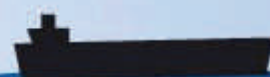




Annual Report 2006

A large graphic of the European Union flag, featuring twelve yellow stars arranged in a circle on a blue background. The graphic is partially obscured by the blue curved shape representing the sea.

*European Shortsea Network*

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







## Foreword

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Since we have published the last Annual Report of the European Shortsea Network, further growth has been achieved. Two SPCs from Croatia and Cyprus became official members of our European Shortsea Network in 2006.

Additionally the ESN fosters close contacts with recently established Shortsea- or Intermodal-Centres in Romania, Bulgaria, Lithuania, Estonia and Turkey. These Organisations already demonstrated their interests in terms of membership and further cooperation with the ESN.

This prepares our ESN for upcoming challenges caused by emerging markets in Eastern Europe and sets a basis for a broader presence especially in geographic areas without previous ESN-coverage.

The ESN achieved not only an enlargement regarding its number of members and covers now 18 European Countries, its members also committed their work more towards Intermodality and Comodality. This approach was agreed on the common meeting of the ESN and the European Focal Points in Brussels in October 2006 and perfectly meets the demand of waterborne-logistics-solutions, which usually depend on other modes of transport.

Supportingly a task force consisting of SPCs from Finland, Denmark, France, Belgium, Netherlands, Italy, Croatia, Malta, Poland, Portugal, Sweden and the U.K. elaborated a "Pre-Feasibility Study on Extending the Scope of Shortsea Promotion Centres into Intermodality" with an outcome that all ESN-members would appreciate a broader scope on different modes of transport or already working in such a manner. But persisting financial uncertainties of some SPCs already hampers their current work and limit their capacities.

Another earlier ESN-meeting which took place due to the Finnish EU-presidency in Finland 2006 was therefore mainly focussed on these financial issues and also on the cooperation of our ESN with the "Shortsea XML-Project" and the "European School of Short Sea Shipping (2E3S)".

Finally, we are confident that once financial difficulties of the affected SPCs are solved, nothing stands in the way for a further evolution of the SPCs towards "Intermodal-Centres".

SPC Germany  
Georg Waischnor  
Chairman of the ESN



## SPC Belgium



The SPC Belgium was founded in 1998 under the umbrella of Promotion Inland Navigation and has been developed since then as a non commercial intermediate party, financed 100% by the Flemish Region. Companies are consulting us for a wide spectrum of questions and problems : from a list of sailing opportunities to technical issues. Due to our quite extensive network, a large percentage of the questions can be answered.

Looking at the growing shortsea traffic figures we conclude that shippers, forwarders and logistic companies are choosing for a sustainable use of shortsea shipping. In 2006 more than 120.4 million tons of various shortsea cargo was handled in the 4 Flemish ports. This represents a growth of 6.5% compared to 2005. The sss- tonnage has increased by 36% since 1999, the first year of complete shortsea statistics in Flanders. More than 50% of the total cargo handled in the 4 ports is shortsea cargo. Also the sea-river traffic on the two main canals (Albertcanal and canal Brussels-Scheldt) is growing again, despite infrastructural bottlenecks hampering the development.

Certain initiatives were taken together with ESN-members. We organised a joint workshop in Istanbul, focusing on road transport and logistics. An information session with members of the Transport Committee of the European Parliament was organised, similar to 2005.

On certain events we also represented the European Shortsea Network, like on the roro conference and exhibition in Ghent (May 2006).

Based on the contents of the co-operation treaty between the region Flanders and the Baltic States, the SPC joined a logistic mission in November 2006 visiting Estonia, Latvia and Lithuania. Co-operation between the Baltic and Flemish ports and the establishment of a local SPC in Estonia and Latvia were looked at. It was agreed that an Estonian delegation, headed by the Port of Tallinn, would visit the Flemish ports in 2007.

The SPC keeps focusing on the bottlenecks : call- and port costs, flexibility of labour in the ports for shortsea vessels, pilot tariffs ... A half day seminar was organised on the conditions of a specific shortsea terminal, with attention to the mentioned issues. Certain local initiatives like an all weather conventional shortsea terminal have been started up.

One of the bottlenecks appearing in the European exercise – the fysical stop of coasters in the port of Antwerp on their way inland – was regularly followed up with the customs. End 2006 there was still no solution proposed.

The SPC continued approaching the different target groups in a very practical way via the newsletters, e-news, website (SPC and ESN), presentations, trade fair participations, visits to potential users...

Mid 2007 we will move to new premises :  
Straatsburgdok – Noordkaai 1a  
B-2030 Antwerp



## SPC Croatia

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SPC Croatia was founded in 2005. It was registered as association of legal entities the objective of which is Short Sea Shipping promotion and exchange of information related to maritime transport in the EU. The members of SPC Croatia are ports, port authorities, shipping agents, road haulers, logistic operators, Croatian Rail Company and shipowner companies.

In 2006 SPC Croatia was funded 50% from the memberships, and 50% from the Croatian Budget. Total budget for 2006 was 55.000 €.

SPC Croatia became a full member of ESN at the ESN meeting in Pori, in June 2006.

In 2006 SPC Croatia organized two important seminars in Croatia, in the port of Ploče in April, and in the port of Rijeka in November.

