National Integrated Maritime Policy.



SPC Croatia

Short Sea Shipping in Croatia in 2008 was mostly present as feedering. As a matter of fact, all big Croatian ports (Rijeka, Ploče, Split and Zadar) were connected with HUB terminals of the central Mediterranean by means of feeder lines.

Feeder lines have thus been operating between Croatian ports of Rijeka, Ploče, Split and Zadar, and Gioia Tauro, Malta and Taranto.



We have focused our activities on informing Croatian transport sector on regional and EU initiatives using direct and indirect methods. Within that, we have organised many workshops including Adriatic-Ionian Initiative Meeting which resulted with several project proposals that will be candidate on upcoming IPA and Marco Polo II calls.

Accordingly, SPC Croatia is acting as a coordinator of transport sector related EU funds for Croatia and actively supports development of project proposals.

Due to European Commission recommendations we have launched in 2008 "Bottleneck exercise" which will contribute to increase efficiency and future development of SSS services and intermodal transport system in general.

We are actively involved in INTERREG III project the objective of which is to make a general plan for SSS development in Croatia and a web based liner database. SPC Croatia has arranged publication of a number of expert papers in Croatia on Short Sea Shipping and its promotion.





SPC Cyprus



SPC Cyprus was established in 2006 with the initiative of the Cyprus Ports Authority as a non-profit organization.

During 2008, meetings were held with various stakeholders in order to create awareness of the EU's policy on short sea shipping, of the ESN and its objectives as well as of the Cyprus Shortsea Promotion Centre, its objectives and potentials.

During the year under review all efforts were concentrated on the promotion of the Centre's objectives among the local shipping industry. Emphasis was also given to the promotion of shortsea services as well as of the shipping and ports industry initiatives aiming at expanding further maritime transport.



Moreover the Centre's website is constantly updated thus allowing the Centre to promote itself in a more coherent and systematic way. SPC Cyprus is also closely cooperating with the Cyprus Ports Authority in relation to the promotion of the Motorways of the Sea in the East Mediterranean. Our Centre was also involved in the MEDA MoS project and particularly in the meetings that were held in Cyprus between the MEDA MoS representatives and the local shipping stakeholders in an effort to form projects for the enhancement of existing shipping connections and the introduction of new connections between Cyprus and other Mediterranean countries



Several promotional activities were held for the promotion of Cyprus ports industry and the ports infrastructure development programme, in an effort to promote further the use of Cyprus ports as transshipment hubs.

SPC Cyprus will continue to work hard together with its members and other stakeholders in an effort to consolidate itself as the focal point for the promotion and improvement of short sea shipping links in Cyprus and to augment the maritime sector contribution to the local economy and Cyprus's cohesion with Europe and its neighbours.





SPC Denmark



Shortsea Promotion Denmark is managed by The Maritime Development Centre of Europe (MDCE), as part of a joint office management with The Association for Promotion of Danish Shipping, The Danish Society for Naval Architecture and Marine Engineering and the Danish Society of Transport Economics (TØF).



Shortsea Promotion Denmark has no public funding but MDCE is still investigating the possibilities for securing more funding to facilitate more activity and awareness for Shortsea shipping of goods.

The Shortsea Promotion Denmark is managed as a maritime network under the control of MDCE. There has been several meetings in 2008, especially with the subject of promoting the Marco Polo program and investigating possible new Shortsea routes.

In 2008 MDCE together with TØF arranged and facilitated a one day Marco Polo & Motorways of the Sea seminar. Denmark has participated and been active in the European Shortsea Promotion Networks meetings.

The Department of Maritime Research and Innovation (MFI) at the University of Southern Denmark is performing research on Shortsea Shipping and Intermodality. They participate in the network meetings.





SPC Finland

SPC Finland

SPC Finland is hosted by the Turku University Centre for Maritime Studies (CMS) unit in Pori. The activities of the SPC were extended in 2008 into promotion of shortsea shipping and intermodality. The aim of SPC Finland is to develop shortsea shipping and intermodal transport solutions that combine shortsea shipping with rail, road and inland waterways. SPC Finland's strategy is directed by the Executive Committee. SPC Finland receives strong support from the entire intermodal transport chain including maritime, road and rail operators. SPC Finland is a neutral channel of influence between industry and authorities, and it makes statements on legislation in preparation in the field of maritime transport in Finland and in the European Union. SPC Finland was one of the demonstrating SPCs in the European Commission supported project CIPROC during the first half of 2008.



Information dissemination and events

The aim of promotion and information dissemination was to introduce the concept of intermodality for the target groups. The content of SPC Finland's website www.shortsea.fi and monthly e-mail newsletters were renewed to include information on intermodal transportation. SPC Finland published information material on intermodality: a new brochure on Intermodal Transportation, a Fact Sheet on Intermodal Finland and a newsletter on Maritime Transportation and Environment. SPC Finland is a contact point for Marco Polo in Finland in co-operation with the Ministry of Transport and Communications.

Seminars and workshops

The events during the first half of 2008 were arranged as part of the CIPROC –project to develop the fluency of the intermodal transport chain. Towards the Common European Maritime Space –seminar was arranged on April 8th, 2008 in Helsinki, in co-operation with the Ministry of Transport and Communications, Customs and the European Commission.

