



European Shortsea Network

Annual Report 2005





Foreword



Since the release of the latest Annual Report of the European Shortsea Network, the number of the network members has increased steadily. In 2005, four new SPCs were established into Malta, Croatia, Bulgaria and Turkey. The network is looking forward to incorporating the new members into the network. The enlargement of the network gives possibilities to new initiatives of co-operation, either bilateral or multilateral. The geographic location of the SPCs is in the northern and southern as well as western and eastern axis, and the members come from the countries within the EU as well as from its neighbouring countries. This will enforce practical shortsea promotion activities all around the Europe.

In 2005, the European Shortsea Network meetings were held in March in Bilbao in the connection with the Shortsea 2005 conference and in October 2005 in Brussels. The Brussels meeting was followed by a joint meeting with the Commission and Short Sea Focal Points. The co-operation between the two networks is intense. Identification and solution of bottlenecks in shortsea shipping is one of the areas of practical co-operation, and a good example of the work of the SPCs as a platform between industries and administrations. Also, ESN provides an effective channel for information dissemination and for European level dialogue – quite many of the bottlenecks are related to different adaptations of common rules and legislation.

When looking at the activities of the SPCs in this Annual Report 2005, it is remarkable that the efforts of the network in the promotion of shortsea shipping are today wide ranging. Along providing information and services for the industry there are efforts to influence national and European policy; for the framework conditions of shortsea shipping. National authorities, maritime and transport related industries, shippers and European level organizations notify the work of the SPCs and support them financially. The support of the European Commission has provided the European Shortsea Network the possibility for Europe wide co-operation to promote shortsea shipping in practical means. Unfortunately, still in 2005 for many of the SPCs the promotion work has been difficult because of scarce or non-existent resources.

In 2006, the opportunities of the SPCs and the ESN to expand into intermodal promotion will be examined in a prefeasibility study. We hope that this will enable the SPCs to strengthen their position and widen the support from the industries and administration. In the end, intermodality is built in shortsea shipping.

SPC Finland
Riitta Pöntynen
Chairman of ESN





Founded in 1998, the Shortsea Promotion Center Belgium/Flanders finished its second business plan (2003-2005). The Promotion Center is known to the market players, this is clearly proved by the number of enquiries handled, the presentations given, the hits on the website www.shortsea.be

Although the last years are not really considered as a highlight in terms of economical growth, it's remarkable that the figures of shortsea shipping, as sustainable part of the transport chain, keep growing. Shippers and logistic companies are more intensively looking at multimodal transport solutions to reduce the transport costs and maintain their competitiveness. In 2005 the four Flemish ports handled over 113 million tons of shortsea cargo, a growth of 28% compared to 1999. Over 50% over all cargo handled in the four Flemish ports is shortsea cargo.

The seariver traffic on the canal Brussels-Scheldt grew again, while the number of tons on the Albertcanal keeps decreasing (lost traffic and infrastructural bottlenecks).

SPC Belgium was active in a wide spectrum of activities. Quite a lot are situated in bi- or multilateral initiatives within ESN : joint trade fair stands on the "Shortsea 2005"- conference in Bilbao and a transport fair in Venlo, an informal meeting with some members of the Transport Committee (European Parliament), joint visits to 'Euronational' companies... Together with other members of ESN, SPC Belgium assisted the start up of new Shortsea Promotion Centres, especially in

the new EU countries (May 2004) and the candidate countries.

Locally a lot of fieldwork was done by visiting potential users of shortsea shipping and companies offering logistic solutions. Where agreed by the shippers, best practices were used in presentations, on the website or in one of the four newsletters that were published in 2005.

Specific bottlenecks were tackled : an initiative was taken to eliminate the physical stop which seariver vessels sailing onto the Albertcanal still have to make in the port of Antwerp for custom purposes. In a country special SPC Belgium focussed on the United Kingdom and Ireland.

Roadhaulier companies, faced with difficulties to fulfil the delivery conditions due to increasing congestion, have become more and more interested in a possible synergy with SSS. Some of them are profiling themselves already as 'Intermodal provider'.

Contacts with all sorts of authorities (ports, waterway managers, governments...) are maintained, specifically via the steering group sss where a lot of expertise is brought together. In September 2005 the Flemish Government announced the introduction of new tariffs for pilotage on the river Scheldt, favourable for SSS. The tariffs introduced by the waterway manager of the Seacanal Brussel-Scheldt (2004) contributed to an increase of seariver traffic on this canal in 2005.



Shortsea promotion Denmark is managed by: "The Maritime Development Centre of Europe" (EMUC), which have joint office management with "The Association for Promotion of Danish Shipping" and "The Danish Society for Naval Architecture and Marine Engineering". This integration of office management was established in 2005 with the employment of the joint Chief Executive Officer Mr. Steen Sabinsky.

