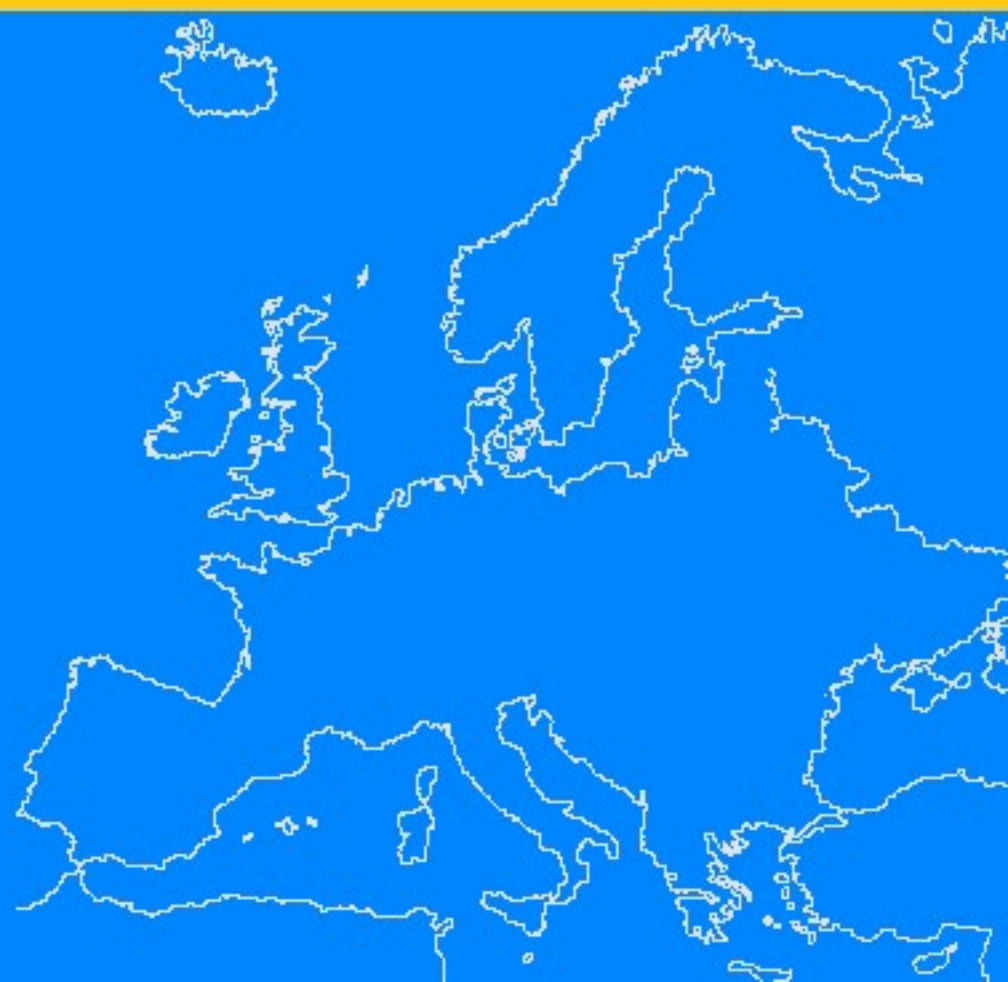




# European Shortsea Network

Annual Report 2004



# Foreword



In front of you is the annual report for 2004 of the European Shortsea Network. The network has grown till 16 members in 2004 and from each Shortsea Promotion Centre (SPC) you will find a short review of the developments and their activities during the past year. Unfortunately two SPC's have been "dormant" for most of last year. A positive sign is that from the 10 states that joined the EU in 2004, already three have expressed interest (Malta, Cyprus and Estonia) to start their own shortsea promotion organization. We hope that we can welcome them to our network during the course of 2005.

ESN is first and foremost a forum for exchange of practical information/experience and the main objective is to enhance the image of short sea shipping in the broadest sense of the word on a European level vis-à-vis the transport buyers at large including forwarders and to encourage, by practical means, a move towards short sea shipping. In 2004, six SPC's bilaterally organised workshops for the transport buyers; Belgium and Portugal, Finland and Poland, and Italy and Spain.

The new internet site [www.shortsea.info](http://www.shortsea.info) was developed further and each SPC has spent a lot of effort in further updating the information in the search engine liner services. This task is huge and more complex than anticipated. However, ESN expects to have all data filled in by the end of 2005.

There are many challenges ahead for the ESN. However, going forward our strength is our shared knowledge. We are well positioned in our goal to be "the" expert source on Shortsea shipping in Europe, from highway to waterway.