The aim was to discuss impacts of the Commission initiative on Common European Maritime Space without Barriers. Maritime Environmental Regulations and their Applications were discussed in workshop on June 4, 2008 in Pori. The event was also a part of SPC Finland's action plan in participating to the challenge of saving the Baltic Sea proposed by the cities of Turku and Helsinki. SPC Finland's action plan also contains information dissemination on the Baltic Sea.

Intermodality - economical and efficient transport chain – extension of SPC Finland's activities into intermodal promotion was celebrated in a seminar in Helsinki on October 2, 2008. The seminar was attended by all transport modes and arranged in co-operation with the Ministry of Transport and Communications. The presentations covered current status and needs for development of intermodal transportation in Finland.

Ship owner barometer

The Ship owner barometer concerns Finland's international freight transport, and reports on the ship owners' views on status and on development needs on the branch. SPC Finland publishes the barometer twice a year both in Finnish and Swedish. The publication of the barometer gained a wide publicity on the Finnish media.

Co-operation with the European Shortsea Network

SPC Finland participates actively in the work of the European Shortsea Network. In 2008, SPC Finland participated to the Marco Polo project Shortsea XML. The tasks included promotion and information dissemination of the project in Finland.





SPC France



Presentation

SPC France was founded in January 2000. The Centre is an independent non-profit body serving the interests of its members, and funded by them and other contributors. Our supporters are public and private companies as well as other organizations involved in shortsea shipping and intermodality: shipping agents, ship owners, freight forwarders, road hauliers, inland navigation, shippers, ports, the French ministry of transport, coastal regions, etc.

With limited resource, SPC France operates with a lean team: in 2008 we were 1 full-time employee, and a part-time employee who was also studying. We brought in a student intern to help with the extra work-load that arose during the EU's French Presidency.

French Presidency of the ESN (01/04-31/12/08)

Developing and adopting a single transport document to be used by all modes and all loading units in the intermodal transport chain in Europe was a key priority of our presidency of the ESN.

Simultaneously to our work, the European Parliament adopted a report including a proposal for a single transport document and a uniform liability regime.

As we were "spreading the gospel", the EU Directorate for Transport and Energy issued a consultation in order to collect the views of all stakeholders in the transport chain. Feedback is coming in and we hear the lawyers are busy editing the final version.

A few notes on what we've been up to:

- We hosted the Final Shortsea XML Conference in Paris. More than 100 attendees were present.
- SPC France was also present with a stand at the Maritima trade fair.



- Sea-river shipping is also part of shortsea shipping and must be developed. To do our part to help raise awareness, we organised the FIRST EUROPEAN SEA RIVER SHIPPING DAY. More than 180 people attended after the scramble for seats we had standing room only!
- As President of the ESN, SPC France provided a speaker at Balkans Co-Modality conference in Q408

SPC France with its Members

In 2008, we maintained the weekly electronic newsletter to our members and we received lots of useful feedback from them. In addition, we launched an initiative to promote short-sea shipping awareness and interest through a series of conferences, meetings and round tables. The events have been picked by a number of specialized and general interest magazines and newspapers.

Our goal is to stimulate inquiries to SPC France as well as to serve as the clearinghouse for members' concerns and issues, regarding EU initiatives and programmes which affect our members. Maritime and intermodal issues in the EU are obviously at the forefront of the minds of those who contact us, and we fielded many questions regarding Motorways of the Seas initiatives, and the Marco Polo programme.

In an effort to reach out to our members and to serve them more efficiently, we began a long-term plan to improve our website. With first-phase completed in mid-2008, the site gets more and more traffic every month - we had more 20 000 page views in December 2008. By striving to create an attractive, user-friendly website maintained with worthwhile content, we believe we can increase visibility and ability to reach our goals.

Next Steps

As the time goes on, SPC France and its members are ever more intermodally minded.

Meanwhile, SPC France has started a programme of building partnerships with High Schools and Universities. Last year we organised two sessions of European School for Short Sea Shipping: six universities and 100+ students participated!

Limited funding however, constrains what we can do – even in terms of some of the more critical things we think our members seek and deserve.

We've all got a lot stake here, and a multi-annual sustainable funding is of utmost importance to help us get raise awareness of our sector.

Getting there requires that we continuously update our members' objectives, maintain efficiency in operations and develop sustainable funding.



SPC Germany



In 2008 the German SPC decided to extend its field of activity by taking railway services much more into consideration. Due to the set focus on multimodal transport solutions it expanded its competences on the railway system and intensified networking in this case. Beside this the topic "Hinterland-traffic" became one of the strongest activity-drivers. Related to that SPC Germany gave lectures, organised workshops and got into dialogue with representatives of the German Chamber of Commerce, with the intention to provide information on infrastructural problems of the German Hinterland as well as to present possible solutions.

Another consequence was an even increased inland port relationship management, as the relevance as inland hubs became more and more obvious.

Furthermore SPC Germany enhanced its active part in commissions and organisations to strengthen the idea of multimodal orientation and the waterway system, e.g. as member of the BSK-commission (Bundesfachgruppe Schwertransporte und Kranarbeiten, Federal professional group for heavy load and crane operations) or by taking part in the 1. German Conference to ITS-IT (intermodal transport service – information tool).