EMUC Represent the maritime cluster in Denmark and members is ship owners and operators, shipyards, equipment and components producers, port authorities, Research and Educational institutions, National authorities; Trade and interests organisations, Service and consultancy companies, classification societies, Finance and insurance companies.

We have rented office location in the premises of The Danish Shipowners' Association and have an excellent corporation in joint forces special on the recruitment of young people to the Danish maritime industry. In the same house "Danish Car Ferry Association", "Danish Shipbrokers' Association" and the "Danish Maritime Occupational Health Service" are located. In spring 2006 "Danish Maritime" is moving their location to the same premises so the environment is and will be very innovative and maritime. The maritime sector in general is still in a healthy trend and the maritime cluster in Denmark will surely work together to gain further.

In 2005 a new initiative was taken in Denmark to promote Danish Shipping, Shipyards and related industries. The Danish Maritime Fond was established and is now active promoting innovation and development in maritime industry. We will have a busy year in 2006 with four conferences which will take place in 2006. In Copenhagen 27th of February the conference "The relationship between

The Ship owner, The Classification Society and the Danish Maritime Authority" is arranged by "The Danish Society for Naval Architecture and Marine Engineering". In connection with the "Shipyard week" (in Denmark the "Maritime Week") a conference is held in the Danish Parliament. The maritime conference is arranged by Danish Maritime, CO Industries and the Danish Shipowners' Association. The 30th of March a conference with title "Development of Denmark as one of the Leading Shipping Nations in Europe – why, how and with whom?" is arranged by EMUC. The 25/26 of August the conference "Maritime Safety, Environment and Health 2006" is taking place and is arranged by "Danish Maritime Occupational Health Service", "Danish Maritime Authority and "The Maritime Development Centre of Europe".

The Shortsea promotion Denmark is managed as a maritime network under the control of EMUC. The development of the Shortsea promotion Denmark's WEB page have been on hold until further notice, due to lack of finances. The interest of the maritime cluster to further develop the WEB page will be investigated in 2006. A more active role in the promotion of Shortsea and special Supply (transport- & production) Chain and intermodality will also be part of the investigation. Denmark will also participate in the European Shortsea promotion Networks meetings. Meetings in the Shortsea promotion Denmark network are being planned to take place in 2006 as part of EMUC's strategy plan. Corporation with the "Department of Maritime Research and Innovation" established in December 2005 to further evaluate the possible development of the Shortsea promotion will take place in 2006.



SPC Finland was established in 2000 and incorporated into the University of Turku Centre for Maritime Studies unit in Pori. SPC Finland's strategy is directed by the Executive Committee, the Advisory Committee being the other guidance body. All the main authorities and players in the field of intermodal transport are represented in SPC Finland's activities through these committees. The centre continued to receive strong support from the entire transport chain in Finland including maritime, road and rail operators. In addition, the Regional Government of Åland recently joined the Executive Committee. SPC Finland is today a well known platform between Finland and the European Union as well as between the industry and administrations in Finland. SPC Finland makes statements on legislation in preparation in the field of maritime transport in Finland and in the European Union.

Information Dissemination

SPC Finland's information materials were partly renewed in the beginning of the year, and a new brochure was produced to market the liner services database. The brochure was widely distributed to the potential user groups of the database, i.e. shippers, forwarders, and other transport companies. The database was also presented and demonstrated on visits to companies and exhibitions. Co-operation with other maritime IT-systems, such as PortNet and the Baltic Sea Ferry Datapool, was continued and intensified.

The monthly newsletter on shortsea shipping was composed and sent by e-mail on a regular basis to the registered recipients, the number of which is

constantly growing, now being around 350. News items were also published on the centre's website both in Finnish and in English. The centre consolidated its media relations and contributed to several newspapers and magazines of the field.

Seminars and Workshops

SPC Finland arranged a topical seminar on prospects of European seafaring in Helsinki 2 May 2005. The seminar gathered together nearly 80 participants representing all target groups of SPC Finland, including ports, shippers and shipowners. The European Commission was represented by Mr. Ismo Koskinen. Topical issues, such as Motorways of the sea and ports services directive, aroused vivid discussion in the seminar.

In autumn 2005, SPC Finland started to prepare a workshop on the bottlenecks in shortsea shipping to be held in January 2006. SPC Finland's interest groups were sent a questionnaire on new bottlenecks and their possible solutions. Special attention was paid to customs issues, Russia-bound transportation, and the implementation of new environmental regulations.

Activities within ESN

SPC Finland participated in network activities including tutoring the new promotion centres. Guidance was offered to Estonian partners taking preliminary actions to establish an SPC. During the last part of the year, the Finnish centre started making preparations for the upcoming ESN presidency April-December 2006.