Sander van 't Verlaat

Chairman of ESN  
Director Shortsea Promotion Centre Holland

[www.shortsea.info](http://www.shortsea.info) [www.shortsea.info](http://www.shortsea.info) [www.shortsea.info](http://www.shortsea.info) [www.shortsea.info](http://www.shortsea.info) [www.shortsea.info](http://www.shortsea.info)





# SPC Belgium



1998, SPC Belgium was founded under the umbrella of Promotion Inland Navigation Flanders. 2.4 persons are currently working full time for the SPC. The Belgian SPC is being subsidised by the Flemish Government. This yearly dotation is based on the fulfilment of the business plan (currently 2003-2005).

As one of the founding members of the European Shortsea Network (December 2000), Belgium continued the strong engagement within the network in 2004.

A joint workshop focussing on the possible synergy between road transport and shortsea shipping was organised with our Portuguese colleagues in Lisbon on October 26<sup>th</sup>. With 158 participants it proved being a great success.

After the conclusion of Grant III, SPC Belgium engaged itself in a tutoring project for new EU members with a coastline, aiming at the establishment of a shortsea promotion centre.

SPC Belgium set up and co-ordinated the project for making a brochure reflecting all the shortsea connections between France, Portugal, and Spain on the one hand and Denmark, Finland, Germany, Holland, Norway, and Sweden on the other hand. The target was to stimulate a modal shift from road to sea for the road transport just transitting through Belgium. Also the shortsea connections to and from the Flemish ports and the hinterland connections via waterway were included.

In total ten ESN members have been working closely together for this brochure that was distributed on a European level.

Together with other ESN members "Euronationals" have been approached: companies having production units and branches in different EU countries. The aim was to inform about the possibilities of shortsea shipping by joint approach.

SPC Belgium increased the efforts to focus on the market as a neutral, non commercial intermediate party. The marketing tools were further developped : a restyled website (18,800 visitors), country specials on Denmark and the Baltic States (cf German Maut), 4 newsletters (with best practices), the start of an electronic newsletter...

The use of best practices in our newsletters, presentations, on our website (also the ESN website)... remains the most direct way in approaching the potential SSS users and in countering certain bottlenecks.

SPC Belgium is convinced that young people are the actors for SSS in the future: Therefore, a special youngster's corner has been reserved on our website and a strong involvement in a joint project ("areyouwaterproof") in order to attract youngsters for 'waterborne' jobs has been developped. These actions will continue in 2005.

In Belgium, the four Flemish ports (Antwerp, Ghent, Ostend, and Zeebruges) generated 107 million tonnes of shortsea cargo (which was about 50% of the total tonnage handled). Compared to 2003, there was a growth of 5 million tonnes (4%).



# SPC Denmark

SHORTSEA PROMOTION®  
DANMARK

Din vejviser til mere søtransport

No activities during 2004

[www.shortsea.dk](http://www.shortsea.dk)





SPC Finland was established in March 2000 and incorporated into the Centre for Maritime Studies of the University of Turku unit in Pori. SPC Finland's strategy is directed by the Executive Committee, the Advisory Committee being the other guidance body. Together with the members of the Executive Committee, the SPC covers all the main actors and authorities in the field of intermodal transport in Finland. SPC Finland is a platform of influence between Finland and the European Union.

### Information dissemination in 2004

Information dissemination on shortsea shipping was intensified in 2004. The new version of the website was published in autumn 2004. [www.shortsea.fi](http://www.shortsea.fi) is the shortsea shipping portal in Finland, providing unique information on maritime and intermodal transport. The news section of the website was developed into a more dynamic form, and information on Finnish maritime transport is provided more extensively to maritime operators around Europe. Emphasis is given to information on European Union. Another service getting continuous positive feedback is the monthly newsletter on shortsea shipping via e-mail. The new version of ESN liner services database has been made easily accessible (more user-friendly available) at [www.shortsea.fi](http://www.shortsea.fi). Co-operation with maritime information systems, such as PortNet, continued during the year 2004.

The newsletter on Maritime Finland was produced to meet the needs of those involved in trade and

maritime transport in Europe. The brochure handles the special characteristics of Finnish maritime transport conditions.

The amount of inquiries to SPC is constantly increasing. The SPC is contacted by shippers and forwarders, maritime operators and administration as well as by students in the field. The requests concern shipping services and maritime business developments. Maritime issues of the European Union are of major interest. In 2004, SPC Finland received several inquiries especially on the Motorways of the Sea initiative as well as on Marco Polo programme.