Representatives of SPC Croatia participated to the ESN meetings in Pori (Finland) in June, and in Brussels in November, as well as to the European Commission's Marco Polo seminar in Budapest in June 2006, and to the joint ESN and Focal Point meeting in Brussels in November.

Furthermore, SPC Croatia took part in the 'Fact-finding and Pre-feasibility Study on Extending the Current Scope of Shortsea Promotion Centres to Encompass Inland Intermodality Solutions Involving Rail and Inland Waterway Transport'.

In 2006, in cooperation with Maritime Faculty, University of Rijeka, SPC Croatia made a scientific study on possibilities of development of Short Sea Shipping in Croatia, containing suggested measures to encourage its development.

SPC Croatia arranged publication of a number of expert and scientific papers in Croatia on Short Sea Shipping and its promoting.



**SPC Cyprus**



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

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

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

Moreover information is still gathered in order to build the CSPC's website which will allow the Centre to promote itself in a more coherent and systematic way. CSPC is also closely cooperating with the CPA in relation to the promotion of the Motorways of the Sea in the East Mediterranean.

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

Within this context the Centre is expected to do the following:

1. Collection and dissemination of information, knowledge and education relevant to short sea shipping;
2. Formulation and participation in EU funded projects and the creation of awareness of EU policies, programmes and legislation that can assist private business in the expansion of short sea transportation activity;
3. Promotion of Shortsea Shipping policies in Cyprus;
4. Create awareness among all stakeholders – including government agencies, the business community, suppliers, logistic companies, shipping agents and the general public – on the potential, importance and relevance of short sea transportation to satisfy business, customer and national needs;
5. Establish the necessary mechanisms – organisation of fora, study groups and research – to identify barriers and make recommendations on how they can be diminished or removed in order to ensure the further development of short sea activity; and
6. Create awareness of EU policies, programmes and legislation that can assist private business in the expansion of short sea transportation activities.



## SPC Denmark

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Shortsea promotion Denmark is managed by: "The Maritime Development Centre of Europe" (MDCE), which have joint office management with "The Association for Promotion of Danish Shipping" and "The Danish Society for Naval Architecture and Marine Engineering".

MDCE is representing the maritime cluster in Denmark and our 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.

Shortsea Promotion Denmark/EMUC was involved in several maritime conferences in Denmark in 2006:

In Copenhagen 27<sup>th</sup> of February the conference "The relationship between The Ship owner, The Classification Society and the Danish Maritime Authority" was arranged by "The Danish Society for Naval Architecture and Marine Engineering".

The 30<sup>th</sup> of March a conference in Copenhagen with title "The Danish Maritime Cluster – an agenda for Growth" was arranged by MDCE.

The 25/26 of August a conference in Nyborg "Maritime Safety, Environment and Health 2006" was arranged by "Danish Maritime Occupational Health Service", Danish Engineers' Association, Danish Maritime Authority and MDCE

The 6/7 of December a conference "The Blue Denmark" which involved maritime research and innovation in Denmark was arranged in corporation with the Department of Maritime Research and Innovation. (MFI) in Esbjerg.

The Shortsea promotion Denmark is managed as a maritime network under the control of MDCE.

Denmark will also participate in the European Shortsea promotion Networks meetings, together with The Danish Maritime Authority and Ministry of Transport and Energy. Meetings in the Shortsea promotion Denmark network are being planned to further develop in 2007 as part of MDCE's strategy plan.

Together with the Department of Maritime Research and Innovation. (MFI). Shortsea Promotion Denmark is further investigating the research of Shortsea shipping.





## SPC Finland

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SPC Finland operates in the University of Turku Centre for Maritime Studies unit in Pori. SPC Finland's strategy is directed by the Executive Committee. The centre receives strong support from the entire intermodal transport chain including maritime, road and rail operators. SPC Finland is a channel of influence between industry and authorities, and it makes statements on legislation in preparation in the field of maritime transport in Finland and in the European Union.

### **Barometer for shipping companies**

SPC Finland published a first barometer on Finnish ship owners' views in November 2006. The barometer concerns Finland's international freight transport, and reports on the ship owners' views on status and on development needs on the branch. The barometer will be published twice a year. The first publication of the barometer gained a wide publicity on the Finnish media. The barometer is published in Finnish and Swedish.

### **Identification of bottlenecks and their solutions in shortsea shipping**

SPC Finland works on the solution of bottlenecks in shortsea shipping in close co-operation with maritime stakeholders and administrations as well as with the European Commission and the Finnish SSS Focal Point. In January, SPC Finland arranged a workshop in Turku to discuss bottlenecks and their solutions. Special attention was paid to customs issues, Russia-bound transportation, and the implementation of new environmental regulations. The workshop recommendations were reported to the European Commission. In 2006, SPC Finland contributed to a survey of the Finnish Customs on Authorized Regular Liner Service by circulating it to maritime operators in Finland as well as to the ESN.

### **Events**

SPC Finland arranged an international conference on Shortsea Shipping on the Baltic Sea – Prospects and Challenges in Pori, Finland, 7-8 June. The conference gathered together 160 participants from 19 European countries, representing ports, shipowners, shippers and other companies and authorities in the field of logistics. The meeting of the European Shortsea Network was arranged prior to the conference in Pori. Publication of the conference is available in print and on the website of SPC Finland.