SPC France



SPC France was founded in January 2000. Its activities were temporarily suspended in October 2004 due to a lack of financial visibility but were resumed as from August 2005. SPC France currently employs one person on full time basis.

The Centre is an independent non-profit body where members and financial supporters are public and private companies or organisations interested in shortsea shipping : French Ministry of transport, coastal regions (some of them), ports, stevedores, shipping agents, shipowners, forwarders, road transport, shippers associations, etc..

Actually, the promotion of shortsea shipping in France as a sustainable logistic alternative is based on the cooperation of the different modes of transport.

Eventually, our main purpose is to encourage freight off the congested road network onto the environment-friendly and sustainable modes : namely shortsea, coastal and sea-river shipping.

In 2005, the revival of activities consisted in practical cooperation and exchange of information. Concentration was on promotion of shortsea services and cooperation with our members, the industry at large and related organisations, "focal point" and various authorities, ESN and other SPC.

To start with, we have published a weekly electronic newsletter directed to our members and we are rapidly getting important feedback on shortsea shipping via e-mail ; as a result, information dissemination on shortsea shipping was resumed.

Other actions A series of presentations of national and European initiative to enhance short sea shipping was given in conferences, meetings, round tables directly or indirectly involved in shortsea shipping.

Through these meetings, as well as with our continuous follow up and cooperation with relevant authorities, we partly succeeded to overcome some of the bottlenecks and extra costs which hinder shortsea shipping development.

One of the major tasks being to promote a positive image of shortsea, SPC France participated actively in several initiatives related to transport environment

Workshops focussing on potential synergy between inland haulage and shortsea shipping were also organised.

A great number of these different actions were largely echoed in magazines and newspapers, whether specialized or general.

Also a consequence of the various actions is the increasing inquiries made to SPC France .

SPC is contacted by shippers, forwarders, shipping operators, ports, etc..

Requests relate to shipping services and maritime business developments.

Maritime issues of the European Union are of major interest among inquirers ; at the end of the year, specific questions targeted Motorways of the Seas initiative, and Marco Polo call.

Needless to add that the cooperation with our colleagues in ESN has been close through face-to-face meeting, CIRCA and bilateral contacts.



SPC Germany



European Transport Market Values Shortsea As Future Partner

Shortsea Shipping in Germany is becoming more popular step by step. When the ShortSeaShipping Promotion Center Germany started its operation almost 5 years ago, only a few experts were aware of the advantages of this intermodal transport system. Nowadays the situation is changed. The press and many transport managers have grasped up the expression and the advantages of "Shortsea Shipping".

The SPC Germany noticed last year for example that some mayor multinational shippers have integrated shortsea in their tenders next to road and rail freight. The SPC Germany is registering the stronger interest for shortsea in the quantity and quality of enquiries they receive from transport companies and shippers. With 180 individual enquiries the SPC Germany registered a 4 year record high in 2005. Also the website was strong frequented with a total of nearly 30.000 visits. The monthly national newsletter accounts now 800 addressees.

The stronger interest is also documented in the increased number of private partners at the ShortSeaShipping Promotion Center Germany. Three more private members contribute now

financially the SPC's marketing activities. Overall the SPC counts now 21 private members next to the extensive financial support from the public sector.

After years of strong flows of East European hauliers onto the West European transport market, nowadays the market is faced with the opposite. Low market prices in European trucking have resulted in bankruptcy of many hauliers, which have gone out of the market. Instead of a wave of offers for low price European trucking, today shippers are confronted with problems in charting sufficient trucking capacities at reasonable prices, especially at seasonal peaks. Further more the European Parliament has agreed on a 25% reduction of weekly driving hours for truck drivers most recently. Consequently alternative transports concepts, including shortsea, are becoming more popular for strong European cargo flows. Another pro shortsea aspect is that long term charter rates for vessels are decreasing and the new tonnage transport capacity coming into service between the world's continents, gives shortsea as well as deepsea carrier space to open new attractive shortsea services.





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 GSSSPC 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.

During 2005, the center participated and facilitated a number of developments in the Short Sea Shipping area. Namely:

Regular consultations and face to face meetings with the Ministry of Mercantile Marine (Secretariat for Ports) on matters of both national and European interest.

Regular consultations and face to face meetings with the Port of Piraeus authority in order to resolve problems in the smooth operation of the Port and to overcome certain bottle necks which hamper the operation of short sea vessels.

The Center organised two seminars. One on the possibilities of the smooth replacement of the Greek Short Sea fleet (in cooperation with the BAE systems) and the other on the survey of vessels and evaluation of the operating company for Insurance reasons.