Shippers, forwarders and other target groups are contacted by the various means of information dissemination as well as by visits to companies and organizations.

### Workshop on the Motorways of the Baltic Sea in Sopot, Poland

Workshop on the Motorways of the Baltic Sea was organised jointly by SPC's of Finland and Poland, the Finnish Ministry of Transport and Communications and the Ministry of Infrastructure in Poland. The aim of the workshop was to strengthen the future co-operation within the framework of the Motorways of the Baltic Sea -initiative. This subject gathered a wide audience consisting of maritime operators, representatives of Maritime Authorities and other interested parties in the workshop in Sopot, Poland on October 11, 2004.



# SPC France



SPC-France had to suspend its activities in October 2004 due to a lack of financial visibility. There are some signs that the SPC should resume its main functions in the near future. At the time of printing, the precise date of this "waking up" was not known by ESN, but it could be in the summer.





SPC Germany



The Shortsea Promotion Center in Germany has been in operation since July 2001. First the project was planned only until end of 2004, but due to satisfied results, public and private partners (financial supporters) extended the operation to a second period of time, lasting until December 2007. The organisation's structure as a neutral non-profit organisation, with two employed persons, has been very fruitful, for both, the public as well as the private sector. During the last year, with the seaport of Wismar and Kuehne + Nagel, two more private members joined the Shortsea Promotion Center. One of Germany's major deepsea freight forwarder, Kuehne + Nagel, demonstrates in this way that shortsea is not only a market for a few niche operators but also for global logistics companies having sea freight experienced personnel all across Europe and a major stake in European barging.

Last year we continued the way of a practical market approach. Four press releases resulted into 43 articles in logistics magazines and regional newspapers as well as in 13 online media. Instead of big advertising in print media more articles were placed at certain magazines. In 2004 personal visits of following target groups were carried out:

- 19 meetings with shippers
- 22 meetings with transport providers
- 21 meetings with SPC private members
- 30 meetings with national and regional politicians
- 7 presentations at third party congresses
- 2 own organised congresses

As a result of all promotion activities we saw last year an increase by 30% in the total number of enquiries, compared with the year before. 170 shippers or transport companies asked questions about alternative cargo transportation by shortsea or inland navigation. Online promotion, including a monthly newsletter, and promotion at "Google", the leading internet search engine, increased the number of website visits from 1.500 at the beginning of 2004 to an average of 2.200 visits per month at the end of the year.

2004 was for the Shortsea Promotion Center a very successful year. In total 19 private companies / organisations were counted among our members in addition to a strong political support from regional and national governments. Finally 30 Million tonne kilometres via European roads could be saved by our activities. Since July 2001, when the SPC project was started in Germany, a total number of 74 Million tonne kilometre via European roads have been avoided, in other words spoken, more than 7.000 full truck loads between Cologne and Hamburg were shifted to European waterways respectively. Regarding environmental aspects our work has resulted into a saving of about 4.800 tonne of carbon dioxide.

Target for the coming year is a much stronger cooperation with members of the European Shortsea Network in the field of Marketing, by exchanging shortsea market news and joined visits of multinational shippers and forwarders in Europe, routing high cargo volumes via European roads.







SPC Greece



The Greek Short Sea Promotion Center was established in the early months of 1998. It is hosted by the Mediterranean Cargo Vessels Shipowners Union whose members are exclusively Short Sea Operators. Members of the GSSPC are the Ministry of Merchant Marine, the Union of Greek Shipowners and the Mediterranean Cargo Vessels Shipowners Union.

Our primary task has been- and still is- the facilitation of Short Sea Shipping in Greek ports through Round Tables mainly with the assistance of the Mercantile Marine Ministry, the Ministry of Finance (customs procedures) and the Port of Piraeus which is the home port for the majority of Greek owned vessels.

Through these meetings, as well as with our continuous follow up and cooperation with the competent Authorities, we are trying to overcome a large number of bottlenecks and excessive costs which hinder the operation of Short Sea vessels.

Together with other interested Parties, we mainly focused in the smooth operation of the Port of Piraeus. Especially during summer time, cargo congestions and ships delays were the main problems of the Port, causing major problems to the users. Due to some successful initiatives but also to the shift of cargo to other Greek Ports (Thessaloniki, Volos, Herakleion) the operation of the Port seems to be better now, but still it can not be considered as a stable and smooth operation.

The port of Piraeus has now ordered the acquisition of a mobile crane for containers and created new space for the Car Terminal. Further space for the Container Terminal is now among the priorities of the Organization.