SPC Finland had a stand at the Finland's main transport exhibition Transport&Logistics in May 2006 in Helsinki. Visitors were informed on transport solutions offered by shortsea shipping, on activities of SPC Finland as well as of the ESN. SPC Finland also had a stand at Logistics 2006 seminar that was arranged in Helsinki and Tallinn in February and at the Maritime Day in Mariehamn, Åland Islands, in October 2006.

### **Co-operation with the European Shortsea Network**

SPC Finland held the Presidency of the ESN during 1.2.-31.12.2006. A declaration was given on the aims of SPC Finland during the presidency. The aims included strengthening the status of the SPCs as well as the ESN, investigation of the possibilities for expanding SPC activities towards intermodal promotion and intensification of the network co-operation. SPC Finland coordinated in the ESN a Prefeasibility Study on Extending the Scope of SPCs into Intermodality and ESN Provision of Experts. These projects were realized as part of Maritime Transport Coordination Platform (MTCP) and financed by the EU 6<sup>th</sup> framework programme.





SPC France



SPC France (BP2S – Bureau de Promotion du Shortsea Shipping) was founded in January 2000.

The French Shortsea Promotion Centre is an independent non-profit association where members and financial supporters are public and private companies / organisations interested in shortsea shipping : ports, stevedores, shipping agents, shipowners, ship operators, freight forwarders, road transport, shippers associations, inland navigation, etc. as well as coastal regions and French Ministry of Transport.

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

Our main purpose is to encourage freight off the congested road network onto the environmentally-friendly and sustainable modes such as shortsea, coastal and sea-river shipping, and inland waterways.

#### Changes in 2006

SPC France has moved in 2006 into a new phase of its development, marked by a revamped organisation : in May, a new board was elected with a shipowner as President and a freight forwarder as vice-President, a three-year action plan was also launched on this occasion.

#### Action at national level

- We have maintained our weekly electronic newsletter directed to our members.
- A series of presentations of national and European initiative to enhance short sea shipping was delivered through conferences, meetings, round tables, directly or indirectly involved in our sector.
- Workshops focussing on potential synergy between inland haulage and shortsea shipping were also organised in relation with Motorways of the sea.

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

In addition, several press releases were published by SPC France on specific matters (eurocontainer / 45' Pallet-wide container, 7<sup>th</sup> Framework Programme, Marco Polo II, European School of Short Sea Shipping, etc.) and widely circulated.

The consequence of these various actions is an increase of inquiries and requests to SPC France as well as specific questions targetting Motorways of the Seas initiative, Marco Polo programme or European consultations.

#### Participation in ESN meetings

SPC France has been quite active for contributing developing and enhancing co-operation between the SPCs, with participation in all ESN meetings and in other conferences organised by members of ESN.

It also participated with other SPCs in meetings with the European Commission and with the European Parliament Transport Commission.

#### Support to ESN and SPCs common projects

SPC France assisted the ESN in its common projects ("survey on the use of regular liner services permit", "pre-feasibility study on extending the scope of SPCs into Intermodality", etc.)

SPC France also assisted in projects involving several ESN members such as

- "Shortsea XML", with Norway as coordinator,
- "European School of Short Sea Shipping", with SPC Spain coordinating the project within the ESN and SPC France organising informative meetings and participating at the inauguration session with a delegation of French universities, training centres and journalists,
- "ACCESS" (Advanced Contact Centre for the Enhancement of Shortsea Shipping), with Italian partners and SPC France organising workshops in Toulon, Calais and Marseille.

#### Support to EU shortsea and intermodal initiatives

SPC France attended DG TREN conferences covering intermodality.

SPC France was also the co-organiser, with DG TREN and the Port of Nantes, of the first international Conference Marco Polo II "A support programme for sustainable transport solutions" held on 30th November / 1st December in Nantes (France)

More than 300 participants from 28 European countries participated in this successful event.



## SPC Germany



Last year the German SPC went through a first major change after its foundation almost 6 years before. Roland Schneider left mid of 2006, he was therefore replaced by Karim Tönnies.

As a consequence of an increasing number of enquiries and an extended intermodal focus on Shortsea Shipping and Inland Navigation, SPC Germany has also employed an additional employee. His name is Christian Betchen and he used to work for a domestic logistics corporation. Christian Betchen mainly deals with the Inland Waterway Systems.

This extra staff member is funded for 50% by the German Federal Ministry of Transport, Building and Urban Affairs and 50% by the German cooperation "Initiative Binnenschifffahrt und Logistik" (Initiative for inland shipping and logistics).

In order to present these changes clearly to the market, the logo of SPC Germany has been adapted and the name enhanced to "ShortSeaShipping Inland Waterway Promotion Center".

Like 2005 SPC Germany faced in 2006 an increasing interest for ShortSeaShipping and inland waterborne transport from domestic industries and forwarders. Effects like shortages of transport capacity in road transport, missing truck drivers and the introduction of the digital tachograph further increased the demand for alternative modes of transport like ShortSeaShipping and Inland Waterways.

