

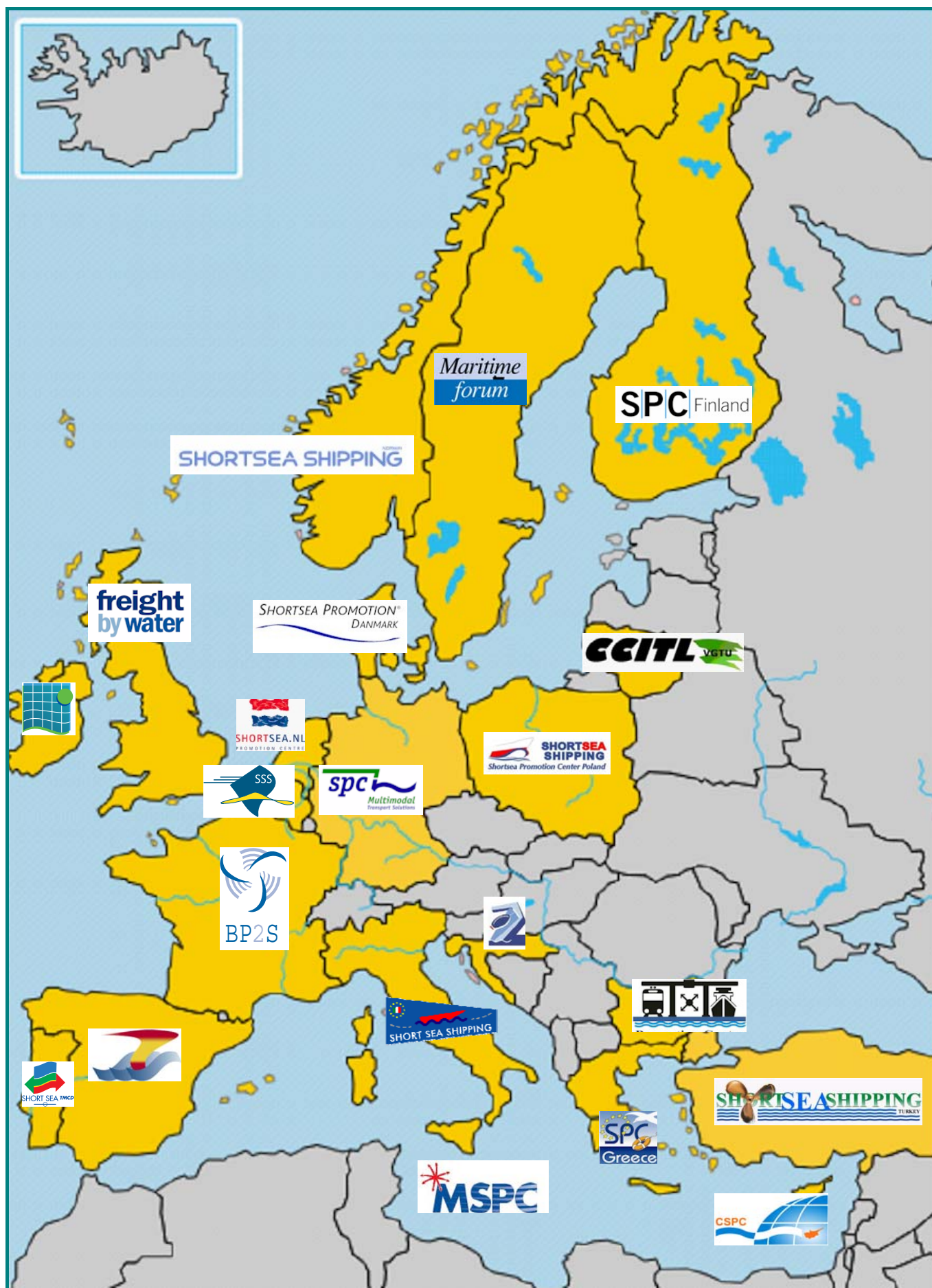


Annual Report 2009



European Shortsea Network
www.shortsea.info





 = Member of the European Shortsea Network (ESN)

Foreword



Foreword

Despite the crisis - or is it thanks to the crisis - the Shortsea Promotion Centres (SPC's) continued to be consulted on European maritime and by extension intermodal connections. In 2009 a lot of transport matters were put on hold or being re-discussed... Nothing from the past was "certain and untouchable" anymore, on the contrary the time was right to examine new logistic concepts preferably with lower costs... Although it was tough, shortsea operators tried to coop with this situation and maintained a respectful number of maritime sailings, being flexible as far as possible in frequency of sailings or ports offered in the schedule.

The market is more and more looking for "chain" solutions, combining different modes of transport. Certain SPC's are already transformed into intermodal promotion centres. Road haulier companies have become "intermodal providers".

The 21 SPC's active in the market in 2009 have various ways of financing and slightly different strategies but all of them have a network of expertise. These 21 networks of expertise are bundled in the European Shortsea Network. Bi- and multilateral initiatives are taken, best practices are exchanged, the Pan-European training in the European School for SSS is successful... Regularly there are contacts with the European Commission.

The very practical and neutral way the SPC's are working is very appreciated by the market. It is however crucial that sufficient financial means and manpower are available to continue as first point of contact for SSS. Unfortunately a lot of the centres are having very serious problems to stay alive. It is time action is taken, the alarmclock is showing 5 to 12!

As actual chairman of ESN, I wish to thank the SPC's for their contribution to this annual report 2009. I also express my thanks to SPC Sweden and SPC Spain who did a great job as chairman of ESN in between two issues of the annual report.

SPC Belgium
Willy De Decker
Chairman ESN (01/07/2010-31/12/2010)



SPC Belgium



In 2009 the SPC Belgium has continued to focus on the SME as an important target group and to help them choosing for shortsea shipping. We also focused more intensively on gathering shortsea best practices. These were published in our newsletter, on our website, in other media and were used in presentations. We want to focus further on best practices in the future.

On 19th October we launched our new on line database with regular shortsea services from and to the four Flemish ports. The number of readers of our communication tools grows. 6.302 addressees received four printed newsletters called "Aboard", a figure that can be multiplied by 2.6% to know the number of readers. Our e-news letters were sent to 2.763 addresses. Our website had about 190 visitors a day in 2009.



In June we organised a workshop on "Intermodality, it works" in Ghent together with the Dutch SPC. This joined workshop was a success as 44% of the 110 attendees were shippers and logistic companies, which are important target groups for us.