Following the Bottleneck exercise translation of cargo manifests into Greek is not required when they are used as proof of the Community status of seaborne goods. This we consider as a success story, although the direct delivery of EU cargoes is not feasible yet.

In the Motorways of the Seas Community initiative, we were and still are in close cooperation with the Ministry of Mercantile Marine, as well as with our Members, in order to keep them informed of the current developments. The same applies to the Marco Polo Programme.

Finally, we intensified our efforts on the Port Directive. We consider this instrument as a "sine qua non" for the promotion of Short Sea Shipping in relation to Greek Ports and we stressed the Greek competent Authorities that we support every initiative to the direction of liberalizing Port services. In this sense the GSSPC is providing locally, and particularly towards the authorities, the liberalization of Piraeus Port services and the application of new low tariffs for cargoes originated/ destined from/to ports (EC and Greek), when road transportation is an alternative.





## General

In 2004 the Dutch Presidency of the EU and the chairmanship of SPC Holland of the European Shortsea Network (ESN) dominated the activities of the shortsea promotion centre. The Dutch minister of Transport Mrs. Peijs often mentioned the importance of shortsea shipping as an alternative for the traffic jams in Europe. But she also stated that from an administrative and customs point of view, shortsea transport should be as easy as road transport. Furthermore she emphasised the important role of the European Shortsea Network. SPC Holland has organised a workshop "Quality criteria for motorways of the sea" with co-operation of SPC Finland, Spain, Italy and Ireland. The conclusions were presented at the High Level Meeting Shortsea in Rotterdam.

From 1 July 2004 till 1 July 2005, SPC Holland was chairman of ESN. At the end of September Holland has organised an ESN meeting in Amsterdam. One of the most important decisions was that the network has to concentrate on practical cooperation and exchange of information. As far as financing from the EC is concerned, the members of ESN decided to accept money for the start-up financing of new SPCs.

## Database

The database of SPC Holland is the basis for all activities. Records of companies in the primary target group contain information on the countries the companies export to or import from and for the records for all target groups the enquiries and follow up are registered in the database. All data on liner services are recorded in the liner services database and are used for the search engines on our internet site.

In 2004 the SPC recorded 34 increases in the number of sailings and/or ports that were added to the sailing schedule and new services (total of 13).

## Enquiries

In comparison with 2003 the number of enquiries has increase with 33% to 439. Herewith the number

of enquiries is back again on the same level as 2002. The conclusion is that the mailing of specific information (Factsheets per country) to shippers etc is effective.

## Mailings

Publication	number	Target group
Brochure "Transit Cargo" of SPC Flanders/ESN	± 144	Shippers in south of Holland
Factsheet Baltic States and Poland	± 420	shippers transport companies
Factsheet LKW Maut	± 680	Shippers
Factsheet Malta and Cyprus	± 200	Shippers (per e-mail)

## Internet [www.shortsea.nl](http://www.shortsea.nl)

Continuously the bureau adds companies to the database, e.g. to the database brokers. This database is not yet complete and this is partly due to the fact that this market is not transparent is, but also because brokers do not supply us with information.

The average number of visitors per calendar day rose from 28 to 31 in 2004; per working day from 36 to 39.

	2004	2003
Newsflash	107 items	83 items
Total number mailing list subscribers	922	121

## Search engine and freight enquiry

The use of the search engine dropped in 2004 to 1793. However, the search engine was used more often through the freight enquiry system. The freight enquiry was used 300 times in 2004 and shows a steady increase since the opening late 2003.



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 2004, the office facilitated a number of developments in this important area.

### Identifying EC funding programs that support Shortsea Shipping opportunities

- The office implemented a comprehensive marketing campaign to create awareness of EU programmes (including Marco Polo, 6th Framework programme, TEN-T) that may assist private companies develop shortsea shipping operations.
- The IMDO assisted with 4 submissions for the second call of the EU funded Marco Polo programme. Two of the submissions have been selected for the reserve list

### Market Research

• The office continued to undertake research in-house as well as commissioning research projects in its efforts to increase the performance and improve the awareness of short sea shipping potential. In November 2004 it published a Europe on opportunities on Irish inter-European trade corridors. Further strategic reports were also identified and are expected to be completed in 2005. To support the public launch of this report, The office organized an Industry Seminar "Motorways of the Sea – Opportunities & Challenges for Ireland" at which the Marine Minister Pat the Cope Gallagher T.D., Marine Minister, Department of Communications, Marine and Natural Resources formally launched the report. The event focussed on a number of key opportunities for the Irish Shipping Sector. Speakers included Mark Major, Intermodality and Logistics Unit, DGTREN. The event was attended by all the major Irish carriers and ports as well as representative organisations in business and transport. In 2004, the office released its first edition of the statistical bulletin – the "Irish Maritime Transport Economist" which provides Irish companies involved in international trade with relevant statistical, trade, traffic and shipping market information collated in a single journal.