### Important Key figures

The annual number of about 200 individual inquiries from shippers and forwarders and the avoidance 150.000.000 tkm on European roads means that the German SPC helped to avoid just in 2006 as many tkm as in the past 5 years.

### Dissemination

Through various actions the new SPC-Team addressed present or upcoming decision-makers:

- A new 8-page leaflet which describes the opportunities of the two modes of transport and the work of the SPC was produced and widely spread during personal meetings, presentations or via Internet channels.
- 81 German chambers of Industry and Commerce and regional groups of the German Logistics Association (BVL) have been contacted. Various presentations in front of decision-makers from industry and forwarders have been held.
- German Universities with logistics background have been contacted and presentations have been held in front of upcoming decision-makers.
- A 3-step workshop-programme of the German SPC is on its way. It aims at the recognition of transport needs of forwarders and shippers and the creation of intermodal-solutions under contribution of Shortsea and Inland navigation through stronger networking between Providers and Customers.
- Heads of logistics from various German businesses with different product-portfolios and without previous SPC-contacts have been addressed. Afterwards first appointments for consultations have been achieved already.

Furthermore major-projects like the creation of a logistics scheme for the local government of North Rhine-Westphalia in the aftermath of hurricane Kyrill and in cooperation with the German Association of Inland Ports and the German Inland Navigation Association have been achieved. As there was an overwhelming need for transport capacity and not enough road transport capacity available. The outcome was that only short hauls need to be done via road transport to surrounding inland ports and the long distance transport may then be managed by inland shipping.

This activities have started in 2006 and will carry on in 2007, consequently SPC Germany anticipates a further increase in all its key figures i.e. goods diverted, especially fuelled by market developments like the new European Drivers Hours Law which has started April 11th 2007.



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.

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. In this regard we contribute to the E.U Commission exercise, to overcome bottlenecks in European ports.

Our Center was also participating in the efforts to get a solution to the problems caused by the workers of the Port of Piraeus (they refused to work overtime during November, December 2006) resulting in the dramatic decrease of the cargoes moved via Piraeus.

During 2006, 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.

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.

The Center provided to its members regular and updated information by circulars on short sea shipping matters, included in:

- National legislation
- E.U. legislation
- IMO developments e.t.c.

In order to enlarge our association and to promote further SSS, we worked on the transformation of our association so as to attract more members for the SSS sector.

The Center followed and participated in the ESN activities.

Our main target still remains, that short sea bulk shipping has to play a key role in the South – East Motorway of the sea.



## SPC Holland



The demand for information on shortsea services is still growing; that becomes apparent from the evaluation of the activities in 2006. The SPC Holland received more enquiries in 2006, had more visitors on the website, the search engine liner services and the freight enquiry system. The future looks bright for the Dutch SPC. More cooperation between modalities- in any case in the information supply, restrictions for road transport and the shortage of driver will have the result that also in 2007 companies will investigate alternatives for the transport of their cargo in Europe.

In 2006 the number of enquiries has increased again in comparison to the previous year. The increase was 13.4%; an all-time high. In total the bureau received 533 enquiries (in 2006: 470). Two things are worth mentioning; firstly more requests for general information were received and secondly more companies made the enquiries. These are companies from the primary target group, but also companies working in the sector (384 in 2006 vs 257 in 2005).

### Savings of 14 million road ton/km

All enquiries that are done at the Shortsea Promotion Centre are followed-up. The saving of road kilometres is at least 14 million ton/km in 2006. This is only a part of the total savings; because orders can have sequel orders and/or companies can do their own search via the website. These sequel orders and enquiries cannot be followed by the SPC.

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

The website receives more and more visitors. In 2006 the number of unique visitors rose with 10 per working day and calendar day. The average number of visitors per working day was 48 in 2006. In 2006 the number of people visiting the search engine has almost doubled till on average 4 per calendar day and 7 per working day. The number of unique visitors of the freight enquiry system has more than doubled from 273 in 2005 to 549 in 2006. The number of enquiries, however, went down to 60, the same level as in 2004.

This means that the system has been consulted, but in the end no freight enquiry has been made. At least not via the freight enquiry system.

The website is an important means of communication of SPC Holland and is updated every year. The European country maps – under destinations, liner services – have been renewed and the links to the websites of the ports have been checked. The data of terminals in Dutch ports have been checked and new ones added.

### Coupling of activities

The activities of the SPC were linked even more in 2006 than the previous years. The activities strengthen each other in this way. For the ShortSea Journal the themes have been re-introduced. The ShortSea Journal with Russia as theme, was also included in the mailing of the factsheet on Russia. The impression is that by combining these two publications the information gets more attention.

### Cooperation

This year the keynote was cooperation and the move to new premises. In 2005 discussions started with Railcargo information Netherlands (RCIN) on cooperation and the conclusion was that cooperation would be easier by having one office. This resulted in the move to Hoogvliet Rotterdam early January 2006. Former minister Peijs has opened the office by revealing the website [www.hollandintermodal.com](http://www.hollandintermodal.com). This portal gives an overview of all modalities that are offered in The Netherlands. In 2006 the discussions started with the Dutch Promotion Council of Inland Shipping (Bureau Voorlichting Binnenvaart) and RCIN about developing joint activities. In 2006 the first joint activities took place (see exhibitions and presentations).