For the shortsea conference "What lies beyond 2009" in October, organised by the Antwerp maritime newspaper "DeLloyd" and the port of Zeebrugge, we gave our input and cooperation.

From 20 to 22 October we shared a stand on the "Transport & Logistics" fair in Antwerp with the Promotion Center for Inland Navigation where we could focus on our target groups of shippers, road hauliers and logistic companies.

As member of the Flemish Port Area working group we shared a stand on "Transport Logistic Tradefair Munich" from 12 to 15 May with the Promotion Center for Inland Navigation under the bigger stand with the four Flemish Ports. "Flanders

Port Area" is the name of the Flemish port concept that comprises the four maritime ports (Antwerp, Ghent, Ostend and Zeebrugge). This "Flanders Port Area" project allows Flanders to coordinate the promotion activities of the four Flemish ports abroad, thus allowing Flanders to promote all the assets of the ports located in this single region.

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

As a member of the Northsea Taskforce for Motorways of the Sea we launched a call for proposals out of the market.

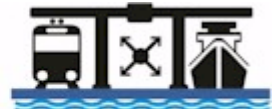
For the first time in eight years the SSS traffic in the Flemish ports has declined. In 2009, a volume of 118.7 million tonnes was shipped, which was 15 million or 11.29% less compared to 2008. However, the shortsea traffic figures registered by the promotion centre from January to June 2009 have improved markedly in the second half of the year. In the first semester the transport by shortsea dropped 18.70%. At the end of 2009 the decrease amounted to just 11.29%. Shortsea traffic in the Flemish ports has declined almost 3% less than the overall traffic (-14.27). The share of shortsea transport in the overall traffic in the Flemish ports has risen slightly compared to 2008 (from 50.11% to 51.86%).

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





SPC Bulgaria



Intermodal & Shortsea Promotion Centre

SPC Bulgaria is a non governmental, non profit and neutral organisation established in 2004 by main branch organisations: Bulgarian Association of Shipowners, Bulgarian Association of Shipbrokers and Shipagents, Bulgarian Association for Freight Forwarding and Logistics and with approval of the Ministry of Transport. SPC Bulgaria acts also as an Intermodal / Co-modality/ Promotion Center.

National level activities Main: Partnership with Maritime Administration and Railway Administration for improvement of regulation framework. Cooperation and common actions with partnership associations for improving transport business environment, exchange of best practices, regional and European cooperation. Update of membership services – new web site, monthly newsletter, monthly meetings with members, etc...

Regional level activities Main: Support for establishment of SPCs in Ukraine, Russia and Georgia. Partnership with RIA/SPC Romania for common SSS position and actions in Black Sea.

European level activities Main: Partnership with ESN and SPCs, more wide contacts with UIRR, EIA, ECSA, ECASBA associations. Participation in EU PROPS project development.

Short Sea Shipping promotion and development

Main task is improvement and development of short sea shipping/ maritime links in Black Sea. Black Sea Maritime Conference – Second Bulgarian Maritime Day 2009 put emphasis on new ferryboat links in Black Sea, especially rail ferry between Bulgaria (ferry terminal port of Varna) and Russia (ferry terminal port of Kavkaz). Meeting with high level ROSMORFLOT management. Were discussed: improvement and enlargement of Bulgarian-Russian maritime transport and port cooperation in Black Sea. Partnership continued in 2010. Other main task was improvement and integration of Bulgarian marine and maritime research to European maritime research area. Together with ECMAR, ENMC, CESA, EMEC..., a common partnership was discussed in European maritime research projects as well as establishment of marine and maritime research and development center in Varna. Center will start in 2010. Memorandum of establishment of Maritime Cluster Bulgaria was signed too. Maritime Cluster Bulgaria became a Member of European Network of Maritime Clusters.

Inland Shipping promotion and development

SPC Bulgaria paid attention to promotion of inland-Danube-shipping. Conference European Inland Shipping Day 2009 was held in Ruse. Main task was modernization and cooperation of Bulgarian inland shipping and ports; improvement of inland shipping education in Ruse and Varna as well as improvement of Bulgaria-Romania cooperation in inland shipping and ports.

As a result of the Conference Bulgaria became a member of EDINA (Education in Inland Navigation Association), enlarged participation in NAIADES/PLATINA project and was established BG-RO Danube Transport and Logistic Council. Bulgarian River Chamber in Ruse was established too.

Co modality/Intermodal promotion and development

SPC Bulgaria continue to participate actively in work of Co modality/Combined Transport Council to Ministry of Transport of Bulgaria in order to improve regulation framework on combined and intermodal transport. SPC Bulgaria discussed with NC Industrial zone establishment of intermodal / freight logistics area in Bulgarian industrial zones.

SPC Bulgaria supported EcoLogistics Ltd. in organization and establishment of first specialised Bulgarian intermodal terminal Sofia -Yana rail station.

Marco Polo Program and MoS promotion and projects participation

SPC Bulgaria initiated establishment of Working group to MT - Railway Administration for support of Bulgarian companies participation in Marco Polo 2 programme.

In the same time SPC Bulgaria participated in few projects as well as ESN Freight project.

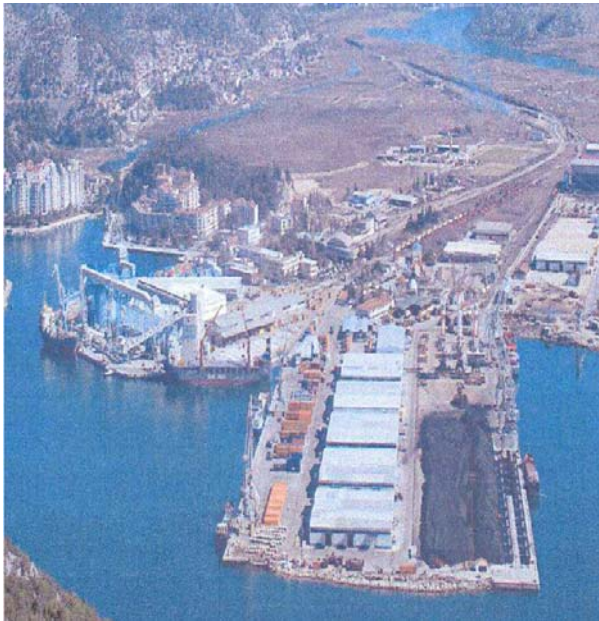
SPC Bulgaria take part and make promotion in a new European AID Office project for Black and Caspian Sea Motorways of the sea. Under preparation is a pilot project for Black sea MoS, in which Bulgaria will participate.