An increasing interest for ShortSeaShipping and inland waterborne transport from domestic industries and forwarders persisted also in the elapsed year. In addition membership in the German SPC becomes ever more interesting for enterprises hence the number of private members increased to 30 by the signing of DB-Schenker, leading company in logistics and railway business across Europe.

The new team of the German SPC even finished a technical innovation by presenting an exclusive member area providing detailed information on European intermodal relations and the handling operators as well as on reference projects and market news.

Additionally it installed the English version of its website. The mentioned four major reference projects have been a huge success, as they led to the new membership and to further contacts and enquiries.

Once again presentations and three lectures have been held at German Universities (combined with excursions) to generate an understanding of multimodal related questions and to give an insight in the waterway system. Another result of the curricular activities was a cooperation with the Technical University of Hamburg-Harburg in case of the monitoring of the LOTOS-project (LOGistics TOWards Sustainability) for Tchibo.

Finally the expansion of networking operations in the range of politics and economy took place as SPC's daily business and built the solid base for interesting modal-shift projects and discussions with companies of industry and commerce.

SPC Germany will keep its focus on the integration of rail- and waterway services into European supply chains without any kind of discrimination in choice of mode or service provider. It considers to establish a service of multimodal education by offering workshops which give interested people a possibility to become prepared for multimodal topics.

Due to the necessary gain of revealed importance of sustainability and environmental interests a common event with B.A.U.M. is planned in September 2009. The "Bundesdeutsche Arbeitskreis für Umweltbewusstes Management e.V." (German Environmental Management Association) is European business community's largest environmental initiative.

Important Key figures

The annual number of about 80 individual enquiries from shippers and forwarders and the major projects led to an aggregated avoidance of 791.800.000 tkm and to savings of 51.180 t CO₂ on European roads.



SPC Greece



EU approach on SSS

Although the recent proposal, "European maritime space without barriers" aims on eliminating some customs hindrances, the overall approach of EU towards SSS is downgraded while the European shortsea fleet is shrinking and ageing.



Non EU registered vessels are expanding their market share in intra EU sea transport and the European ship officer, is now an endangered specie. The imminent approval of the 60 tonnes registered gigatrailer will further worsen the situation.

The Greek SPC is opposing these developments through national and community bodies and fora. The European Union should become aware of the implication of its political choices for the future.

Conviction of the biggest Greek port for anti-competitive behaviour

After four and half years of deliberations the Greek Competition Commission has found the Port of Piraeus authority and one major liner company guilty of anti-competitive practices following a protest of a Greek shortSea operator. This has been the only case in Greece where a public entity has been convicted for unacceptable practices against a private company and for this reason it has now become a test case for the maintenance of fair relations between ports on one hand, and users on the other, in the full spectrum of port services i.e garbage/slops, mooring, storages e.t.c.

Relations with DG TREN

The Greek SPC has been active in pushing forward and negotiating the terms under which the European Commission would provide support for all members of the European Short Sea network on the basis of compensation for services rendered. The Commission has been slow in accepting this kind of mutuality as a basis for discussion and to date the matter is still open. The practice of expecting things to be done for free and in absence of a budget must come to an end otherwise many members of the European short Sea network will face the prospect of closing down.

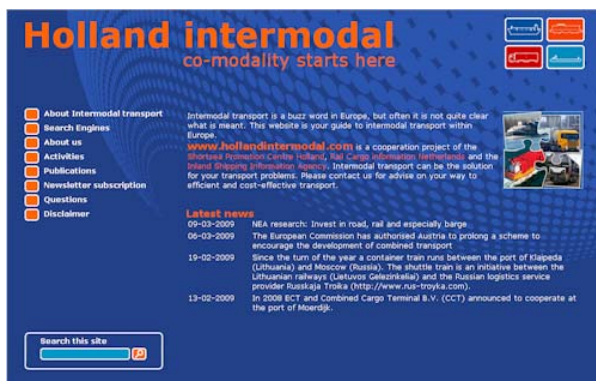


SPC Holland



Cooperation between the promotion centres for barge, rail and shortsea, started in 2007, was the order of the day in 2008. The directors of the three centres met on a regular basis to discuss the future, form of the cooperation and agreed on joint actions.

The cooperation went into second gear this year. The more intensive cooperation was made possible through funds from the EU funded project CIPROC (Co-operative Intermodal Promotion Centres). This has resulted in two intermodal publication, a renewed website www.hollandintermodal.com and we presented ourselves and promoted intermodality at various gatherings and workshops. This project demanded a lot of our time, but it was worthwhile.



But the regular activities of the Shortsea promotion Centre were not forgotten, as not all shortsea is intermodal. Also on daily basis news items were added to our homepage and the data on brokers, terminals in the Netherlands and the company profile of the financial participants were updated. The result is that the number of unique visitors per working day rises from 97 to a record of 120. Though the number of enquiries rose with about 7% till 516 in 2008. However,

number of specific enquiries (shortsea possibilities to certain destination) declined. As country factsheet elicits questions, we will increase the mailings to our primary target group in 2009.

The website www.shortsea.nl is an important means of communication as it is available 24/7. The number of unique visitors rose from 97 to 120 per working day. This increase can be partially contributed to our monthly e-mail News, sent to more than 1500 addresses. Each month after the e-mail news has been sent out, the number of visitors increase above average till about 535 unique visitors.