A new PowerPoint presentation was made based on and with the colours of [www.hollandintermodal.com](http://www.hollandintermodal.com). For exhibitions a continuous presentation was made with mainly illustrations of all three modalities.



## SPC Ireland



The Irish Maritime Development Office (IMDO) of the Marine Institute is the agency responsible for the promotion and development of Shortsea shipping in Ireland. During 2006, the office continued to play an active role in the pursuit of promotion of shortsea policy in Ireland.

### Overview.

The Irish shipping services sector continued to make robust progress in 2006, buoyed by another year of strong economic growth. As a small open Island economy, Ireland is heavily dependent on its short sea maritime services to connect it to the global market place. 2006 was an extremely active year with heightened levels of merger and acquisition activity, expansion of routes and capacity, new infrastructure developments and more competitive performance across the board. The high level of activity and changes underlined the competitiveness challenges facing some segments of the Shortsea passenger & freight business. The strategically important roro routes between Ireland-UK witnessed capacity restructuring, new operators, company takeovers and heightened competition from low cost airlines on the main passenger routes. A new operator joined the central corridor route between Ireland and the UK while the incumbent operators added capacity to their existing services. In 2006 the lolo sector underwent 30 structural changes 75% of which were positive. Some of the major developments included DFDS acquisition of Norfolkline towards the end of the year resulting in consolidation of services from Ireland. DFDS now offer a full door-to-door service for the Irish market. Europe Lines set up a new weekly container service between Drogheda and Rotterdam. The majority of the lolo operators increased capacity on the routes most notably MSC increased capacity with 4 ships all over 1,000 TEU now serving the market.

The IMDO estimate that in 2006 the shipping services sector employed about 8,300 people, in 315 companies with a combined annual turnover of €1,69 billion. 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 2006 especially in the unitised trades. Both the wet & dry bulk sectors at Irish Ports grew marginally by 1 per cent, although this figure

masked the exceptional growth in the smaller regional ports of up to 34%, while the unitized sectors of lo-lo and ro-ro recorded 12 & 8 % growth respectively.

Other noteworthy highlights during 2006 included:

### Market Research & Industry Development

- As part of its statutory remit the office provides day to day expert policy advice on development and coordination of shortsea and shipping policy to the Minister and Government officials.
- The IMDO in 2006 published 8 shipping reviews as a complete series detailing traffic, bilateral trade and business between Ireland and other European countries.
- The office provided strategic support to shortsea companies with the development and establishment of new liner shipping services in both the roro and lolo sector. There were 30 changes to key routes in 2006.
- The office was appointed as a member of the Irish Governments steering Group to assess future unitized port capacity projects in Ireland.
- The IMDO published the 3rd Annual Irish Maritime Transport Economist in May.
- The office supported two major overseas marketing initiatives by Irish companies and shipping services providers.
- In September 2006 the IMDO commenced a strategic review of Irish Maritime Transport policy hosting extensive consultation with the Irish Maritime Cluster.
- Our E-based strategy continued to prove extremely popular with an excess of 763,000 hits on IMDO web portal – representing a 13% increase on 2005 and the fifth consecutive annual increase of web traffic. The office hosts an interactive platform that provides information to consumers on shortsea shipping routes, services and operators.
- The IMDO launched the "Follow the Fleet" web portal in May aimed at raising interest and awareness of the Irish commercial shipping sector amongst pupils of primary schools in Ireland.
- All details of publications, business support and information services are available on [www.imdo.ie](http://www.imdo.ie)

For further details on our shortsea programme contact us at [imdo@marine.ie](mailto:imdo@marine.ie) or visit our website [www.imdo.ie](http://www.imdo.ie)



**SPC Italy**



### Actions performed at National Level

#### Promotion activity of the SPC Image

- Production of the Newsletter 2005/2006 of the Office; Activation of the circular service "News from Ue and the world" addressed to the partners Associations and their associated; Advertising on sectorial issues: "Avvisatore Marittimo", "Informatore Marittimo"- Le Autostrade del Mare; Issue of articles on the national newspaper "Portonuovo", "Avvisatore Marittimo", "Informatore Marittimo", "Professione camionista", "Rivista Mediterranea"; Press folders; Personalized pens, Personalized lapis, Personalized block Notes "Ufficio Nazionale di Promozione Short sea shipping- SPC ITALIA".

#### Meetings and Conferences

- **TRANSPOTEC 2006** International Trade Show on Technology applied to Road transports, Intermodal Services and Logistics. Stand SPC Italy with a part dedicated to the ESN. SPC Italy organized a Conference "Motorways of the Seas, the Italian model";
- **GLOSS** (general logistics Operations for SSS)- On board classroom on the route Civitavecchia-Barcellona- Civitavecchia;
- **SITL 2006**, International Trade fair on Logistics and Transports, Verona 2006  
Stand SPC Italy with distribution of informational material, folders, brochure SPC Italy and ESN, gadgets;
- **Postgraduate 2006 SEA MASTER in "Law and Economy of the Maritime sector"** University of Teramo" in collaboration with the Pescara's Chamber of Commerce;
- **Postgraduate 2006 Master on "Logistics and Transports"** Università Partenope di Napoli, "Motorways of the Seas and Ecobonus".