SPC Croatia

Short Sea Shipping in Croatia in 2009 was mostly present as feedering. As a matter of fact, all big Croatian ports were connected with HUB terminals of the central Mediterranean by means of feeder lines. Feeder lines have thus been operating between Croatian ports of Rijeka, Ploče, Split and Zadar, and Gioia Tauro, Malta and Taranto.



We have focused our activities on informing Croatian transport sector on regional and EU initiatives using direct and indirect methods. Within that, we have organised many workshops which resulted with several project proposals that were candidate on IPA and Marco Polo II calls. Accordingly, SPC Croatia is acting as a coordinator of transport sector related EU funds for Croatia and actively supports development of project proposals.

Due to European Commission recommendations we are providing "Bottleneck exercise" which contributes to increasing of efficiency, competency and future development of SSS services and intermodal transport system in general. We were actively involved in INTERREG III project which objective was to create a general plan for SSS development in Croatia and a web based liner database.

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





SPC Cyprus



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

During 2009, meetings were held with various stakeholders in order to create awareness of the EU's policy on short sea shipping, of the ESN and its objectives as well as of the Cyprus Shortsea Promotion Centre, its objectives and potentials.



During the year under review all efforts were concentrated on the promotion of the Centre's objectives among the local shipping industry. Emphasis was also given to the promotion of shortsea services as well as of the shipping and ports industry initiatives aiming at expanding further maritime transport. The main challenge of the centre remains to be the creation of more awareness and depiction of the centre, and as such its main aim is to continue to attract new membership. This will provide the Centre better position to enhance its awareness and be a credible and effective centre with relevance to the local transport industry while at the same time integrating the centre into the wider network of Short Sea Shipping.

Moreover the Centre's website is constantly updated thus allowing the Centre to promote itself in a more coherent and systematic way. Several promotional activities were held for the promotion of Cyprus ports industry and the ports infrastructure development programme, in an effort to promote further the use of Cyprus ports as transshipment hubs.



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





SPC Denmark



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

Shortsea Promotion Denmark has no public funding, but MDCE operates SPC Denmark as a part of its activities, to facilitate more activity and awareness of Shortsea shipping as well as cooperation between the various transport modes



The year 2009 has been a successful year for SPC Denmark/MDCE.

In 2009, SPC Denmark/MDCE initiated a 4 year project (the Transport Innovation Network) with its members and the Danish Society of Transport Economics. This is partly funded by the Danish Agency for Science, Technology and Innovation. The network currently has eight activities of which two are related to SSS: 'Intermodality, Short Sea Shipping And Port Design' and 'Vehicle- and Ship Technology (incl. Sustainable Fuels)'. SPC Denmark/MDCE is administrator and coordinator of the Network.

In 2009 SPC Denmark/MDCE organized the following:

- 15 meetings with members, around Denmark. All subjects have been maritime and 4 of the meetings have dealt with Shortsea Shipping. The Department of Maritime Research and Innovation (MFI) at University of Southern Denmark is performing research on Shortsea Shipping and Intermodality. They chair the network with Shortsea Shipping.

- 6 maritime conferences and seminars of which one conference was on international maritime economic research (IAME)

Projects In 2009 which SPC Denmark/MDCE participated in as partner, on behalf of the members:

- Northern Europe's trade, logistics and transportation cluster (NordLog). The aim has been to strengthen the logistic cluster.
- PRESS4TRANSPORT (Virtual Press Office to improve EU Sustainable Surface Transport research media visibility on a national and regional level) assists EU, National and Regional funded projects in communicating their surface transport research results to the media. www.press4transport.eu

In 2009, SPC Denmark/MDCE entered into a corporation with Iver C. Weilbach and took over the publishing of a Danish Magazine MERCATOR (Maritime Innovation, Research and Education). This is published 4 times a year. See more <http://mercatorinfo.dk/>

In 2009, SPC Denmark/MDCE gave 4 presentations at maritime conferences and seminars in EU. Subjects were Maritime Cluster Success, Maritime Research and Innovation and Transport Innovation.

Denmark has also participated and been active in the European Shortsea Promotion Network meetings.





SPC Finland



SPC Finland is hosted by the University of Turku Centre for Maritime Studies (CMS) unit in Pori. SPC Finland's Executive Committee consists of representatives of different transport modes, ports and ports operators as well as forwarders, which are represented by their associations and unions. In addition, Ministry of Transport and Communications and certain regions are involved in the Committee. Centre for Maritime Studies is chairing the Executive Committee.



The aim of SPC Finland is to develop shortsea shipping and intermodal transport solutions that combine shortsea shipping with rail, road and inland waterways. SPC Finland is a neutral channel of influence between industry and authorities. SPC Finland gives opinions on legislation in preparation in the field of maritime and intermodal transport in Finland and in the European Union.

SPC Finland offers **information on shortsea shipping and intermodal transport**, consisting of selected news on transport sector and on EU and national plans and activities which encourage the use of SSS and intermodal transport. The main information channel is the website www.shortsea.fi. SPC Finland's e-mail newsletters are sent monthly as a Finnish-Swedish version and as an English version. A theme bulletin *Maritime Transport and the Environment* presented current environmental issues with comments from Finnish shipping experts. A report on *Structure of Finnish trade and industry from the point of view of transport* was published in March 2009.

Shipping company barometer was published twice in 2009, to report on the ship owners' views on status and on development needs on the branch. Shipping company barometer gains a lot of media coverage in Finland, creating awareness in shipping. The barometer offers information to decision makers both at public and private sector. The barometer is published both in Finnish and Swedish.

SPC Finland is a contact point for **Marco Polo II programme** in Finland in co-operation with the Ministry of Transport and Communications. SPC Finland informs on the programme and advises the applicants on project proposals and ideas also concerning other possible EU -programmes, in particular TEN-T Motorways of the Sea.

SPC Finland organized **round table events** to support and create new dialogue between operators from different transport modes, shippers as well as authorities and politicians. SPC Finland arranged a seminar for the Finnish parliament members on intermodal transport. Intermodal afternoon -seminar considered development of intermodal transport. Baltic Sea afternoon -seminar concentrated on transport and environment on the Baltic Sea.

SPC Finland participated actively to the work of **the European Shortsea Network**. In 2009, SPC Finland attended the ESN meetings and the meeting of the ESN, SSS Focal Points and Commission as well as the Nordic SPCs' meeting.