### Policy Advice & industry liaison.

- During 2004, the IMDO provided regular updates and advice to Government on regulatory and industry issues on both a national and European level in the shortsea area. The office also provided regular briefs to officials in DGTREN.
- Developed additional features to the IMDO interactive route map which provides a full free database of shipping services, ports, routes, operators and frequency of services available from all Irish ports.
- The office conducted an estimated 100 face-to-face meetings with senior executives and professionals in the shortsea sector in Ireland during the year.

### Industry Development & New services.

- The office was requested to lead the process to find a new operator to replace P&O on the strategically important Ireland-France route. In December 2004 a new Irish company Celtic Link" announced its intention to create a new service in January 2005.
- Three new direct container services between Ireland and Rotterdam were launched at the latter end of 2004, reflecting Ireland's buoyant trade and economic environment. AC IRELAND Line, a new shortsea shipping line, was launched on November 12, 2004, operating between the Netherlands and Dublin. Dutch firms AC Holding, the parent of AC Forwarding, and Hudig Veder & Dammers are joint partners in the new shipping line. A new Container Liner Service between Foynes, on the West coast of Ireland, and Rotterdam commenced on the 20th November 2004. The line is being run and managed by Teamlines GMBH, a well known and respected feeder operator in Northern Europe, with headquarters in Hamburg, and a subsidiary of the Finnlines Group. The third new route, a new X-Press Dublin-Rotterdam service, started operating on 3rd December, 2004. The service is being operated by Sea Consortium, a member of the X-Press Feeders Group. X-Press operate a fleet of modern container vessels ranging from 300 TEU to 1500 TEU capacity.



SPC Italy



The Shortsea Promotion Centre (SPC) – Italy is a member of the European Shortsea Network (“Your navigator from Highways to Waterways”). Together we work to improve the transportation of goods in Europe promoting Short Sea Shipping as a viable solution in all regions of the European Union and the Motorways of the Sea as an effective and convenient way to deal with the problem of road congestion.

Italy has a natural role of logistic platform in the Mediterranean and ideal gateway to Northern and Eastern Europe, due to its geographical position. It is therefore ready to meet the challenge of a Mediterranean Free Zone (to be created in 2010) while becoming “the heart of the great east-west routes”.

Recent statistics on SSS by sea region confirm that the Mediterranean accounts for the largest share of short-sea traffic (at 30%) in terms of tonnes of goods being loaded/unloaded in its ports (with a + 2% from 2000 to 2003).

The data also confirm Italy as the leader in the Mediterranean, where it handles a 42% share of the total SSS traffic (+ 4% in three years), and in the Black Sea with a 44% share.

When the whole SSS area is considered, Italy accounts for the second largest share of the total traffic with 302 million tonnes of goods handled.

In terms of services Italian Short Sea Shipping capitalizes on 16 National “Autostrade del Mare” and over 160 regular services operated from more than 25 ports strategically spread throughout our peninsula. 80% of the total goods traffic in Italian ports is SSS.

At SPC – Italy we work to improve public’s and haulers’ perception of maritime transport, to supply actual and potential users with practical information, to simplify access to maritime services and retrieval of information. We also act as a bridge between the different industrial sectors involved in Shortsea and between these and public administration with a specific eye to the solution of bottlenecks. In addition we are committed to raising awareness of the benefits of combined mobility in the public at large, capable of improving our quality of life and the eco-system in which we live.

In March 2004 we organized a conference of international relevance in Naples (“Short Sea Shipping: dall’Italia al Mediterraneo”) with the participation of influential personalities from industry and public life, attracting favourable attention from the media. Workshops and two part meetings were held throughout the year while representatives of the Promotion Centre were invited to play an active role in the most significant events associated with combined transport and sustainable development.

The creation of user-friendly information maps picturing the existing regular SSS services by area to be handed out on public occasions resulted in a success beyond expectations.

Important objectives in knowledge-spreading were met through the participation in Verona’s International exhibition of road transport technology, intermodal services and logistics – Transpotec Logitec 2004 - after which a large increase in visitors to our website was recorded (nearly + 50%).

The Promotion Centre’s website was appreciated not only for its provision of full information about Italian SSS services, but also for the clear presentation of guidelines and requirements for the Marco Polo project. SPC staff were frequently asked for technical advice on this issue as well as on European Transport Policy in general at a time when national attention is increasingly focused on the subject (an upshot of which has been the introduction of a national bonus for combined transport in 2005).