- **PRESS OFFICE** Activity
- **WEB SITE** and **GREEN NUMBER**
- **DEVELOPING CONTACTS AND COLLABORATIONS**

Collaboration with the Spa RAM Società Rete Autostrade Mediterranee, having regard to its direct connection with the Italian ministry of Transports and moreover its convergence of purposes. Signed a Memorandum of Understanding in 2006 - SPC Italy and RAM - in order to carry out studies and projects dealing with MoS; checking activity of information and data. Collaboration with UNIONTRASPORTI and the Italian chamber of Commerce, Transports Division. Developing contact with the Italian Public Administration of Provincia di Modena, which will enter to be a partner of the SPC It. having regard to their aim to develop projects on the topic of inland waterways.

### Actions performed at European Level

#### ESN (European Shortsea Network)

Meeting with SPCs/FoP/EU:

- Helsinki June 2006 ESN Meeting
- Bruxelles June 2006, meeting with MEP, Transports Commission
- Bruxelles October 2006, 3days meeting with Focal Point organized by DGTREN EU Commission

#### INTERNATIONAL ACTIVITY

- Participation to the "Prefeasibility study on the extension of the SPCs aims at the promotion of intermodality"
- TRANSPOTEC 2006 Stand representing ESN at the Trade Fair
- Issue of article on the Port of Barcelona website



## SPC Malta



SPC Malta was established in 2005 as an independent unit within the Ports Directorate of the Malta Maritime Authority. This was necessary in view of the fact that there was a lack of stakeholders that were ready to share in its establishment and provide the necessary financing. However, following the work of the MSPC, particularly in promoting awareness among stakeholders on the EU's objectives in the maritime sector, during year 2006 membership in the MSPC has increased significantly. Various stakeholders from the shipping industry were approached, providing them information about SSS and its potentials.

During the year under review, SPC Malta was active in many activities, both locally and initiatives within ESN.

In order to achieve its objective, the MSPC has carried out various tasks. It has consolidated the work of the MSPC through continues meetings with stakeholders and participation in the local workshops on intermodal logistics and maritime connections.

Concentration was focused on the promotion of shortsea services and supporting the shipping and ports industry initiatives that are aimed at the growth of maritime transport. Bottlenecks in the maritime sector were identified and recommendations were made on how they can be diminished or removed in order to ensure the further development of short sea activity. The MSPC website has been developed so it would allow for a better means of promoting its activities and inform stakeholders of developments. It has participated in ESN projects, particularly the drawing up of a feasibility study on logistic centres and provided information to the ESN database. Another active participation involving MSPC was in the work for the establishment of a master plan in respect of Motorways of the Seas in the East Mediterranean.

It is the aim of the MSPC to continue to expand on common guidelines of shortsea network, followed by continuous efforts and on wide range of activities such as information provision, promotion, cooperation with member states, setting targets, active participation and awareness of significant matters.



## SPC Norway



Shortsea Promotion Centre Norway responds to an European Union initiative for the promotion of short sea shipping. SPC Norway is an associate member of the European Shortsea Network. SPC Norway is organised as a project under the Maritimt Forum umbrella and has been mainly financed by the Norwegian Government with a certain industry support.

Our main national asset and tool is the Maritimt Forum network, comprising 600 companies and organisations from all areas of the maritime community. By combining our efforts with those of the members, we are strengthened in our ambition to inform about the benefits of Short Sea Shipping. The overall aim of the SPC Norway is to contribute to an increase in waterborne transport in co-operation with other actors in the field of transportation. A dual goal is that the special circumstances of Norway will be taken into account at European level.

In order to disseminate knowledge and interest in Short Sea Shipping we have participated in major events and seminars with the objective to implant the shortsea transport idea in all our contacts with associates, members and other parties. Please find the main activities in the year 2006 below.

### **Maritime Industries Forum 2006**

By invitation of the Norwegian Maritime Forum, with the support of the Norwegian Government, the European Commission held the Plenary Session of the Maritime Industries Forum (MIF) in Oslo 5 and 6 October 2006. In connection with this session SPC Norway invited Member States representatives to a dinner and to participate on the conference.

### **European Commission**

SPC Norway participated actively regarding Norwegian comments on the EC Communication (2006) 380/final Mid-Term Review of the Programme for the Promotion of Short Sea Shipping and EC Communication (2006) 336/final Freight Transport Logistics in Europe – the key to sustainable mobility.

### **European Shortsea Network**

In 2006 SPC Norway participated on ESN meeting in Pori in June (Finland) and in Brussels where a separate ESN meeting was held in connection with a Focal Point

Meeting in October. Furthermore, SPC Norway participated on the Expert assistance to develop the European Shortsea Network and enhancing European co-operation between SPCs and to develop the necessary base of knowledge towards creating intermodal and shortsea promotion centres.

### **Shortsea XML**

The first months in 2006 were utilized to complete the Marco Polo application for the project Shortsea XML. Several meetings were arranged with key players in the market. In 2006 the Norwegian company NorStella was selected as new project lead partner. The project was presented in connection with the ESN meeting held in Brussels in October 2006. For more information please visit; [www.shortseaxml.org](http://www.shortseaxml.org)

### **Motorways of the Sea**

All SPCs are asked to be part of the marketing package for the concept Motorways of the Sea. SPC Norway will participate when appropriate.