Bearing in mind the slogan "the youth has the future" we stepped up the cooperation with vocational schools in

transport and logistics. This was in the form of special classes/lectures on shortsea (STC and HRO), as well as students that did some research in comparing service and price between road and shortsea to a specific destination (InHolland).

It is important to keep track of developments in the shortsea sector and therefore quite a large number of shortsea operators were visited. Also potential financial participants were visited and we could welcome Harlingen Seaports, Gex Logistics, Neptumar, Quintiq, Transfennica Nedeland BV, Unifeeder Netherlands BV and Westra Shipping into our circle and later in 2008 Delta Shipping en Mann Lines followed. The Rotterdam Container terminal of the Kramer Group will join us as from 2009 onwards.

However, not all was sun shine and roses in 2008. The financing of SPC Holland causes anxiety in the longer term. We received a letter from the Dutch Ministry of Transport that the subsidy will be reduced after 2009 and completely cease in 2013. As the ministry contributes almost 50% to our budget, we will have to find alternatives. This has been discussed by the Board in 2008 and will be again on the agenda, after the evaluation of our activities by a third part has been finalised.

Seen the continuous demand for our expert knowledge on shortsea and intermodality, we have good hopes that we will find a solution to this problem. After all the demand for a sustainable supply chain is on the increase and shortsea shipping can contribute to this.





SPC Italy



The Italian Shortsea Promotion Center was founded in 2001.

In the last year SPC Italy activities have been focused on the implementation and development of the Italian incentive called ECOBONUS, creating an explanatory pamphlet about the incentive and how to access to it: this pamphlet has been distributed to Italian Association of transports, carriers and shipowner.

This incentive is a reimbursement given to carriers who choose Motorways of the Seas as a valid alternative to road. On January the 31st 2007, the Italian Minister of Transports, Alessandro Bianchi, issued the first executive decree regarding "Ecobonus" and the mapping of routes on profited by it.



Since five years when the law was passed, in fact, the Government predisposed and signed the first executive decree of the law which should unblock about 240 euro million allocated to propel vehicles to leave Italian roads, too engorged, and prefer maritime transports.

Every maritime connections, identified along Italian costs, except for Sardinia, can use the **Ecobonus**. For connection already operative, the contribution to auto carriers will be of 20% of the applied prices, but on new connections, identified through a segmentation of coastal arcs in Tyrrhenian Sea and Adriatic (North Adriatic, central and ionic; north and south Tyrrhenian; between Tyrrhenian arcs and French and Spanish Ports), the contribution will be of 30% of the applied prices.

The contribution value is calculated, as disposed by the *art. 3 co. 1 DPR 205/2006*, on difference between external costs generated by road transports and that of maritime transports of goods on each identified connection.

The contribution about maritime connections with MS' ports is calculated on the basis of the distance in road and maritime's km until the national border.

The decree April 11th 2006 n. 205 ("Reg. on the allocation and supply of stock in hand directed to innovation of goods transport on road system, development of logistic chain and intermodality") sets that enterprises should have these financing with rigorous conditions, or they have to give back the bonus: they have to guarantee a minimum number of 80 trip per year on the same connection and ensure, for the next three years, a road-sea combined quota same as that one they received the bonus the year before.

SPC Italy during last year continued with the newsletter about Shortsea in Italy and Europe, observing the traffic moved in each Italian port, updating the database with all new sea connections, participating to ESN meeting and work.



SPC Ireland



The Irish Maritime Development Office (IMDO) of the Marine Institute is the agency responsible for the promotion and development of Shortsea shipping in Ireland. During 2008, the office continued to play an active role in the pursuit of promotion of shortsea policy in Ireland.

Overview

The domestic shipping and ports services sector in Ireland was faced with a very challenging market and economic conditions in 2008. Operators and ports had to respond quickly to the changing market conditions and did so through reducing capacity, changing schedules and frequency but despite this there were 2 new entrants to the market in 2008. As a small open island economy, Ireland is heavily dependent on its short sea maritime services to connect it to the global market place. Traffic volumes through Irish ports decreased in 2008 as Irish companies involved in international trade were faced with ongoing economic challenges. Between January 2008 and December 2008 total capacity decreased by 16 per cent. Between January and September capacity fell by 12 per cent with the majority of readjustments during the summer period. However between September and December available capacity fell by a further 5 per cent. Roro traffic also fell in 2008, with a 6 per cent decline, however capacity increased by 7% with LD Lines and Cobelfret entering the market. There were no major changes in existing roro capacity throughout the year, except P&O taking a third vessel off the Dublin – Liverpool route returning it to a 2 ship operation. In October LD Lines started a combined passenger and freight service between Rosslare and Le Harve. Cobelfret started a freight roro service between Rosslare and Rotterdam and Zeebrugge.

There has been an overall 6 per cent drop in bulk traffic through Irish ports. Both the wet and dry bulk sectors at Irish Ports declined by 4 per cent, is likely attributable to the bulk market being exposed to both the exceptionally high commodity prices in 2008 and the fall off in construction. External factors such as the economic crisis and deepening recession have had a negative impact on volume demand. Passenger traffic, which increased for the first time in four years in 2007, decreased by 6 per cent in 2008, although Ireland is a very popular cruise destination with the number of visitors to the island increasing by 43 per cent in 2008. Some noteworthy highlights for the office during 2008 included:

Market Research & Industry Development

- As part of its statutory remit the office provides expert policy advice on development and co-ordination of shortsea and shipping policy to the Minister and Government officials.