The Center provided to its members regular and updated information by news letters (via e-mail) on short sea shipping matters, including:

- The E-Union programmes on Marco Polo and TEN's
- The IMO developments

In order to enlarge the number of our members we approached players from the shipping industry providing them information about SSS and its potentials.

The Center supported the Port Directive. Although the E. Parliament rejected the Directive, the center asked from the Ministry, to adopt its basic principles.

The Center followed and participated in the ESN activities.

Target for the coming year, is the short sea bulk shipping to play a key role in the South – East Motorway of the sea.



SPC Holland



General

Ultimo 2004 the board of the shortsea centre decided that the SPC will work closely together with a similar organisation for the promotion of cargo by rail; Rail Cargo information Netherlands. At the end of 2005 both centres moved to one new office in order to facilitate day-to-day cooperation. For the time being, each centre retains their own legal status. Discussions on closer cooperation with the Dutch information bureau for inland shipping have started. The aim is to have one promotion centre for all modalities within a couple of years. The European Commission is developing ideas along the same lines, the so-called "intermodal promotion centres".

In 2005 SPC Holland made an analysis for the financing of the activities from 2007 till and including 2009. The conclusion was that financial support from the ministry will be necessary and since the SPC has received confirmation that the Dutch Ministry of Transport will continue their support for that period.

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. All data on liner services are recorded in the liner services database and are used for the search engines on our internet site.

The number of liner services from Dutch ports has almost remained unchanged in 2005, though a number of take-overs took place, of which the Geest and Seawheel take-over by Samskip had the largest influence. Besides DFDS has taken over the Norwegian shipping line Lysline and Maersk, P&O Nedlloyd, but the influence of the latter will be only noticeable in 2006.

Enquiries

The number of enquiries went up by 7% to a total of 470 in 2005. This is the highest number since SPC Holland started in 1997. Except enquiries for specific information, strikingly more often general information has been sent.

All enquires have received a follow up. The total number of companies that have changed from road to sea has increased (as far as we could establish

this). However, they shipped less cargo than in 2004. The total road km. saving is 5,4 million ton/km in 2005.

Mailings

This year two factsheets were made. Factsheet UK has been sent to 720 shippers and transport companies. Factsheet 'Adriatic' was only made as pdf-document and e-mailed to 126 shippers.

Internet www.shortsea.nl

Also this year a few adaptations have been implemented. Under "destinations" the map of the Netherlands has been changed. At a glance you can see which types of inland terminals there are, both barge as rail terminals.

The average number of visitors per calendar day has risen from 31 to 34 in 2005. Per working day from 39 to 44. In total 107 newflasehs were publishes, of which 27 on shortsea services, both new services, as well as changes in the services and deployment of new or larger vessels. The newflash is also used to announce activities of the shortsea centre. Every month these news items will get extra attention by sending the Shortsea mailinglist by e-mail to about 1161 persons.

Search engine and freight enquiry

The search engine attracted less unique visitors in 2005 compared to the previous year. The same applies for the freight enquiry system. However considerably more freight enquiries were made through the system; e.g. 103 in 2005 (2004: 70)

CD-Rom

The production of the cd-rom took some doing. The first version of the reference work on shortsea transport was distributed in October during the Europort Maritime exhibition.

The CD-Rom gives introductory information, like 'What is shortsea', general statistics and information on ESN. Furthermore detailed information on shortsea transport between Dutch ports and European countries can be found, including statistics. The first edition was rather small as the 2004 shortsea statistics would be only available at the end of 2005. The cd-rom was very well received.



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 2005, the office facilitated a number of developments in this important area.

Overview.

As a small open Island economy, Ireland is heavily dependent on its short sea maritime services to connect it to the global market place. Ireland is a short sea dependent economy.

2005 was an extremely challenging year with mixed fortunes for the Irish short sea shipping services industry. The sector was thrust headlong into the media spotlight that surrounded the Irish Ferries dispute. The IMDO provided support to the Government and worked closely with the parties involved in an effort to find an amicable a solution. The dispute underlined the competitiveness challenges facing some segments of the Shortsea passenger & freight business. They were not solely restricted to Irish Ferries. The strategically important central corridor routes between Ireland-UK and also the Ireland to France ro/ro routes witnessed capacity restructuring, bankruptcy, new operators, company takeovers and heightened competition from low cost airlines on the main passenger routes. The IMDO outlined in detail these issues in a key report on state aid and competitive issues to the Government in July 2005.

However it was not all doom and gloom, the overall outlook for the sector remained buoyant with the underlying trend continuing to show positive signs of growth across the industry. The shipping sector contributed an estimated €1.45 billion to the economy in 2005 with an estimated €120 billion worth of goods and services being handled by the Irish ports and shipping services cluster. The ports and short sea shipping operators continued to enjoy strong unitized freight growth driven by continued growth in the economy. A number of ports recorded record throughput in 2005. Both the wet & dry bulk sectors at Irish Ports grew by 7 per cent, while

unitized sectors of lo-lo and ro-ro recorded 9 & 5 % growth.