SPC France



Presentation

SPC France was founded in January 2000. The Centre is an independent non-profit body serving the interests of its members, funded by them and other contributors. Those who support us are companies from both private and public sectors, as well as other organizations involved in short-sea shipping and intermodality: shipping agents, ship owners, freight forwarders, road hauliers, inland navigation, shippers, ports, the French ministry of transport, coastal regions, among others.

With limited resources, SPC France operates with a lean team: in 2009 we had 2 full-time employees. We brought on student interns to help us with some support work, such as in updating our data base, and organizing meetings and conferences.

SPC France with its Members

In 2009, we continue to publish a weekly electronic newsletter for our members and appreciate all of useful feedback from them. We also created a monthly "Flash Info" focusing on the activities of SPC France. Our initiative to promote short-sea shipping awareness and interest led us to organise a series of conferences, meetings and round tables during the year, covering topics such as sea-river shipping, European ecobonus, and SGEIs. We were pleased that those events were attended and reported on by a number of specialized and general interest publications, further boosting public awareness of our constituents.

Our goal is to stimulate inquiries to SPC France as well as to serve as the clearing-house for members' concerns and issues, regarding EU initiatives and programs which affect our members. Maritime and intermodal issues in the EU are obviously at the forefront of the minds of those who contact us, and we fielded many questions regarding EU support for shortsea shipping and intermodality, such as the Motorways of the Seas initiatives, and the Marco Polo program, among others. In order to promote these programs we published several brochures.

In an effort to reach out to our members and to serve them more efficiently, we have continued to enhance our website. With the second-phase ended in 2009, the site gets more and more traffic every month - we had more 317 000 pages views in 2009. By striving to create an attractive, user-friendly website featuring useful and interesting content, we believe we can increase visibility and ability to reach our goals.

In 2009, the French senator, *Henri de Richemont* produced a brand new report on motorways of the seas. SPC France assisted him with contacts in the European Commission and we remained very involved through the promotion and dissemination of the report.

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

- Following our first *European Sea-River Shipping Day*, we continue working on sea-river shipping, by gathering shipowners, ports, infrastructure managers, institutions. During the year, they were able to enjoy several practical benefits as a result.
- Our first *"Rencontres BP2S: Lumière sur le SIEG et l'Ecobonus"*, on the topic of European ecobonus and SGEI, was a great success with more than 120 attendees and excellent press coverage.
- SPC France has featured speakers at numerous industry conferences and meetings throughout the year. Please see the website for details.

Next Steps

However, our current budget sharply constrains what we can do for our members. Even on matters deserving immediate attention, our ability to act for them is restricted. Our industry's participants have a lot at stake here. But without sustainable multi-year funding, SPC France cannot achieve the key goals that its members have mandated: raising recognition of our sector's importance by national and transnational decision-makers in order to serve our members' long-term strategic and economic interests.





SPC Germany



Beside the general idea of strengthening the alternative transport modes, in 2009 the German SPC kept to set the focus on generating multimodal transport solutions via project management for the logistics market. In this case the German Hinterlandverkehr is still a strong activity-driver. Project partner have been, Kraft Foods Europe, Krombacher Brewery and Perlen Paper.



Furthermore SPC Germany enhanced its active part in commissions and organisations to promote the idea of multimodal orientation and the waterway system, e.g. as member of the

- BSK-commission (Bundesfachgruppe Schwertransporte und Kranarbeiten, Federal professional group for heavy load and crane operations)
- Working-group Inland Waterway Systems (Logistics Initiative Hamburg, BWA Hamburg)
- Working-group Green Logistics (Logistics Initiative Mecklenburg-Vorpommern)

The "Bundesdeutsche Arbeitskreis für Umweltbewusstes Management e.V." (German Environmental Management Association), which is European business community's largest environmental initiative, was project partner in case of organising a common event regarding sustainability as a factor of success in logistics.

Together with BSK there has been held a panel-discussion at the "transport logistics 2009" fair in Munich dealing with bottlenecks issues in the heavy load sector.

Another successful event-format, the Multimodal Network Day, again took place in Bonn at the Ministry of Transport in

order to get together the producing and transporting industry to generate modal-shifting business.

An increasing interest for ShortSeaShipping and inland waterborne transport from domestic industries and forwarders persisted also in the elapsed year. In addition membership in the German SPC still stays interesting for companies: Although there has been a slight fluctuation, the number of private members is consistent at a level of 30.

Once again presentations and three lectures have been held at German Universities (combined with excursions) to generate a better understanding of multimodal related questions and to give an insight in the complex waterway system.

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

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



Important Key figures

The annual number of about 60 individual enquiries from shippers and forwarders and the major projects led to an aggregated avoidance of 948.900.000 tkm and to savings of 56.944 t CO₂ on European roads.



SPC Greece



In 2009 the Greek SPC have participated in the following events in order to promote Short Sea Shipping.

- MARCO POLO EUROPEAN INFO DAY - Brussels 4th Feb. 2009
- PROPS MEETING – London 23rd Feb. 2009
- ESN/SPC MEETING – Brussels 7-8th July 2009

It has collaborated in regular meetings with the Greek Ministry Merchant Marine, the Hellenic Chamber of Shipping and the Port Authority of Piraeus in promoting the competitiveness of Greek SSS.

It has provided updated information to its members and the wider public in all shipping matters, national, EU and IMO legislation and has continued to work closely with all the others SPCs for the promotion of SSS in Europe.

Members of the staff of the SPC Greece have been involved in assisting Shipping related research in the three Maritime Universities of Greece, namely the Piraeus University, The National Technical University of Athens and the Aegean University.





SPC Holland



SHORTSEA.NL
PROMOTION CENTRE

In 2009 the focus of the Shortsea Promotion Centre was on money. How will the Centre be financed for the next three years? In spite of a positive evaluation of "Twinstra Gudde", the Ministry of Transport & Waterworks reconfirmed its intention to gradually reduce subsidies as from January 1st 2010, eventually leading to a complete stop in 2013. Discussions with the Ministry divulged that this intention could only be influenced through a political approach. For that reason the three promotion centres for inland waterway shipping, rail and shortsea decided to lobby the members of the Permanent Parliamentary Commission for Transport prior to the discussions on the 2010 budgets in Parliament. For that purpose a brief paper was published called:

"A robust mobility system cannot come into being all by itself" (*An essential role for the Shortsea, Inland Waterways and Rail Promotion Centres*)

Thanks to the lobby efforts of the chairmen of the "Inland Shipping Promotion Centre" and "Rail Cargo Information Netherlands", three political parties submitted an amendment. In this amendment, the plea for maintaining the subsidies at the level of 2009. This proposal was adopted in full by the minister of transport. This implies that at least until 2013 the Shortsea Promotion Centre can continue its work. It is however essential that the financial support of the participants will continue in the years to come. Unfortunately 6 participants had to stop their contribution by the end of 2009 as a consequence of the difficult economic circumstances. On the other hand this loss will be compensated by new participants.