In 2004 SPC – Italy was continuously involved in all stages of the European Network activity, acting as Technical Manager for the internal communication system. SPC Italy had been assisting new possible members of ESN, namely Cyprus, Malta and Turkey, in the establishment of their respective Shortsea Promotion Centres.

Italy, a Sea of Advantages:

120 ro-ro services only in the Mediterranean area

25 loading/unloading ports linking to:

Med Sea

Baltic Sea

Black Sea

3 Transshipment hubs

Safe Waters

[www.shortsea.it](http://www.shortsea.it)





SPC Norway was established in 2003. 2004 was the first full year of operation. The focus of the activities have been promotion of shortsea liner services and co-operation with:

- The industry and their organisations – shippers, lines, ports etc.
- "Focal Point" other authority initiatives and regional projects
- ESN and the other SPC's.

The Norwegian Focal Point is represented by the Ministry of Industry and Trade and the Ministry of Fisheries and Coastal affairs

The activities in 2004 has been financed by the Ministry of Industry and Trade, the Ministry of Fisheries and Coastal affairs and the Ministry of Transport and Communication and support from the EU Commission through ESN.

A key activity in 2004 has been to complete, develop and market the liner database on our web-site [www.shortseashipping.no](http://www.shortseashipping.no). We have experienced a great interest in the service and there will a continuous development of the service based on market feed-back.

We have participated in the development of the ESN liner database and intend to integrate our national service with our national service based on XML communication.

A series of presentations of this national and concerted European effort to enhance short sea transport has been given in conferences, meetings etc. A printed brochure has been developed and distributed. Articles and notices in the professional

press have been numerous. Our web-site it has been redesigned and developed and news and directory services was introduced.

Direct contacts with individual companies and key persons in the industry have been numerous.

It has been observed that there exist several parallel initiatives with the purpose to contribute to bring transport from land to sea. This concerns particularly regional initiatives as Interreg projects: Northern Maritime Corridor, REMARCC etc and North Sea Commission. We have actively developed co-operation with these. With NMC we have carried out a project aiming at making it easier to use sea transport through modern use of IT, [www.shortseashipping.no/etc](http://www.shortseashipping.no/etc)

The co-operation with our colleagues in ESN has been close through face-to-face meetings, CIRCA and bi-lateral contacts. We have proposed a co-operation on development and implementation of an "Short Sea XML-standard". We have presented the transport challenges emerging in the Norwegian Sea/The Barents Sea.

In order to reach the big number of companies: shippers, intermediates, transport providers etc with information and services we have co-operated with their organisations: Federation of Norwegian Transport Users , Norwegian Shipowners' Association, Federation of Norwegian Coastal Shipping, Association of Cargo Freighters, Norwegian Shipbrokers organisation, Norwegian Logistics and Freight Association and Norwegian Ports Organisation.



# SPC Poland



Since May, 2004 Poland became EU Member State what is the most significant event of the past year. Already in May 2004 some of Polish short sea operators trading from Polish ports to those within EU borders obtained status of "EU regular liner service" what significantly improved efficiency of ports' operation.

SPC continued efforts to further strengthen co-operation with the entire maritime industry amongst those: shippers, forwarders and port terminal operators and ship owners.

In order to achieve this goal Polish SPC established contacts with other organizations like for instance Polish Chamber of Maritime Commerce, Ports'

Advisory Boards, Chamber of Forwarding and Logistics and Polish Maritime Cluster.

Being in line with intra-EU agreed strategies SPC's speakers attending conferences and seminars are promoting subjects like MARCO POLO projected highways of the seas and intermodal and combined transports between ports situated in geographical Europe and in particular those along the Baltic coastline.

SPC serves as a platform for exchange of information and ideas developed in the other EU Member States. Constant efforts to develop a common internet site being hampered by lack of a sufficient financial means for R&D budget.

[www.shortsea.pl](http://www.shortsea.pl)





# SPC Portugal



The Portuguese Short Sea Promotion Centre was established in the end of 2001. 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) and the Shipowners Association.

Since the beginning the financing project for the Shortsea Promotion Centre has been a problem once it was impossible to have more contribution from the Government except for the 1st year of working.

In this sense the budget being small forced the Portuguese SPC to be imaginative and to take advantage of every single opportunity, combining the professional experience and knowledge of the business of all the members.