- The IMDO in 2008 published and distributed 8 updated shipping reviews and 3 new reviews detailing traffic, bilateral trade and business between Ireland and other European countries.
- The office provided strategic support to shortsea companies with the development and establishment of new liner shipping services, leading to the establishment of 2 new roro services from Rosslare.
- Over the course of 2008 the office contributed to a number of steering groups on freight transport and ports performance.
- The IMDO published the 5th Annual Irish Maritime Transport Economist.
- The IMDO as a member of numerous EU committees contributed to the 7th framework programme, and contributed to the WTP.
- The IMDO co-organized and co-hosted the European Shortsea Congress Conference in Dublin Castle and Marine Money in 2008 bringing together over 100 top executives in Shortsea shipping and top executives in finance, law, tax and shipping.
- Provided regular market intelligence and data to industry and government.
- The office launched a new online international advertising campaign to promote the advantage of doing maritime business in Ireland.
- Our E-based strategy showed an increase of 13% of visits to the IMDO web portal.
- The IMDO relaunched its website which is available on www.imdo.ie



- All details of information services, and business support are available on www.imdo.ie



ISPC Lithuania



Lithuanian Short Sea Promotion Centre (LSPC) was founded in 2004 and lead by Klaipeda State Seaport Authority. Since autumn 2007 Lithuanian Intermodal Transport Technology Platform (LITTP) <http://www.ccitl.vgtu.lt/en/?id=10168.12510> and Managing institution (Lead Partner) of LITTP - Competence Centre of Intermodal Transport and Logistics (CCITL) of Vilnius Gediminas Technical University <http://www.ccitl.vgtu.lt/en/index.php> have overtaken functions of Lithuanian SPC aiming to be reorganized from SPC to IPC (Intermodal Promotion Centre).

1. Strategic development of intermodality in Lithuania.

1.1. Through sections of the LITTP was developed **Lithuanian Intermodal Transport Research Programme for 2008 - 2013** which highlights main directions and priorities for bringing intermodal character to transport research and cooperation in the fields of road-, rail-, water- and urban transport and environmental protection. The programme was presented for its approval in governmental institutions.

1.2. Increasing co-operation between stakeholders of Lithuanian intermodal transport system.

Every month stakeholders of the Lithuanian intermodal transport system had meetings at the LITTP Council meetings. Additionally to focussed agenda, every meeting was used to discuss tendencies and events in world and European markets, exchange opinions between authorities, transport business and researchers.

1.3. In June 2008 was organized a **workshop** with representatives from various target groups and governmental institutions, analysing **bottlenecks** in intermodality. The main result of the workshop were recommendations to overcome problems of the intermodality in Lithuania, as well as in the South -Eastern Baltic region.



2. Promotion of the intermodality.

2.1. Brochure

Prepared and published a brochure on Lithuanian intermodal transport system in Lithuanian, English and Russian languages as part on the CIPROC project.

2.2. The website

The existing website was extended and linked to the sites of the various modalities, including rail and road transport (<http://www.ccitl.vgtu.lt/en/?id=10168.8422>).

2.3. Factsheet on intermodal transport in Lithuania

Prepared factsheet in English and in Russian on intermodal transport services in Lithuania.

2.4. Distribution of external documents

External documents were permanently distributed to stakeholders, including: documents in intermodal market developments; information on national and EU transport development programmes.

2.5. Database

2.5.1 Establishing and maintaining database on IMT services. Identification of existing intermodal transport services and description of the best practises.

2.5.2. Development of database on shippers.

2.5.3. Database with selection / query options on a country to - country basis (i.e operators and shippers)

2.6. Direct mailing

Mailing and e-mailing to various target groups on: organisation of round table discussions, LITTP meetings, seminars and workshops on topic of promotion intermodality; sending national and EU transport policy documents and letters of communications; dissemination information on intermodal transport developments and innovations; on topic of the preparation of brochure on intermodal transport and etc.

2.7. Promoting best practice (Viking shuttle train)

Information on this intermodal project was prepared and disseminated in various transport workshops, seminars and conferences on the regional and on the European level.

Container train VIKING POSSIBILITIES

**KLAIPEDA
(KTG)**
container terminal
300.000 TEU
per year

ILICHIVSK
container terminal
250.000 TEU
per year

ODESSA
container terminal
300.000 TEU
per year



Shuttle train "Viking"(Klaipeda- Odessa/ Ilyichovsk) is a joint project of Lithuanian, Belarusian and Ukrainian railways, seaport cargo companies, and Klaipeda, Ilyichovsk and Odessa seaports, which was established 3 years ago. The train carries 20 and 40-foot containers as well as semi trailers and trailer-trains (contrailers). It is one of the most successful intermodal transport projects in the Eastern Europe.



SPC Malta



The Malta Shortsea Promotion Centre (MSPC) which was founded in June 2005 is an independent non-profit organisation and is being managed and administered by an Executive Council which includes a representation of all the members.

During the year under review, the MSPC has been quite active primarily by providing feedback to various questionnaires received from maritime journal publications and the public consultation papers issued by the European Commission as part of the development of an Integrated Maritime Policy. The Centre has also continued to develop and enhance its co-operation with other Shortsea Promotion Centres (SPC's) both on a bilateral basis and through its participation in the European Shortsea Network (ESN) meetings.