In 2009 we started our networking meetings for operators in the sector. At each session an interesting subject was discussed. These meetings will be organized in Rotterdam four times a year.

This year, the co-operation between the three promotion centres lead to a conference called "Holland Intermodal, added value with more modalities". The positive reactions made us decide to organize a similar conference in 2011 at reasonable fees.



Enquiries

In 2009 the total number of enquiries was 783. Compared with 2008 the number of enquiries rose by 51,7% (267). A large number of the enquiries can be attributed to factsheets, participation in exhibitions where information packs were handed out and the organization of receptions.

Factsheets

6 new or renewed factsheets have been published in 2009; namely the factsheets RoRo and (freight)ferry, Container measures, Russia, Dutch ports and Shortsea, Internet and factsheet Turkey.

In April, the factsheet "Russia" was sent to shippers and transport companies 339 times with the Shortsea Journal "Russia". The factsheet "RoRo and (freight)ferry" in combination with an overview of the RoRo liner services was sent to 790 transport companies and 135 copies were sent to intermediate vocational schools. The Shortsea Journal "RoRo" (2008) was added to 85 factsheet mailings. The Factsheet "Dutch ports and Shortsea" was sent to Dutch terminals 60 times, to financial participants of the promotion centre 110 times, to logistic intermediate vocational schools 135 times and to ports 90 times.

The factsheet "Container measures" and "Internet" were not distributed via a mailing. They are however added to each info pack. The Factsheet Turkey was published in December 2009.

Website

In 2009 an important focal point was the search engine "Brokers". Also the data on Dutch terminals and company profiles of financial participants were brought up to date. Moreover, for each European country, under "destinations liner services", transshipment figures to and from the Netherlands in 2008 were added. On top of that the pages on container types has completely been renewed and extended. Finally the search engine "liner services" was completed with intermodal information of financial participants.

The website was visited well in 2009 with an average of 73 unique visitors per calendar day. Taking into account that during weekends the website is hardly visited, we may assume that the average per working day was even higher. Every month there is a peak around the date that the e-mail newsletter is sent out. On this day and the following days the number of unique visitors is substantially higher. For example 357 unique visitors on April 1st 2009 or 303 unique visitors on October 1st 2009. The highest number of visitors was measured on June 30th after distribution of the June newsletter, namely 440.



SPC Ireland



The Irish Maritime Development Office (IMDO) is a body under the aegis of the Department of Transport. The office is the national agency responsible for supporting the development of the Irish shipping, ports and shipping service sectors. The office continued to play an active role in the pursuit of promotion of Shortsea policy in Ireland.



Overview

The domestic shipping and ports services sector in Ireland was faced with further challenging market and economic conditions in 2009. Operators and ports had to continue to respond quickly to the adverse market conditions and did so through consolidation, changing schedules and frequency. Traffic volumes through Irish ports decreased in 2009 as the Irish economy remained in recession for the year with GDP falling by 7 per cent. Between January 2009 and December 2009 lo/lo operators reduced capacity by 21 per cent, on top of a 16 per cent reduction in 2008. Lo/lo traffic through all Irish ports fell by 22 per cent in 2009. Ro/ro traffic also fell in 2009, a 9 per cent decline, however capacity increased by 10% on Ireland – UK routes due to structural changes on existing routes. Norfolkline replaced its vessel on the Belfast-Heysham route with the larger *Maersk Exporter* and Seatruck Ferries replaced 2 vessels with new larger ships on the Warrenpoint-Heysham route along with adding a new larger vessel to the Dublin – Liverpool route. Stena Line also added the *Stena Nordica* as part of a new schedule from Dublin.

Bulk traffic through Irish ports suffered a significant decline in volumes, down 22 per cent in 2009. Liquid bulk fell 12 per cent, the dry bulk sectors at Irish Ports declined by 29 per cent, and break bulk fell by 49 per cent. The fall off is attributable to the bulk market being exposed to the ongoing dramatic fall off in construction, high commodity prices and a severe lack of demand. External factors such as the economic crisis and deepening recession have had a negative impact on volume demand. Passenger traffic, remained at the same level as in 2008, however during the peak travelling season volumes increased 2 per cent, likely due to a change in passenger travel patterns away from

shorter, frequent breaks back to a longer trip with a car. Some noteworthy highlights for the office during 2008 included:

Market Research & Industry Development

- As part of its statutory remit the office provides expert policy advice on development and co-ordination of shortsea and shipping policy to the Minister and Government officials.
- The IMDO in 2009 published and distributed 12 updated shipping reviews detailing traffic, bilateral trade and business between Ireland and other European countries.
- The office provided strategic support to shortsea companies with the development and establishment of new liner shipping services.
- Over the course of 2009 the office contributed to a number of steering groups on freight transport and ports performance.
- The IMDO published the 6th Annual Irish Maritime Transport Economist and expanded the content along with presenting the data to heads of industry.
- The IMDO co-organized the European Shortsea Congress Conference in Liverpool and held a finance seminar in 2009 bringing together over 100 top executives in Shortsea shipping and top executives in finance, law, tax and shipping. The IMDO as a member of numerous EU committees contributed to the TEN-T programme, EU policy reviews and FP7.
- Provided regular market intelligence and data to industry and government.
- The office launched a new online international advertising campaign to promote the advantage of doing maritime business in Ireland.
- Our E-based strategy showed an increase of 30% of visits to the IMDO web portal.
- All details of information services, and business support are available on www.imdo.ie



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



SPC Italy



SPC Italy activities in the last year have been focused on promoting the Ecobonus, which was coming to its last year of official existence. We kept observing any possible update of the decree, which has not happened so far.



We continued with our general activities:

- Updating of website and database
- Press Release
- Monitoring ports
- Releasing any news concerning the Motorways of the Sea to our Associates
- Updating of the SPC Italian website with any new maritime connection.