Knowing that one of the major tasks was promoting the good image of the Short Sea the office has participated actively in almost all public initiatives related to the transport environment as well as giving their contribute with several articles to newspapers and magazines.

The Promotion Centre has organized three Seminars during the year fully dedicated to the SSS theme.

The first Seminar was organized in Figueira da Foz in March and has a very good level of participation (more than 100 people). The speakers

were the Port Authority, a shipper, a shipowner, an academic, a Director of the Portuguese SPC and the Secretary of State for Transport.

The second Seminar was handled together with the Shortsea Promotion Centre of Flandres in Lisbon in October and the intention was to attract the road hauliers to the sea. Apparently it has been a success once there were more than 100 attending.

The third Seminary was organized in October in Budapest during the FONASBA (World Shipping Agents Federation) annual meeting.

During the year the Promotion Centre was able to convince with success the Shipowners Association to become a member which happened in the end of the year. An approach was made as well towards the Freight Forwarders Association but in spite supporting the SPC they were not able to commit themselves to become members because of the annual fee.

Finally the Portuguese Promotion Centre representative, being in charge in ECASBA (European Ship Agents Federation) of the SSS Working Group, has disseminated information related to development of SSS in all European countries (reports from all Short Sea Promotion Centres) to the European ship Agents in a sense to motivate their role and action for a better contribution in promoting SSS in their countries.







From its very beginning, the specific mission of SPC Spain has been the promotion in Spain of SSS, as a sustainable logistic alternative, based on the collaboration and cooperation of the different modes of transport, as well as through public and private institutions.

During the first year, the necessary steps were taken in order to have a base to accomplish that mission. Since then, most of its activities has been focused to spread the concept and to make it aware for the objective public. That same year SPC Spain entered, as full member, to the European Shortsea Network, ESN.

The second year witnesses the Association consolidation and her recognition as the main national referent broadcaster of SSS. At the same time, at an operational level, the SSS services in Spain became stronger and new business initiatives arise.

During that year the Association published the result of the first studies done:

- The economic impact of SSS in -at that time- Ports Act draft
- The Motorway of the Sea Concept for Spain
- Type and volume of cargo available for SSS
- The involvement of the road transport sector in the development of SSS: conditions to become true, whose conclusion are still completely valid today.

At the same time, the Commission started his SSS Promotion Plan through fourteen measures. Of them, the Marco Polo programme stand out, and to its first announcement several proposal involving spanish interest were presented, all to which our Association let her assistance and support. Three of those resulted selected:

- Ro-Ro Service between Santander and Dunquerque (the contract finally was not signed)
- Ro-Ro Service calling Italy, Spain, Tunisia and Malt (1,5 mill. €), and
- Service calling Cartagena, Huelva, Almeria, Algeciras and Rotterdam (1,5 mill. €).

In Spain, at the end of that second year, the 48/2003 Act, referred to Economic Regime of Ports, considered some new concrete discount to SSS services fares.

We have recently celebrated our third anniversary of the Association, and most of our activities have been focus to:

- Collaborate the presence of spanish companies in SSS services performed from Spain

- To seek the cooperation from others european promotion centres for new partners interested in traction at discharging port
- To sustain a clear spanish position regarding Motorways of the Sea, as well as an objective quality criteria for the acceptance of the different elements of the aforesaid.

The decisive participation of *Puertos del Estado* in this last topic permitted Spain to take some leadership regarding the concreteness of these criteria at a european level. In consequence, most of the members are in favour of the none a *priory* government appointment of the ports that will be part of the Motorways of the Sea, but of leaving the market forces to chose the ports and services, and admit them through the accomplishment of objective quality criteria.

On the other hand, the business activities resulted today in 24 SSS services, calling the ports of Vigo, Santander, Gijón, Bilbao, Pasajes, Barcelona, Tarragona and Valencia, involving 12 companies and the study of new services from new ports.

Regarding future perspectives, it's important to mention the proposals of the "Plan Estratégico de Infraestructuras y Transportes – PEIT" (Strategic Plan of Infrastructure and Transport) referred to the SSS and Motorways of the Sea promotion. From them, we may remark three specific programs:

- The first one, to erase the handicaps to SSS development, coordinate by the *Dirección General de la Marina Mercante y Puertos del Estado*,
- Another specific program to support the development of intermodal chains in order to finance new services' initial phases (this program was already proposed by SPC Spain during her first year of life),
- And, as well, a Port Access Improvement program.

We are conscious that the SSS promotion is a long run race and that persistence and perseverance are essential. We trust that recent important memberships will strengthen our activities. Through the present year we have maintained the support of the specialised press and medias. We appreciate this wide support and hope, in any case, to have it also in the future since we are aware than a mission as the entrusted, the aforesaid support is absolutely essential.