The MSPC also actively participated and contributed towards the developments of motorways of the sea projects. In fact its members participated in activities related with the MEDA-MOS project, namely in a seminar organised in Malta by the MEDA-MOS team and in further individual discussions with the project team. It has also provided information to the project leaders of the East Med MoS Master Plan and West Med Corridors projects.

In order to continue with its objective and attract more members towards the centre, a number of key stakeholders were approached from the shipping industry providing them with information about short sea shipping and its potentials. In this respect, during the year 2008 the MSPC issued a press release which was distributed to all local newspapers and sent directly to the industry stakeholders. This approach had its positive results as it helped the Centre in its aim to obtain an increase in the number of new members joining the centre during the year.

The MSPC Internet based information service on www.shortsea.org.mt has been popular and the site has been frequently visited during 2008. The information services have reached a high quality standard and have been actively marketed. On the MSPC website one can find information on all regular shortsea shipping lines calling Maltese ports, information for services rendered at the Ports in Malta and news updates; including news on new shipping services, information on short sea events organised both locally and internationally, public consultations and related communications from the Commission and other institutions.





SPC Norway

SHORTSEA SHIPPING NORWAY

SPC Norway has been an associate member of ESN since 2003. SPC Norway is organized under the "Maritime Forum of Norway" umbrella and is mainly financed by the Norwegian Government with some industry support.

Through the "Maritime Forum of Norway" network, comprising approximately 700 companies and organizations from all areas of the maritime sector, we are able to reach a broad audience both nationally and regionally.

EU Policy and ESN

Our main aim is to increase seaborne transportation to, from and within Norway. We can only do this in close cooperation with EU countries.

A secondary goal is that the special circumstances of Norway are taken into account at the European level.

SPC Norway has therefore participated actively with Norwegian comments on the EU Consultation on European maritime transport space without barriers and Motorways of the Sea.

As an associate member, SPC Norway has participated in all ESN meetings and in other conferences organized by members of ESN.

Web site

The main focus of our web site is to give detailed information on transport alternatives to, from and within Norway. Secondly we wish to bring news that are relevant to providers, users and policy makers of short sea shipping. We also wish to keep Norwegian players informed on EU policy issues.

In 2008 we had about 10.000 visits to our web site. On average we generated 4.5 page views per visit.

The most popular pages were those providing general information on short sea shipping, our news section and our new liner service information.

News service

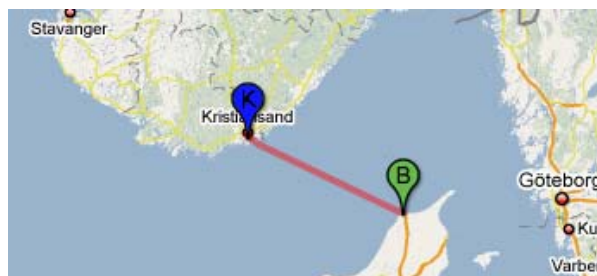
In 2008 we submitted 8 newsletters, which were distributed to about 3.000 persons. The focus of our news service is news related to liner services, schedules, ports and EU policies.

Liner schedules

In August we launched our new liner schedule search function. The following information services are provided:

- Port-to-Port and Door-to-Door search
- Regular Services details with sailing schedules for each service offered by the lines.
- Port and agent details for all ports with regular services to, from and within Norway.
- Short Sea Directory.

The liner schedule lookup has become very popular and by the end of 2008 it generated about 55 page views per day. The most popular pages are the Port-to-Port and Regular Services pages.



Marco Polo

SPC Norway assists the Norwegian Ministry of Transport and Communications with its promotion of the Marco Polo program, which Norway contributes to. Our aim is to increase the number of successful Norwegian applications.

The promotion of Marco Polo has given us hands-on access to new projects planned in Norway and has enabled us to assist in the critical build up of new transport alternatives.

Projects

SPC Norway was a major contributor to "Shortsea XML", a Marco Polo Common Learning action that was finalized last year. As a part of this project we rebuilt our liner schedule database and made it possible to import and export schedule information in Shortsea XML Schedules format.



SPC Poland



Shipping in the Baltic Sea Region is specific by its nature due to a plethora of factors ranging from the seasonal weather conditions and the high volume of marine traffic, through to environmental protection issues. There are several well established MoS intermodal and multimodal connections functioning across the Baltic. All modes of transport serve a heavy traffic of people and goods between the countries around the Baltic.

SPC Poland is actively supporting the EC Transport Policy 2008 -2018 and promoting environmentally friendly modes of transport under our slogan: „*Do more to protect the environment*”. A very important part of our activities is the elaboration of postulates and recommendations with regard to the elimination of bottlenecks.

Referring to a good example of the Italian *ECOBONUS* incentive system we have introduced an *A-1 Highway Tariff* modification in favour of TIR – transport transiting through the Ports of Gdańsk/Gdynia during evening off-peak times (i.e. after rush hour). Another of our initiatives and areas of support is aimed at introducing into TEN-T a *Central European Transport Corridor* (CETC - along the River Odra) with its extension by sea from Świnoujście to Ystad (Sweden).