Since March 2009 the Italian SPC has been left with one employee only, so we couldn't participate to ESN Meetings or other conferences. We even lost one of our Associates, which led to a further budget reduction.

We continued monitoring the Motorways of the Sea; during 2009 the number of maritime routes kept stable but there was an increase of Ro-Ro traffic (289.260 LiMs moved in the first three months of 2009, compared to the 273.540 LiMs moved in the first three months of 2008), due to improved services and bigger vessels.





ISPC Lithuania



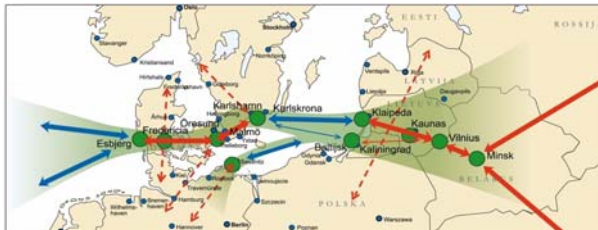
Lithuanian Short Sea Promotion Centre (LSPC) was founded in 2004 and since autumn 2007 lead by Lithuanian Intermodal Transport Technology Platform (LITTP) and it's Lead Partner - Competence Centre of Intermodal Transport and Logistics (CCITL) of Vilnius Gediminas Technical University aiming to be reorganize SPC to IPC (Intermodal Promotion Centre).

1. Development of Lithuanian intermodal transport system.

1.1. Integration of the Lithuanian SSS and intermodal transport system into international East-West transport corridor.

The East – West transport corridor (EWTC) is linking the Southern Baltic Sea Region of the European Union (Denmark, Germany, Lithuania, Sweden), the Kaliningrad Region of the Russian Federation and countries behind (Belarus, Ukraine, Russia, Kazakhstan, Mongolia, China, and other countries in the Black Sea Region and Asia).

CCITL VGTU is a lead Partner for the task, dedicated for establishment and activities of the EWTC Association (EWTCa) in frame of the project EWTC II, which is financed by EU Baltic Sea Programme 2007-2013. Together with LITTP a work was performed and on 16 December 2009 Declaration on establishment of Initiative Group of the EWTCa was signed. In 2010 the work was further expanded.



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

Every month stakeholders of the Lithuanian intermodal transport system had meetings at the LITTP Council, discussing tendencies and events in world and European markets, exchange opinions between authorities, transport business and researchers.

1.3. Development of Public logistic centres and integration of them into Lithuanian SSS and intermodal transport system.

In July 2009 was organized a LITTP forum, analysing bottlenecks in development of public logistic centres – important segment of Lithuanian SSS and intermodal transport system. The main results of the workshop were recommendations to overcome problems.

1.4. Participation in international projects of transport and intermodality.

1.4.1. PROPS - Promotional Platform for Short Sea Shipping and Intermodality. Representatives of Lithuanian SPC/IPC took

active part at RIGA Workshop in June 2009 and VARNA Workshop in October 2009.

1.4.2. B2B LOCO (Baltic to Balkan Network for Logistics Competence) , aiming dissemination of results of EU research projects on transport, logistics and in intermodality between SMEs of transport and logistics. The workshop of B2B LOCO was organised in Vilnius.

2. Promotion of the intermodality.

2.1. The news letter of the EWTCa, the website , database, distribution of documents

Prepared and published a news-letter on development of the EWTC Association.

Extension of the existing website of the CCITL of VGTU (www.ccitl.vgtu.lt) with activities of the SSS and establishment a new website with LITTP activities was performed (www.ccitl-littp.lt).

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

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

Mailing and e-mailing to various target groups on: organisation of round table discussions, LITTP meetings, seminars and workshops on topic of promotion SSS and intermodality, effective intermodal transport network in the Baltic Sea Region (BSR),

2.2. Promoting best practice (Viking shuttle train) from Baltic Sea to Black Sea Klaipeda- Odessa/ Ilyichovsk)

Application for EIA award was prepared by the working group on this intermodal project, as well was prepared and disseminated in various transport workshops, seminars and conferences on the regional and on the European level.

Procter & Gamble and project „Viking“ were announced as the winners of the 9th annual European “Intermodal Award” for best practices competition. The ceremony took place during a Gala reception at the Asia-Europe Transport Development Forum, parallel organised alongside the first Asia-Europe Transport Ministers’ Meeting, gathering numerous transport ministers from EU and Asia states in the Baltic, Vilnius, 19 October 2009.

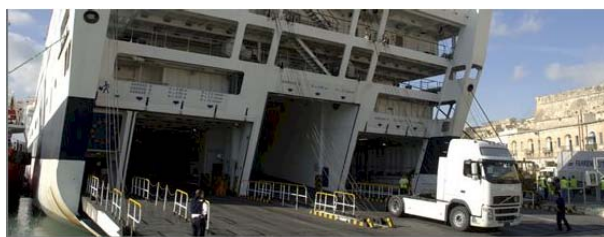




SPC Malta



The Malta Shortsea Promotion Centre (MSPC) is an independent non-profit body where it is financed by memberships. Founded in 2005, the organisation is being managed and administered by an Executive Council which includes a representation of all the members.



During the year under review all efforts were concentrated on the promotion of the Centre's objectives among the local shipping industry. Concentration was on the promotion of shortsea services as well as of the shipping and ports industry initiatives aiming at expanding further maritime transport. The MSPC aimed to 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. To this aim, it is committed in identification and access to opportunities which can be turned into business prospects.

The Centre followed and participated in regional co-operation projects and in seminars and workshops, local and European fora and also in the ESN activities. The experience and information received during the participation in related events are passed on to members. The Centre also sustained in creating awareness of the EU's policy on shortsea shipping and access to EU funds, programmes and opportunities and serves as a catalyst between the needs of local entities involved in logistics and the various programmes offered by the EU.

The website of the Centre continued to prove to be the most popular way of communication with stakeholders as shown by the continuous growth in the number of hits on various sections. The main focus of our web site remains to give detailed and relevant information to the industry users such as to bring news that are relevant to providers, users and policy makers of short sea shipping and to keep Maltese players informed on EU policy issues.

The main challenge of the centre remains to be the creation of more awareness and depiction of the centre, and as such its main aim is to continue to attract new membership. This will provide the Centre better position to enhance its awareness and be a credible and effective centre with relevance to the local transport industry while at the same time integrating the centre into the wider network of Short Sea Shipping.