Other noteworthy highlights during 2005 included:

Market Research & Industry Development

- The IMDO worked closely with both Government departments and other industrial stakeholders in securing a new operator on the Ireland to France ferry service, which is a key trade artery for Irish livestock exports. The new operator was an Irish based company called Celtic Link based in Wexford.
- We supported Singapore-based APL, the world's seventh largest container line, establish a dedicated Irish operation located in Dublin. The company also commenced direct feeder operations from Dublin & Cork with its own vessels to the Rotterdam & Zeebrugge.
- The decision by APL means that by the end of 2006, six of the top ten leading container lines had dedicated stand-alone Irish based operations.
- We submitted three separate short sea sector policy reports to the Government during 2005, including the high level review of employment in the Irish ferry sectors in July.
- The IMDO published the second Annual Irish Maritime Transport Economist in May.
- We also published six shipping reviews of short sea shipping bilateral trade corridor reports.
- Our E-based strategy continued to prove extremely popular with an excess of 675,000 hits on IMDO web portal – representing a 12% increase on 2004 and the fourth consecutive annual increase of web traffic.

For further details on our shortsea programme contact us at imdo@marine.ie or visit our website www.imdo.ie

Italy: Your Natural Logistic Platform in the Med and Ideal Gateway to Eastern and Northern Europe.

The Shortsea Promotion Centre (SPC) – Italy promotes Short Sea Shipping as a viable solution in the door-to-door intermodal supply chain in all regions of the European Union, including the Italian “Motorways of the Sea” as a real alternative to road transport.

The Italian Centre 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 and to promote the “Motorways of the Sea” as an effective and convenient way to deal with the problem of road congestion.

Italy’s role is all the more conspicuous due to its strategic position as a natural logistic platform in the Mediterranean and an ideal gateway to Northern and Eastern Europe.

Recent statistics on SSS transport by sea region confirm that the Mediterranean accounts for the largest share of Shortsea 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 holds a significant position accounting for the second largest share of the total traffic with 302 million tonnes of goods handled.

As for the future, Italy is ready to meet the challenge of a Mediterranean free zone (to be created in 2010) that will include us as “the heart of the great east-west routes” leading to a further increase in trade.

A constantly growing number of services linking Italy to the rest of the Mediterranean and to the Northern European countries shows that Shortsea Shipping currently serves to reinforce cohesion in the Community, facilitating connections in a scenario of increasing road congestion. The wide deployment of new lines is evidence of the economic profitability of the mean and

demonstrates a growing capacity of stakeholders to benefit from the savings and the added value it provides. This is confirmed by the major role of Italian Motorways of the sea in the Trans European transport network (TEN-T), complemented by the so called Pan European transport corridors connecting the TEN-T with Central and Eastern Europe

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 as it is the only method of transport capable of increasing the viability of cargo and passengers, as well as our quality of life and that of the ecosystem in which we live.

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 and further distribution was widely solicited.

The Promotion Centre’s website (www.shortsea.it) is 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 SPC – Italy was continuously involved in all stages of the European Network activity.

SHORTSEA PROMOTION CENTRE – ITALY.....AT YOUR SERVICE

www.shortsea.it



Following the common guidelines of shortsea network we are to acknowledge that the efforts to conform to are wide ranging – information provision, promotion, cooperation with member states, setting targets (major one being to promote a positive image of shortsea), active participation, awareness of the significance of the matter, etc.

This awareness is familiar also to roadhauliers, who faced road congestion challenges and now are more and more involved in searching for new environment-friendly carriage ways, namely, shortsea, coastal and sea-river shipping.

Logistic companies are more intensively looking for multimodal transport solutions and in this way seeking to retain the competitiveness.

Founded in 2004 SPC had undergone all the initial phases, such as establishing of local office (a constituent part of Marketing Department of Klaipėda State Seaport Authority), employing one person, designing logo and defining responsibilities and rights among the involved.

SPC Lithuania is a council consisting of representatives of:

- Lithuanian Ministry of Transport and Communications, Klaipėda State Seaport Authority, Lithuanian Customs, Lithuanian Railroads (AB "Lietuvos geležinkeliai"), Lithuanian National Road Carriers' Association "Linava", Association of Lithuanian Stevedoring Companies, Lithuanian Ship Owners' Association and Lithuanian Shipbrokers and Agents Association.

Known to the market parties the fact that can be clearly proved by numerous enquiries that are tackled instantly. Versatile assistance is offered to all the interested parties. Lithuanian SPC is addressed by shippers, forwarders, shipping operators, ports, etc. who mainly contact via official internet website of Klaipėda State Seaport Authority that has a separate inner page for shortsea shipping

http://www.portofklaipeda.lt/en.php/for_short_sea_shipping/1797.