Co-operation around the Baltic Sea is vital as regards how best to utilize HELCOM, the Baltic Advisory Council, the Swedish Presidency and the individual governments' and non-governmental organizations' efforts towards making the Baltic a safe, secure and barrier-free trading area.

Evidencing the fulfillment of one of the SPC's past postulates is the circulation of an official set of statistics (produced by the Main Statistical Office as from 2007) covering cargo traffic in Polish Ports in terms of shortsea shipping – see: www.stat.gov.pl (the data for 2008 to be available by the end of April 2009).

In the course of the year, the SPC's experts made several presentations, lectures and publications addressed to the port authorities, forwarders, shipowners, ship-agents, rail operators, academics and other industry stakeholders.

A *single help desk* incorporated into the SPC's daily activities and its conversion into an Intermodal Promotion Centre (IPC) dealing with freight logistics, shortsea, intermodal and TEN-T/MoS related issues remains, due to budgetary constraints, a challenge for the future.

The SPC's plan of activities for 2009 includes:

- Support of TEN-T/MoS and MARCO POLO II projects in liaison with the National Focal Point and the maritime industry other stakeholders
- Regular updating of the SPC's Internet page www.shortsea.pl
- Symposium on the “Safe shipping on the Baltic Sea” in Gdańsk on the 24-25th of April 2009 - see: <http://www.prs.pl/page880.html>
- VIIth edition of the Maritime Transport Conference scheduled for to take place in Szczecin on the 14th of May 2008 – see: www.zegluga.szczecin.pl
- a sequence of events aimed at actively supporting a maritime cluster initiative called „Partnership for the Sea” created to promote maritime awareness and a positive image of seafaring and maritime professions;
- in line with the aforesaid we are organising the XVth Baltic Herring Meeting at Szczecin with an anticipated attendance in excess of 2000 - see: www.herring.szczecin.pl



The neutral status of the SPC as a non-governmental organization is being retained and we will continue to offer our expertise and skills in an effort to effectively phase in into the country's strategic programmes the EU integrated Transport Policy for the years of 2008-2018. Finally, we have again secured financial backing to keep the SPC going for the foreseeable future.



SPC Portugal



The Portuguese Short Sea Promotion Centre was established in the end of 2001 under the umbrella of the Secretary of State of Transports. It has several members such as the major Portuguese ports (8), Terminal operators (2), National Railway Company, Shipping Agents Association, Maritime Industries Association, Consultants (2), the Shipowners Association and one University Department.



The Portuguese Shortsea Promotion Centre has also been involved together with the Portuguese Ports, Customs and Ship Agents in the project (started in 2005) of developing a computer network and system allowing all the information to flow safely, transparently and quicker within the transport chain, avoiding several usual bottlenecks which don't exist in the road transport.

During the year 2008 SPC Portugal has been involved in several initiatives both within the country and abroad such as:

- ❖ Coordination of part of a Seminar (Shortsea shipping and the MOS) dedicated to the Maritime Transport in March in Oporto.
- ❖ Organization of a meeting with SPC- Spain and other Organizations to establish an Iberian Short Sea Excellence Center in Aveiro.
- ❖ Participation as a speaker in several Conferences and Events.
- ❖ Coordination of Portuguese group (50) participants in the 2nd Portuguese Focal Gloss course in the European School of Shortsea Shipping.
- ❖ Coordination of the Shortsea Shipping Working Group within ECASBA (European Community Association of Ship Brokers and Ship Agents).
- ❖ Participation in the Committees of Maritime Transport and Logistics within the International Chamber of Commerce.

Finally the Portuguese Promotion Centre has been requested in several occasions by the Portuguese Government and Public Entities to act as an advisor in all aspects related to the transport chain within Europe and logistic solutions.



SPC Spain



The year 2008 has been marked by the process of selection of the projects presented to the call of proposals for Motorways of the Seas between France and Spain that finally has finalized at the beginning of the 2009, giving like result the election of the MoS between Vigo and Nantes-St Nazaire, with prolongation to Le Havre, served by Acciona Trasmediterránea and between Gijón and Nantes-St. Nazaire, served by the partnership CGA, CGM - Louis Dreyfus and Grimaldi.

Spain was chosen by the Coordinator of the European Commission for the MoS as the first country to visit, in a meeting with the Spanish and the Portuguese SPC's, to initiate a tour by different European countries to listen the actors involved in the process of creation of the MoS, that served to elaborate the report presented to the European Commission at the end of the year.



The year, in terms of consolidation in Spain of the SSS, has been very positive. In the North the line of Transfennica between Bilbao and Zeebrugge has increased its level of occupation. The lines of Brittany Ferries between Santander and the United Kingdom have finalized the year with very positive levels of occupation.

In the Mediterranean it is necessary to emphasize the duplication of the capacity of the main lines from Barcelona, with the new vessels of Grimaldi, the Cruise Barcelona and the Cruise Rome, in the line of Chivitavecchia, the new Grande Navi Veloci ships, in the line of Genoa, and the consolidation of the Line to Livorno, also of Grimaldi. In this line it is detachable the process of agreement with Suardiaz Fleet, to give the service a joint form. With it the volume of load in this area has approached the 5 million tons.

Also a new line was inaugurated between Castellón and Marina di Carrara, served by the Italian company Logistec lines, like fruit of the beginning of the project Marco Polo CERAMIC 2.