The Swedish Maritime Forum (Sjöfartsforum) is the organization responsible for promoting and developing the Swedish Shortsea activities. The Maritime Forum is a members-funded network comprising approximately 150 members from different areas of the maritime industry, including: shipping companies, agents, brokers, ports, forwarders, government institutions etc.

An important role of the Maritime Forum is to interact with its' members and to inform of developments within the shipping industry - with particular emphasis being placed on Shortsea shipping activities and intermodal transportation. The means by which this information is relayed is through face-to-face meetings, by phone and mail communications, through newsletters, through two local websites and through the ESN common website.

Furthermore, the Maritime Forum continues to be an active contributor, and often the instigator, to numerous conferences and seminars within the maritime area. By doing so, the Maritime Forum plays an important part in bringing the Swedish maritime community together to discuss the major issues affecting the industry.

Examples of events in 2004 where the Maritime Forum was actively involved:

#### **January 21**

The Maritime Forum organized a seminar concerning the European Commission's proposal for a new European Intermodal Loading Unit (EILU). The proposal was met with much criticism and a lively debate followed.

#### **March 8**

Represented the European Shortsea Network and was actively involved in the conference on "The Motorways of the Baltic Sea" in Klaipeda, Lithuania.

#### **May 25-27**

During the "Logistics and Transport" exhibition at the Swedish Exhibition Centre in Gothenburg, the

Maritime Forum and the European Shortsea Network were jointly represented with an area on the floor of the showroom. Furthermore, Per Jessing of the Maritime Forum was the Moderator for the seminars on "Port Package" and "Motorways of the Sea".

#### **August 19, October 11 & October 18**

Seminars in Sjöfalle, Karlshamn and Stockholm respectively, discussing the effects of the new proposal by the Swedish Government's Commission on the Transport of Goods. This proposal has caused much debate and is of great importance as it will be the basis for the Government's Transport-Political Proposition of 2005 which in turn will decide the future of Sweden's infrastructure and goods transport flows. The proposal lays out the government's role in integrating transports between different modes of transport, in creating efficient transport solutions for Swedish industry and in making the Swedish transport industry competitive. The connection by sea between Swedish ports and the rest of Europe is of course of great importance in deciding the future of Sweden's transport infrastructure.

#### **October 4, 5 & 14**

"Custom days" in Malmö, Gothenburg and Stockholm. The Swedish Customs Service, The Swedish International Freight Association, The Swedish Federation of Trade and the Chambers of Commerce in the three regions organized these events. The three conventions drew many visitors and the main topics concerned the transport of goods within the European Union. Per Jessing of the Maritime Forum was the Moderator at all three events.

These are some of the events which the Swedish Maritime Forum has participated in during 2004. Further information is available in Swedish at [www.maritimeforum.se](http://www.maritimeforum.se). Please also visit our other website aimed at getting young people interested in a maritime career: [www.kastaloss.nu](http://www.kastaloss.nu) (in Swedish).



Sea and Water incorporates the UK Shortsea Promotion Centre and was established in 2003. Our core aim is to encourage freight off the highly congested road network and onto the environmentally friendly and sustainable modes of shortsea, coastal and inland shipping.

We are governed by a board of directors taken from a number of industry areas and we operate through two committees representing a wide range of sector interests within shortsea, coastal and inland shipping. Day-to-day business is handled by a small full-time executive.

Uniquely, Sea and Water brings together the entire UK water-freight industry.

Funded jointly by UK Government and the water-freight industry, Sea and Water operates in three main areas:

#### **Policy**

Unique and very strong links with central government, particularly at ministerial level, allow a good dialogue and the very real opportunity to influence policy at all levels, including Europe.

#### **Promotion**

Championing water to the buyers of transport services as an alternative mode for moving freight.

#### **Advice and**

Providing advice and education to the industry and a forum for the **Networking** entire industry to meet, mix and do business.

Our latest project is an on-line water-freight database which will provide a shop window for the industry. It will describe the industry in terms of infrastructure and services to allow a user to search for ports, terminals, navigations, ship and barge operators and other related services. Maps and charts will also be available. The system is being designed to allow the industry as a whole to better present itself to its potential customers.

Additionally, the first in what we hope to be a range of Sea and Water publications will be our water-freight review covering shortsea, coastal and inland shipping. Chapters will include an economic outlook, an analysis of the industry; short and long term trends and future prospects. Analysis and insight will accompany hard statistical information.

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For more information on ESN and its members:

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