A wide range of **activities**:

Conferences, Exhibitions (in Bilbao, Spain), **Seminars; Workshops; Studies and researches** (together with other partners within the Motorways of the Baltic Sea Task Force a study *Baltic Maritime Outlook 2006* was prepared); **Website** (it is under process and supposedly in 2006 SPC of Lithuania will have an official website www.shortsea.lt); **Database** (available on our website); **Newsletters**

(receiving); **Media relations** (newspapers, magazines), **Participation** in the European Shortsea promotion Networks meetings.

We are constantly involved in all stages of the European Network activity and making a series of presentations to enhance short sea shipping value in conferences, meetings, round tables, etc.

Local activity (communication with possible users of shortsea shipping segment and with logistics associated enterprises)

New projects: Container train "MERCURY"

Container train "Mercury" is an international project of Lithuanian, Russian and Belarus railways. 20, 40 and 45-foot universal and specialized containers are carried both ways on a route Klaipėda/Kaliningrad-Minsk-Moscow weekly.

This project is aimed at attracting bigger container flows to Klaipėda and Kaliningrad seaports.

Additional logistic services allowing door-to-door delivery of containers and ensuring the choice of the best logistic chain model to the cargo consignor and consignee are provided to those using "Mercury" train to transport containers.

Container train "Mercury" is a fast, affordable and ecologically-friendly cargo carriage option.

Another joint project of Lithuanian, Belarus and Ukrainian railways, companies, and Klaipėda, Ilyitchovsk and Odessa seaports is a **combined train "Viking"**.

The train carries 20 and 40-foot containers as well as semitrailers and trailer-trains (contrailers). They are brought to Klaipėda port by sea transport from Scandinavia and Western Europe as well as via Mukran- Klaipėda ferry-line, and are carried on further on to the Ukraine, Belarus, Near East, and Caucasus – via Ilyitchovsk and Odessa sea ports and back.

The railcars with the containers and trailer-trains are taken by the "Viking" not only to Klaipėda (Lithuania), Ilyitchovsk and Odessa (Ukraine) sea ports, but also to Belarus, Lithuania and Ukraine's railway stations that are covered by the train's route. The train carried 15 000 TEU in 2005 and this year 26 % increase has been already recorded.

Engaged in a variety of **projects and programmes: Motorways of the sea** (we are active participants in the Motorways of the Baltic sea Task Force)

The Malta Short Sea Promotion Centre (MSPC) was established in June 2005 as an independent unit within the Ports Directorate of the Malta Maritime Authority. It has the task of being the focal point for promoting and improving short sea shipping initiatives in Malta in order to enhance the maritime sector contribution to the local economy and Malta's cohesion with Europe and its neighbours.

The MSPC was set-up with its own statute a non-profit and non-commercial centre that shall collaborate and co-ordinate its activities with stakeholders in the transport and logistics industry in Malta. This will afford a greater and more effective synergy between the stakeholders and industry participants on the island. It also has the task to be the central source for the collation and dissemination of information, knowledge and education on short sea shipping activity.

In its efforts to further strengthen cooperation with the entire maritime industry, the MSPC established contacts with shippers, forwarders, port terminal operators and ship owners. It also established contacts with other stakeholders such as the Malta

Enterprise, the Malta International Airport and the Federation of Industries. Discussions with stakeholders identified their various needs and wants and how these could be aligned with the EU policy on short sea shipping and multi-modal transport.

During the year under review, a three-year business plan was also prepared. Most of the task carried out during this first year of operation concentrated on establishing the office locally, creating its logo, design of its website and participating in the work of the European Shortsea Network. In addition to this the MSPC started work on preparing a specific plan on how to further:

- promote transport industry initiatives;
- To develop awareness of the potential of short sea transportation;
- To hold fora, seminars and studies to identify barriers and to make recommendations on how they can be diminished; and
- To develop awareness of EU policies, programmes and legislation.



SPC Norway



"Shortsea Promotion Centre Norway is a government initiative and a part of an European effort to shift transport from road to sea. SPC Norway is an associate member in the Pan-European cooperation "European Shortsea Network" that includes 20 promotion centres for Shortsea shipping Europe wide. SPC Norway is organized as a project under the Maritimt Forum umbrella and has been mainly financed by the Norwegian Government with a certain industry support.

SPC Norway does an active networking and promotional effort towards shippers and the transport industries including shipowners, ports, freight forwarders etc through a series of presentations in meetings and conferences.