### **National shortsea activities**

Ålesundkonferansen, October 2006 – this is an annual meeting place for players in the transport sector and ports. SPC Norway arranged a separate conference concerning the challenges of short sea shipping at the end of the conference.

The Stavanger region as logistics hub, from vision to action. A seminar arranged by SPC Norway in cooperation with Maritimt Forum in Stavanger in November.

SPC Norway held a presentation “from road to sea” at a membership meeting arranged by Maritimt Forum in Oslo in October.

### **Communication Strategy**

In 2005 The Norwegian Institute of Transport and Economics was commissioned by the Norwegian Government to evaluate SPC Norway (cf. Report 773/2005). With reference to this report the board of SPC Norway decided autumn 2006 to develop a new communication strategy.





## SPC Poland



The year of 2006 was another one in an effort to further extend the number of supporters of the SPC Poland and widen the scope of contacts within the ESN.

SPC was closely co-operating with stakeholders indicating opportunities for shortsea services between the Baltic Ports and those in the North Sea and Biscay Bay to facilitate the transfer of hundred of thousands of tonnes of break bulk traffic from roads to sea.

Since May, 2006 the Baltic Sea became a SECA, following IMO legislation, resulting in an obligation for ships operating in this area to have reduced Nox and Sox emissions, i.e. 1.5 % sulphur in heavy fuel what, however, should not be an obstacle to a further development of the short sea services.

The 2001 White Paper, European transport policy for 2010: time to decide, set out 60 practical measures designed to improve quality and efficiency of transport in Europe by 2010. Promotion of intermodal and combined transports in form of motorways of the sea to make freight transport more efficient and environmentally friendly was another target which was extensively campaigned by the Promotion Centre. By the SPC recommendation these tasks were inserted into a newly elaborated project of "The strategy of development of Polish maritime transport till the year of 2015".

There are the following subjects on the SPC priorities' list for the year of 2007:

- EU customs harmonisation procedures - a Single Administrative Document Harmonisation (SADH)-supportive action towards electronic "single point lodgement" in accordance with the Regulation (EC) no 2286/2003
- Marco Polo II programme 2007 - grant assistance
- Incorporation of the Motorways of the Sea new corridors linking the Polish and Swedish Ports into the regional Baltic Sea spatial strategy
- Traffic avoidance actions through identification and elimination of bottlenecks

These actions should also assist the National Focal Point initiatives aiming at lessening road congestion and promoting sustainable transport development in Poland.

SPC Poland is a co-organiser of the national Vth Scientific Conference "Baltic Ports and shipping companies future possible development on the European freight logistic market" to be held in Szczecin on the 17<sup>th</sup> of May 2007. In its programme a clear reference is being made to the National Strategic Framework Programme for the years of 2007-2013. An intended discussion will concentrate on a subject how to improve know-how and expertise, towards a better utilisation of EU available grants in Poland, through assistance which should allow a private sector to develop the waterborne services and infrastructure.

SPC Poland considers the EU Council conclusions on short sea shipping, adopted at 2772<sup>nd</sup> TRANSPORT, TELECOMMUNICATIONS and ENERGY Council meeting at Brussels on 11<sup>th</sup> December, 2006 as vital ones for the implementation of the Programme for the Promotion of SSS. Its monitoring should be continued in close interaction between the Commission, Member States, ESN, industry representing transport users and service providers.

Last, not least, the need to obtain appropriate financial means to ensure a good functioning of SPC has forced the SPC Management to undertake several non-core activities which are expected to bring a positive financial result by the end of 2007.



## SPC Portugal



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

During the year 2006 the SPC – Portugal has been involved in several initiatives both within the country and abroad such as:

- ❖ Coordination of part of a Seminar (Shortsea shipping and the intermodality) dedicated to the Maritime Transport in March in Oporto.
- ❖ Organization of a Seminar in December to disseminate the program Access
- ❖ Elaboration of a study about the maritime transport and in particular the SSS in Portugal for the Economic and Social National Forum
- ❖ Participation and work under the coordination of SPC – Finland in the Pre-feasibility study on extending the scope of Shortsea Promotion Centres into intermodality.

- ❖ Coordination of the Portuguese group invited (4 Universities, the National Logistics Association, the National Road Hauliers Association, the National Freight Forwarders Association and 2 journalists) to the inauguration of the European School of Shortsea Shipping.op
- ❖ Coordination of the Shortsea Shipping Working Group within ECASBA (European Community Association of Ship Brokers and Ship Agents).
- ❖ Participation in the Committees of Maritime Transport and Logistics within the International Chamber of Commerce.

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

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



## SPC Spain



Year 2006 has been a period of great activity in the promotion of the Short Sea Shipping and the Motorway of the Sea, as much at European level as at national level.

In the national context it is necessary to emphasize the increase of the volume of merchandise transported by the existing services of SSS: more than 6 million tons. Half of it in the Mediterranean.

The Intergovernmental Commission created with France by means of an agreement for the study and definition of the sheet of conditions for a public call for tenders for the awarding of services of SSS in the Motorway of the Sea of the Atlantic, led by Spanish part by Ports of the State maintained its works throughout the 2006 with the objective to make public earlier this year this sheet.