At the end of the year the Basque Government started up an initiative to stimulate the use of the services of SSS in the country Basque, similar to the Italian ECOBONUS.

On the SPC side it is possible to emphasize the participation in the SIL and LOGITRANS. There they represented the results of the study made by FEPORTS on Requirements of a SSS terminal, as well as the negotiation of an agreement of collaboration with Portugal for the creation of an Iberian Center of intermodal excellence.





SPC Sweden



Maritime Forum, Shortsea Promotion Centre Sweden, is an association of around 100 fee paying members. These members are companies, organizations and authorities such as shipping lines, port companies, shipbrokers, universities, schools, unions, banks and finance institutes, technical suppliers and consultants, shippers, shipping organizations, and other companies related to the shipping industry. The Swedish Maritime Administration is contributing to the short sea promotion activities.

The object of Maritime Forum is to:

- increase knowledge about shipping
- communicate the possibilities and advantages of seaborne trade and transportation
- communicate the advantages of short sea shipping and inland waterway traffic
- highlight the important role for the society and its industry
- highlight shipping as an interesting sector for employment and education
- stimulate openness, co-operation and discussions within the shipping cluster

Main external target groups are politicians, decision-makers, media and young people.

Maritime Forum is working to promote seaborne transportation as part of efficient and sustainable intermodal transportation chains. The Forum is also promoting the environmental benefits of sustainable ships design, along with the efforts to reduce emissions from ships and how sea transportation can contribute to a better environment. Other important topics include the importance of ports, future shipping challenges along with shipping-related EU programmes.



2008

During 2008 Maritime Forum has had a special focus on the possibilities of inland waterway traffic and on organising meeting-places for the shipping cluster in order to stimulate networking, co-operation and common actions.

Maritime Forum organised breakfast meetings at the Swedish Parliament and other activities aimed towards attracting and maintaining the politicians' attention. Maritime Forum also organised a number of conferences and seminars highlighting the shipping sector and its challenges, among others The World Maritime Day Conference, The Stockholm Shipping Day, Climate-smart Transportation in the City and seminars during the so called Almedalen Summer Week for politicians and decision-makers.

The Maritime Forum Newsletter was regularly distributed to subscribers from the whole of Sweden's shipping cluster.



Karin Svensson-Smith, Member of the Swedish Parliament talking about short sea shipping at Maritime Forum's shipping-pub during the Almedalen week, July 2008.



SPC Turkey



The "Short Sea Promotion Center" (SPC - Turkey) was established in 2008 by the Union of Chambers and Commodity Exchanges of Turkey (TOBB), and its secretarial duties have been undertaken by the Turkish Chamber of Shipping (IMEAK DTO).

Our aim is to develop in Turkey the Short Sea Maritime Shipping which is an environment friendly and economical way of transportation and to help its contributing to the Turkish Shipping and economy.

Our Information Center has already started spreading information on the following address: www.shortsea.org.tr

The Objectives and Functions of the Promotion Center:

1. To make research, promotion and information raising activities on the Short Sea Shipping and to provide consulting services to those who want to use this transport mode.
2. To promote the usage of the Short Sea Shipping system and the studies on the maritime logistics.
3. To work on the improvement of the cooperation among the modes of transport.
4. To mutually work to increase Short Sea Shipping trade, traffic and journey intensity among the Promotion Centers and members of the other countries.
5. To make projects on the reinforcement of the infrastructures at ports and terminals, the development of the loading systems and equipments, the optimization of the tariffs and the provision of the standards, and to support the projects already made.
6. To work on the harmonization of the legislation concerning maritime, transportation and customs in our country primarily with the rules of the International Maritime Organization (IMO) and secondarily with the international rules and the legislation of the European Union.

7. To monitor and promote the projects and infrastructure works concerning the formation of the electronic sea routes.
8. To work on the subjects related with the Short Sea Shipping.



Type Of Organisation:

- Private non-profit association

Financial Supporter & Budget:

- Turkish Chamber of Shipping & € 50.000,00

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SPC United Kingdom



SPC United Kingdom

As an island nation, the UK has an enormous coastline per capita ratio. Therefore, the lines are blurred between short-sea, coastal and inland waterways. Freight by Water (formerly Sea & Water) promotes all three collectively so that water becomes a viable alternative transport mode for freight movements in the UK.

In 2008, Freight by Water successfully completed its restructuring process which began autumn 2007. This included a rebranding, the hiring of new staff and the start of the redesign of the SPC's website and water-freight transport database, which are to be completed in spring 2009. As a result of this reorganisation, Freight by Water is now better placed to promote water-freight transportation in and around the UK and to function as a membership organisation which defines and redresses obstacles for the industry and promotes success stories.



Other Activities:

- Published *UK Freight Trends Towards 2018 and Beyond*, our report which examines past and present trends in UK freight and encourages the take-up of water-freight transport.
- Participated in *CIPROC*, an EU-funded project with an aim to expand SPCs' promotional activities to include intermodality.
- Hosted three major membership events (including a two-day *Autumn Regional Seminar* in Bristol) and participated and presented at numerous industry events.
- Obtained abundant coverage in both the national and trade Media.
- Worked with Government to encourage policy initiatives that provide support to water-freight transport in the UK.
- Expanded our membership services to include a weekly e-newsletter, a monthly newsletter and a greater advisory role.





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European Shortsea Network

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