The internet based information services on www.shortseashipping.no have been popular and the site has been frequently visited during 2005. The information services have reached a high quality standard and have been actively marketed. On our website one can find information on all regular shortsea shipping lines calling Norwegian ports, door-to-door information services giving shippers information on alternative shortsea connections minimizing the road distances, shortsea news, information on shortsea events etc. The newsletters are widely distributed and appreciated – more than 1000 addresses receive our monthly newsletter. The short sea industry services have also been promoted through media. SPC Norway has today an extensive and active network in the industry.

A series of regional meetings along the long Norwegian coast has been arranged in cooperation with regional organisations engaging a total of 400 participants. In these seminars Shippers were challenged with the questions: "What was their requirement regarding transport quality and service and what had to be changed if they should choose sea transport? "

Cooperation with other actors in the field to unite efforts and avoid overlapping has been emphasized. Among others SPC Norway has worked closely with the interreg-projects Northern Maritime Corridor and Remarcc in addition to activities organised by the Coastal Administration, Marintek (maritime research) and other organisations.

Specific and practical initiatives to simplify sea transport and to promote cost reduction in the transport chain have been taken. The project "Efficient Transport Chain" – more information on www.shortseashipping.no/etc - was the basis for introducing the idea of message standardisation leading to the "Shortsea XML" initiative. This is now a pan-European project applying for financing from "Marco Polo / Common Learning" - see www.shortseaxml.org

In cooperation with the Norwegian Focal Point we have contributed in the Commissions bottleneck exercise that was re-launched in 2005.

SPC Norway has been an active partner in the European Shortsea Network.





Polish Shortsea Promotion Centre was registered on July 9th, 2000. During the past five years its activities were correlated with either those initiated by European Commission and/or programmed by the European Shortsea Network. It has achieved a neutral body status. SPC own initiatives were targeted and addressed to the local maritime industry and companies associated with. Yet, the SPC's more efficient contribution into EU's programmes and actions were handicapped by the lack of EU's budget funding during the pre-accession period, i.e. until Poland was faced in the European Community (since May 2004).

The Programme for the Promotion of Short Sea Shipping [COM(2003)155 final dated Brussels, 07.04.2003], presented by the Commission as a proposal and accepted at a later stage as the recommendation by the Member States, still requires to be implemented to the necessary extent by the Member Countries, like Poland for example. We consider the years of 2005-2006 as the post-cohesion period and a real cohesion will commence since 2007 onwards with a public funding potential based upon and correlated with the National Development Plan 2007-2013. The NDP 2007-2013 includes regional development programmes which unnecessary are covered by the public financial means what in consequences can delay some priority actions like those related to: congestion limitation, new technologies, trans-european network, urban transport, etc. SPC,

Poland undertook some initiatives vis-a- vis regional authorities and parliamentary delegates actively participating in conferences and seminars. SPC continued efforts to further strengthen co-operation with 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; Polish Chamber of Maritime Commerce, Polish Shipper Council, Polish Shipowner Association, Polish Chamber of Forwarding and Logistics, Maritime Academies and other High Schools.

We supported ESN members' view that intermodal and inland transport issues have to be dealt by the same ESN SPC organizations as a package under the DG-TREN guide and supervision.

However, the vital point of existence for our organization is financing. We are not supported till this moment neither from Polish governmental sources nor from the sources of European Union. Despite the efforts we have made, we have not been successful in acquiring positive attitude to our activity from the side of National Focal Point. That is a pity that despite our hard efforts, financing remains practically only limitation of a range our activity. But we trust however, that importance of our mission is of that sort that incidental problem must be solved in spite of the future profits that Community can achieve.



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 very conservative in its spending which in any case doesn't help to put in force all the projects which we think would favour the promotion of the SSS allowing to achieve our common target.

Due to this fact in 2005 the Promotion Centre didn't organized any Seminar as in the previous years, but his President and Executive Director have been invited to participate as speakers in several Seminars within the Portuguese

Transport Sector. Also they have been involved in writing several articles in local magazines and newspapers where they had the opportunity of highlighting the importance of the modal shift from road to sea for a peripheral country.

The Portuguese Shortsea Promotion Centre has been also involved together with the Portuguese Ports, Customs and Ship Agents in developing a computer network and system allowing all the information to flow much quicker within the transport chain avoiding as possible several usual bottlenecks which doesn't exist in the road transport. This facility should be in force by mid July.

Finally the Portuguese Promotion Centre Executive Director, 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.



2005 has been a year of transition. Between the modal shift model advocated in the White Book and the concept of cooperative intermodality, between the Marco Polo I and the Marco Polo II and the TEN-T's funds.

The SSS is passing from the short sea shipping services model, with few incentives, to the essay of the integration of these services with the infrastructures and other services, to be creditors of more incentives, in what is called Motorways of the Sea, even if in this moment there is not a clear definition of this figure that can clear up the uncertainties.