Conversations with Italy they have been kept and, probably, in a short period, an agreement similar to the signed one with France facing the Motorway of the Sea of the Western Mediterranean will be reached.

While, Italy, earlier this year has published a decree with the list of routes including in scope of the program of incentives to the roadhauliers who use the SSS, between which are those that link the Spanish ports of Barcelona, Tarragona, Valencia and Algeciras with Italy.

SPC Spain throughout year 2006 has maintained its activities of promotion of the SSS in our country. Among other initiated actions, one of most important has been the organization of diverse encounter with the sector of road transports at regional level, with the collaboration of the CETM and the corresponding port Authorities.

First celebrated in Barcelona, another one in Vigo has followed it, being programmed others in Santander, Murcia, Algeciras, etc.

At the end of year, we could present the Simulator of costs of intermodal chains, result of one of the studies undertaken in 2006 with the financial support of the Ministry of Public Works, that already works in our Web, to the service of all those companies interested in knowing the possibilities the services of SSS in the routes that make.

Also the study on the requirements of a Terminal of SSS has been finalised. The results of both studies will be spread in seminars celebrated by the Spanish geography.

SPC Spain wants to emphasize, also, the beginning of the European School of Short Sea Shipping, by means of a project Marco Polo led by the Port Authority of Barcelona, with the collaboration of our Association. The formation is an effective tool of the promotion of the SSS.

SC Spain is also finalizing a strategic Plan facing to the reinforcing its action facing the the consolidation at internal and external level.



SPC Sweden



During 2006 the role and function of our Swedish SPC was evaluated by our Swedish stakeholders. Together with this study the initiative from DG TREN to possibly extend our activities to intermodal promotion was added.

The result from these activities which involved both the Maritime Administration and the Ministry is that we will continue as SPC, however it is still unclear how we should proceed with the intermodal ambitions.

Sjöfartsforum, SPC Sweden also participated in the intermodal study commissioned by BMT and SPC – Finland. This information has been very valuable.

During the spring of 2006 we had a stand and organised seminars at the Transport & Logistics Fair at Svenska Mässan in Göteborg. Our ESN slide presentation was running most of the time and many visitors came to discuss short sea shipping.

Our work for a more efficient intermodal cargo carrying unit continued. Together with the Swedish parliamentarians we participated in a seminar in the European Parliament on environment and modal shift. Sjöfartsforum urged strongly for the continued acceptance of the 45' PW container on the European roads.

Much to the satisfaction of the whole transport industry EU later in the year gave its approval to accept these units on our roads. Sweden is certain that this is a very important step for the development of inter-European maritime transport.

The rapid development in the Baltic Sea Region has been on top of our agenda during 2006. Sjöfartsforum participated in several seminars focusing on Poland and the Baltic States. Growth figures of 12-18 % of cargo in these lanes are common and many bottlenecks and best practises were discussed. TEN-T and Motorways of the Seas were always on the agenda.

Swedish and other shipowners used our ESN network to communicate extended services in the Baltic.

SPC Sweden also acted as treasurer and coordinator of the Grant "Tutor" given to five dedicated future members of ESN. We only succeeded with two, however we also contributed to several other new SPC's or Intermodal Promotion Centres in new member states. Besides the administrative tasks we were very active in sharing our experiences with several of these countries. We went to Varna in Bulgaria together with the Commission in order to progress their new SPC.





## SPC United Kingdom



Sea and Water was established to provide a representative voice for the short sea and coastal shipping industry as well as inland waterways, and to promote water freight as a viable alternative to the freight movements on the UK's roads.

At its inception in 2003, the organisation faced the challenge of bringing together a largely fragmented industry. Therefore in the first three years we have been focused mainly on the supply side (the operators). We have helped to promote knowledge within the sector, and understanding by Government of the sector and its difficulties.

Going forward there is a need to build on this core achievement by turning our attention to the promotion of short sea/coastal shipping and inland waterways. We have therefore set ourselves two additional challenges:

- To encourage potential users to choose water freight solutions;
- To address and influence policy decisions;

At the same time, we understand the need to increase our supporters and establish critical mass.

Sea and Water has moved into a new phase of its development, marked by restructuring within the organisation.

Over the next two years, our new principle objective is to reach out to a wider community, encouraging potential users of water freight, principally the retailers, construction business, power generators, manufacturers, governmental departments and other heavy users of freight transport, to change behaviour.

We already had meetings with Sainsbury and Sony Entertainment Ltd to discuss a potential modal shift. We are planning meetings with Tesco, ASDA and M&S in 2007.

Our main activities are focused on:

- Public affairs and communication
- Research
- Events
- European Short Sea Network

In 2006, we launched "The Case for Water" as a main lobbying tool. Also we ran a market survey to discover the business attitude and opinions towards the water freight transportation and organised a series of events. We participated in the pre-feasibility study to extend our activities to intermodality together with the other SPCs.

Sea and Water will continue to act as a conduit between the Government and the sector. It will also maintain its programme of research to uncover the information necessary to us, our supporters and others. More information, see at [www.seaandwater.org](http://www.seaandwater.org)



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