SPC Norway

SHORTSEA SHIPPING NORWAY

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

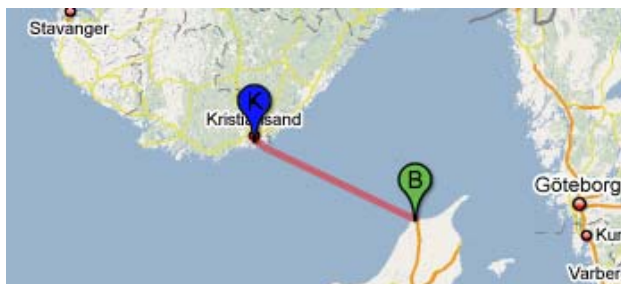
Through the "Maritimt Forum" network, comprising 600 companies and organizations from all areas of the maritime community, we are able to reach a broad audience both nationally and regionally.

EU Policy and ESN

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

A secondary goal is that the special circumstances of Norway are taken into account at European level. SPC Norway therefore has participated actively in the EU Consultation related to short sea shipping. In the first half of 2009 we lead ESN and focus on future financing.

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



Web site

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

In 2009 we had about 30.000 visits to our web site. The most popular services were our new liner search and our news section.

News service

In 2009 we submitted 18 newsletters, which were distributed to about 3.000 persons. The focus our news service is news related to liner services, schedules, ports and EU policies.

Liner schedules

Throughout 2009 we improved our liner schedule search function.

The following information services are provided:

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

The liner schedule look-up has become very popular and by the end of 2009 it generated about 80 page views per day. The most popular pages are the Port-to-Port and Regular Services pages.

Marco Polo

SPC Norway assists the Norwegian Ministry of Transport in its promotion of the Marco Polo program, which Norway contributes to. In 2009 Norway had two successful applications.

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

Projects

SPC Norway was a major contributor to "Shortsea XML", a Marco Polo Common Learning action that was finalized 2007. We are working hard to promote the use of eFreight in Norway.





SPC Poland



The neutral status of the SPC Association as a non-governmental body was maintained in 2009 and we continued to offer our expertise and skills in an effort to effectively phase in the EU Transport Policy 2008-2018 into Poland's strategic programmes.



The new board of the Association was elected by the Annual Shareholders Meeting for the next four years in June 2009 and the approval was given to the proposed ways and means of SPC's activity.

In the course of the year we made several presentations addressed to the stakeholders of maritime industry and participated actively in the various symposiums and conferences.

We continued the identification of bottlenecks in development of SSS in Poland and monitoring of the Motorways of the Sea projects within the Baltic Sea.

Regular updating information of the SPC's web page www.shortsea.pl was constantly being effected.

In cooperation with other partners of the maritime sector, the annual New Year meeting for over 200 participants and the XVth Baltic Herring Meeting with over 2000 guests were organized in 2009.

The support was aimed also at introducing into the TEN-T revision the trimodal Central European Transport Corridor – CETC Route 65 leading from Sweden across Baltic to the south crossing Poland, Czech Republic, Hungary to Croatia.

Promotion of SSS as the alternative of road transport, and of EU transport policy in media was the next task effected by the Association members. Finally, we had again secured financial backing to keep the SPC going for the foreseeable future.





SPC Portugal



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



During the year 2009 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 MOS) dedicated to the Maritime Transport in March in Oporto.
- ❖ Participation as a speaker in several Conferences and Events
- ❖ Participation in Props meeting (London 23rd February)
- ❖ Participation in inaugural course of SURCO (23 to 26th March Gijón- Santander-Gijón)
- ❖ Participation in European Maritime Day in Rome (May)
- ❖ Participation in ESN/Focal Point meeting (Brussels – 7/8 July)

- ❖ Visits to Shippers/Receivers and Freight Forwarders
- ❖ Several visits to DGTREN (Brussels)
- ❖ Articles in specialized newspapers and magazines.
- ❖ Coordination of Portuguese group (50) participants in the 3rd Portuguese Focal Gloss course in the European School of Shortsea Shipping.
- ❖ Coordination of the Shortsea Shipping Working Group within ECASBA (European Community Association of Ship Brokers and Ship Agents).

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



2009 has been marked by the international financial crisis that has deeply impacted on global trade and the subsequent decrease in traffic, particularly in Europe. However, 2009 has remained a challenging year for Short Sea Shipping.

Specifically, the first two motorways of the sea in the South Atlantic corridor, between Spain and France have been awarded in 2009: Atlantica SL, operating the service Vigo-Nantes Saint Nazaire / Le Havre, calling also at Algeciras, and GLD Atlantique, which covers the distance Gijón-Nantes Saint-Nazaire. The governments of Spain and France have signed both agreements with the respective consortia for implementation and financing of these motorways of the sea. This is the final step enabling to launch in 2010 the new maritime services, which are expected to reach 60000 trucks per year each service. SPC has supported both projects from the beginning and, in fact, some of our members are part of the awarded consortia.



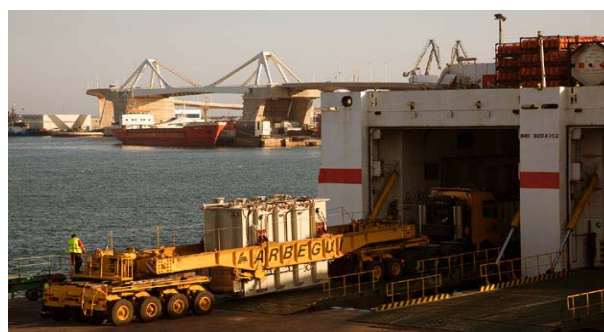
Also during 2009 an intergovernmental commission between Spanish and Italian governments has been created. It will be responsible for the promotion, establishment and operation of one or more motorways of the sea between both countries. SPC Spain, where the public sector, the maritime and port community and the road transport sector are represented, will provide support for the effective development of the motorway of the sea concept in the Mediterranean.

SPC Spain has also been monitoring the port legal reform taking place in Spain, defending a differentiated approach of Short Sea Shipping, aiming to increase its competitiveness. The legal reform was not completed in 2009, and is expected to finalize during 2010.

In terms of consolidation of Short Sea Shipping, and despite the decrease of demand as a result of the economic situation, 2009 was a year with both the initiation of new services and the consolidation of existing ones, many of them operated by members of SPC Spain. Some of these developments can be summarized as follows.