The first impulse of the Commission has given way to the good will of the Member States to try to give sense to the Motorways of the Sea project; meanwhile the new Energy and Transport Commissioner requests a higher effort, specially the financial one, to the Member States, according to the conclusions of the Ministerial Conference of Ljubljana, on Motorways of the Sea.

In Spain can be emphasized the work done by Puertos del Estado in this context, that, as the conclusions of this Conference has gathered, has allowed to Spain keeping the leadership on the concretion process of the respective quality criteria at European level. A declaration of intent has been signed with our neighbour country, France, in order to elaborate the baselines of the call for tenders destined to choose the elements which will be part of the Atlantic Motorway of the Sea.

At the same time, conversations are being developed with Italy with the same purpose related to the Western Mediterranean Motorway of the Sea.

As well, two studies are being drawn up in relation with these Motorways of the Sea, ATMOS and WESTMOS, financed by the European Commission.

Also, the business parties have put in service 24 SSS services in Vigo, Santander, Gijón, Bilbao, Pasajes, Barcelona, Tarragona and Valencia ports, given by 12 companies. Some other services are being studied from other ports.

Some of these services have favoured, for example, that some ports, like the one of Barcelona, has multiplied for six the volume of goods transported in SSS services, reaching 2 million tons.

It has to be emphasized also, that the Transport Ministry has granted to our SPC the necessary funding to draw up two studies endorsed by our Board, which are already moving on:

A Costs and transit time Simulator for intermodal chains between Spain and the UE countries, which includes a market study of the new Member States, as a useful tool to take decisions about intermodal alternatives, and a survey about the requirements that SSS terminals need to have.

In the last results of Marco Polo call, five of the twelve projects chosen to be funded are related to Spain.

Two services of SSS Ro-Ro, a service Lo-Lo, a service of break bulk, and a common knowledge project, related with the information interchange between the agents of the SSS chain.



SPC Sweden



Sweden acted during 2005 as the treasurer for the third grant from the EU Commission. The final report was drafted and we had an intense period with contacts around the network.

We in the same capacity as treasurer made the application for tutoring the new members state's SPC. A selected number of old SPC's are acting as tutors.

Sweden has participated in several conferences in Sweden, Denmark, Lithuania, Bulgaria and Spain abroad to present and the message from EU and the Swedish Ministry.

I am also Focal Point Short Sea Shipping and thus very engaged in making the maritime alternative less troublesome. To move a trailer between two points within the EU is often easier than the maritime alternative.

At the autumn meeting with the Focal Points we as SPC's were also present. The slide show made by some of the SPC's became a very useful tool that I have used in many cases.

The Swedish exporters are now days very well aware of the maritime alternative and we see a major growth in the traffic. The majority of question to our SPC are from importers especially bringing cargo from southern Europe to Scandinavia. Most contacts with other SPC's are from this area. We are also replying to questions for traffic to St Petersburg.

The initiative for the concept of Motorways of the Sea has been very well received and we have been a speaking partner for our maritime administration forming applications to EU and assisting in several presentations and studies.





Sea and Water incorporates the UK Short Sea Promotion Centre and was established in July 2003. Given its autonomy, broad mandate and tripartite structure, Sea and Water is particularly well placed to promote an integrated and multi-dimensional approach to waterborne freight. We undertake a wide variety of industry related activity, such as conferences, seminars and discussions within our expert working groups. Such activities ensure that we are able to act as an acceptable medium for the expression of the industry's opinions. The organisation has become a knowledge base, collating information on matters relating to waterborne freight, as illustrated by our reports and submissions to government, parliamentary committees and media.

With the primary aim of developing the water freight market, Sea and Water's main activities are:

Policy:

Ensuring optimum policy conditions are in place and being applied effectively to encourage water freight at European, national and regional levels.

Promotion:

Promoting the water freight industry in its widest sense to customers, analysts, and the media.

Assistance:

Providing advice to our members and others; developing as an information resource for the industry.

Research and Information

In a continuing programme to encourage more freight onto water, Sea and Water launched two new products in November 2005. The *Business Information System* provides user-friendly information for the industry and its customers. The system contains a series of maps and charts which allow users to view the exact location of all the services described. Our first publication the *Water Freight Review 2005* presents a unique examination of the industry through a period of dynamic change. Its comprehensive and accessible text seeks to inform at numerous levels, providing an ideal tool for practitioners, analysts and policy makers alike.

Communication

Our primary task for 2006 is to concentrate on communication as an essential ingredient in the promotion of the industry. Traditionally the industry tended to rely on its own perspective but we can no longer afford to be inward looking. We need to deliver the right promotional messages to the wider business community and the general public. The working team at Sea and Water has already established an effective dialog with numerous institutions.

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