USTICA Lines inaugurated in March a weekly container service between Malaga and Livorno, expanded four months later with a call at the port of Civitavecchia. Brittany Ferries opened a new service between Santander and the British port of Portsmouth. Also in Santander, the German company Mann Lines Germany launched a new ro-ro service with the port of Cuxhaven. WEC Lines began a new regular container service between Gijón, the United Kingdom and the Netherlands. Team Lines extended its regular service from Bilbao to the ports of Hamburg, Gdansk and Gdynia. Transfennica increased the frequency in the line Bilbao-Zeebrugge from 3 to 5 sailings per week. UECC extended its offer to unaccompanied trailers in its car-carrier service connecting Santander and Zeebrugge.

During 2009, SPC Spain has continued to support the development of Short Sea Shipping through various activities. Among the promotion actions, SPC Spain has been present in several conferences and seminars, defending the advantages of short sea and addressing the concerns of stakeholders, individuals and companies interested in this mode of transport. In relation to training activities, SPC Spain has consolidated its presence in the European School of Short Sea Shipping (Escola) in Barcelona, that has been giving for more than 3 years practical workshops on board of ro-ro ships covering services between Spain and Italy. In 2009, SPC has also joined the Escola in a workshop with focused in the development of rail and maritime intermodality hosted on board a train. SPC has been also collaborating during 2009 in various R+D+I projects dealing with the development of e-platforms to facilitate the process of contract of short sea services and, in general, the interaction between agents involved in the short sea sector. Finally, SPC Spain has continued to actively participate in the meetings with the European Commission and the Spanish government, sharing information on the development of Short Sea Shipping.





SPC Sweden



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

The object of Maritime Forum is to:

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

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

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

2009

Shortsea Promotion Centre Sweden chaired the European Shortsea Network during the autumn of 2009 and was, as part of the chairmen troika of coming, acting and leaving chairman, deeply involved in the ESN overall activities during spring. SPC Sweden organized an ESN meeting in Stockholm in December, where 13 SPCs were present. On the agenda was the SPC-financial situation, the ESN joint activities and the ESN-cooperation.

The delegates also got a résumé of shipping and transportation issues during the Swedish EU presidency from the Swedish Ministry of Enterprise and a speech covering the EU-project "Dryports – a modal shift in

practice". A dinner – with a Christmas smorgasbord – was held onboard an old Swedish archipelago-ferry.

Maritime Forum has during 2009 had a special focus on an open strategy-process for the entire Swedish maritime cluster. The aim of the process has been to create the basis for a Swedish maritime policy and to stimulate more cooperation and common actions between the maritime companies and organizations. One of the working-groups within this process has covered short-sea shipping and inland shipping.

Maritime Forum also organised a number of conferences and seminars highlighting the shipping sector and its challenges, among others The World Maritime Day Conference, "Stora Marindagen" about shipping, technical innovations and sustainable transportation solutions and seminars during the so called Almedalen Summer Week for politicians and decision-makers on the island of Gotland. With the assistance of SPC Holland, the Forum also arranged a trip for politicians and shipping executives studying inland shipping. The trip included visits to the Port of Antwerp, the Port of Rotterdam and meetings with representatives from the EU Commission and different inland waterway organizations.

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





SPC Turkey



In 2010, the *White Paper* was published. In this Paper, an emphasis was made on the usage of the Short Sea Shipping as a more economic alternative than the other modes of transport, and this mode of transport was favored.



In the "Wider Europe for Transport - High Level Working Group" meeting held under the auspices of the Ministry of Transport, a number of proposals were brought on the agenda concerning the extension of the routes to Turkey, and decisions were made regarding the suggestion of İzmir, Mersin, İstanbul and Samsun ports so as to enable the connection of these eligible routes with the sea and involve in the "Motorways of the Sea" concept developed by the EU in the framework of the project concerned.

Ro-Ro transportation, one of the most important and functional mode of intermodal transportation, provides new export routes for our international goods transportation by road with the advantage of the geographical location of our country. Among the projects offered, those of Mersin and Samsun have been accepted.

Currently we provide ro-ro transportation services in the Bandırma-Ambarlı and Ambarlı-Bandırma line. We carried over 500,000 tons on these lines in 2007. Ro-ro transportation is widely used in transports from Rize, Trabzon, Samsun and Zonguldak to Ukraine, Russia and Georgia in the Black Sea Region, from İzmir, Çeşme, Dikili and Çanakkale in the Aegean region to Greece and Italy, from Mersin in the Mediterranean Region to Northern Cyprus, as well as in the Sea of Marmara.

Turkey have provided truck and passenger transportation services between Russian and Turkish ports, and Ukrainian and Turkish ports for 15 years. UND PROJECTS, Ro-Ro Lines > Tekirdağ – Toulon & Tekirdağ - Trieste. AKPORT TEKIRDAG PORT, Akport Tekirdağ Port is a model port complex with its up-to-date equipment and experienced staff, with a total area of 130.000 sqm. , dock length of 2.000 m , and with an annual capacity 3.000.000 tonness bulk cargo and 250.000 containers.





SPC United Kingdom



Freight by Water (formerly Sea & Water) was established in response to the Royal Commission's 1994 report on environmental pollution which found that moving freight by water was more environmentally sustainable than other modes of transport.

The 1998 Transport White Paper A New Deal for Transport, which called for better use of the UK's inland and coastal waterways, gave rise to a subsequent paper in 2000 entitled Waterways for Tomorrow. This paper called for a study to examine potential opportunities for increasing the amount of waterborne freight in the UK.



In 2000, the Department for Environment, Transport and the Regions, commissioned such a study and a final report, Freight on Water, was published in 2002. This report revealed that the water-freight industry was hampered by a lack of cohesive representation and recommended that a strong representative body for the industry be established.

By the end of 2002, Government merged both initiatives to create a single representative body responsible for coordinating and promoting the movement of freight by short-sea, coastal and inland shipping.

As a result, Sea and Water was formally established in 2003, and renamed Freight by Water in 2008.

As the UK's designated agent for change, Freight by Water intends to deliver significant modal shift in 2010 and beyond. This will be achieved by Freight by Water fulfilling its role as facilitator - organising targeted seminars and collaborative meetings aimed at the end users and 3pls to identify, promote and stimulate demand for water freight, to remove barriers and push for action.

As an independent industry body, Freight by Water has a key role to facilitate change by bringing together all the key stakeholders – government and local authorities, ship and barge operators, port and terminal operators, importers and exporters, logistics service providers - to drive forward sustainable solutions.





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European Shortsea Network

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