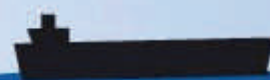






Annual Report 2007

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 text at the bottom.

European Shortsea Network
www.shortsea.info





-  = Member of the European Shortsea Network (ESN)
-  = future ESN member

Foreword



Since the publication of the last Annual Report of the European Shortsea Network (ESN), two new Shortsea Promotion Centres (SPC) have joined the very "selective" cluster of people and organisations promoting short sea shipping and intermodality in Europe.

We are very pleased to welcome Bulgaria and Lithuania as new members of the ESN in 2007.

By increasing the number of members, -we are now 20 SPCs in Europe-, the ESN can actually benefit even more from the "Vishnu-Shiva Effect", i.e. more arms, strengths and possibilities to fight against the "road-only" attitude, in the struggle to gain the hearts and minds of European shippers and truckers.

In December 2007, an important ESN meeting took place in Lisbon in connection with a DG-TREN/"Focal Points" meeting and a Marco Polo II Conference co-organised by SPC Portugal. It shows how effective the links between the SPC's and Europe can be, and how the ESN and the European Commission can work together, in good understanding and coordination.

However, even though the work performed by all the SPC is really impressive, the lack of means and financial resources is still very critical, throwing spanners in the works. Indeed, the extension of the scope of SPC to intermodality is presently slowed down by this long-lasting and disturbing scarcity of means and resources.

As chairman of the ESN, we fully trust in the "power" of information dissemination and networking. We also would like to stress that even when every SPC carries on its own activities, the whole network is involved in common actions and projects at the European level, such as "Shortsea XML" or "2E3S" -the European School of Short Sea Shipping.

We would like to thank all our members, colleagues and partners, individuals and organisations promoting shortsea shipping and intermodality, for their valuable support and commitment all along the year.

2007 has seen the emergence of a new concept with "the European Maritime Transport Space without barriers" and a new approach with the "EU Freight Transport Logistics Action Plan". Let's bring them to reality in 2008 !

In 2008, like in 2007 and in the previous years, the ESN will continue to work actively promoting shortsea shipping and intermodality, aiming at a Green "European Transport Space without barriers" for a genuine and effective sustainable mobility in Europe.

SPC France
Jean-Marie Millour
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 neutral, non commercial intermediate party, 100% financed by the Flemish Region. Companies are consulting us for a wide spectrum of questions and problems : from sailing opportunities to technical issues. Due to our own extensive network and the expertise available in the European Shortsea Network, a large percentage of the questions can be answered. Companies with questions about their transport are brought in contact with possible partners.

The sustainable use of shortsea shipping by shippers, forwarders and logistic companies is illustrated by the growing shortsea shipping figures in ports and on the canals. In 2007 about 129,3 million tons of various shortsea cargo was handled in the 4 Flemish ports. This represents a growth of 7.3% compared to 2006. The sss- tonnage has increased by 46% since 1999, the first year the promotion centre gathered complete shortsea statistics in Flanders. Again more than 50% of the total cargo handled in the 4 ports is shortsea cargo. Also the sea-river traffic grew again but only on the canal Brussels-Scheldt. The Albertcanal suffered from decreasing tonnages, still as result of infrastructural bottlenecks hampering the development of the sea-river traffic (limitation in air draft under the bridges).

Within ESN bilateral and multilateral actions are organised. Together with the Finnish colleagues a workshop was organised in Helsinki and Kotka, focusing on the shortsea traffic between Finland and the Flemish ports and with specific attention for the transit to Russia. For the third time we had an informal round table with members of the Transport Committee of the European Parliament, exchanging views on the development of shortsea shipping, subsidy programs...

For the second time an international Shortsea conference took place in Bruges. Our promotion centre explained the role of the Network and made a presentation on how the market is approached.

By means of best practices the potential user of SSS is informed in a very practical and clear way why shortsea shipping is a sustainable part of a transport chain. These best practices are exchanged between the members of ESN and can also be used to solve certain bottlenecks in other countries.

The promotion centre had together with Promotion Inland Navigation a stand on the 3 days' international trade fair 'Transport and Logistics' in Antwerp, promoting the possible synergy between the two modes and their role in the transport chain.

The promotion centre often joins missions and port days of the Flemish ports. The Flemish prime minister announced in 2007 the "Flanders Port Area" concept, stressing the strengths of the four ports in the global promotion campaigns, a vision shared by the promotion centre. We also use the visits of logistic and/or economic delegations out of European countries to give a presentation on SSS. In 2007 we had a Latvian group visiting the Flemish ports.

An initiative of the Flemish and Dutch government resulted in an extensive Northsea Taskforce for Motorways of the Sea. A call for proposals was launched: out of the received ones, projects will be submitted to the European Commission at the occasion of the official call in 2008.

In 2007 the new businessplan (2007-2010) was issued and approved. There are three basic elements supporting the plan: the fieldwork (contacting and visiting potential and existing users of SSS), the bottlenecks follow up (including policy preparing actions) and extending the networking. Especially the fieldwork is being enforced by a very active communication: newsletters, e-news, press moments, publications, presentations... with the accent on practical information i.e. best practices.

As follow up of previously organised workshops the promotion centre also concentrates on document flow, conditions for a specific shortsea terminal in the port(s), flexibility of labour, pilot tariffs, ...



SPC Bulgaria



Intermodal & Shortsea Promotion Centre

SPC Bulgaria is established in the end of 2004, - this is the first SPC in Black Sea region.

SPC Bulgaria is non governmental, non profit, independent and neutral organization.

Starting 01.01.2007 Bulgaria is full member of European Union. During the Annual Meeting in May 2007 of European Shortsea Network in Bonn SPC Bulgaria became a member of ESN.

SPC Bulgaria is forming it's policy and activity according recommendations and decisions of European Commission,- such as White paper "European transport policy", Programme for development of SSS, and first of all guidelines/projects for extending the activities of SPCs toward intermodal promotion.

In 2007 SPC Bulgaria made a decision to enlarge it's activity into intermodal promotion, in accordance with European co modality concept, grow into Intermodal & Shortsea Promotion Centre.

Activities of SPC Bulgaria for 2007 were directed to the national, regional and European level.

In National level: SPC Bulgaria is working together with MoT - State agency Railway Administration in Consulting Board for Combined Transport, which main goal is creating a Programme of development of combined / intermodal transport in Bulgaria. SPC Bulgaria take part also in Consulting Board for Freight-oriented Rail transport network. With Maritime Administration SPC Bulgaria is working for establishment of Business Working Group/Board for Black Sea Motorways of the Sea and for improving Maritime safety and SAR operation in Black Sea.

SPC Bulgaria makes a consultings and encourages some main Bulgarian transport companies for participation in the Programme Marco Polo II. One of companies which was consulted, was approved and now is included in short list of approved projects. Together with main Bulgarian shippers SPC Bulgaria is working for new freight transport schemes and "Green" logistics.

In Regional level: SPC Bulgaria pay attention to two areas : Black Sea region – with accent SSS and Maritime logistics promotion, and Balkans region with accent Rail freight transport logistics / Intermodal logistics promotion.

In Black Sea region SPC Bulgaria contribute to few European/TRACECA Program projects:

Improvement of maritime links between TRACECA and TENS corridors and Motorways of the Sea for the Black Sea projects, and also International Logistical Centers & Western NIS countries project.

SPC Bulgaria made it's contribution to reestablishment and development of Bulgarian – Russian maritime links and establishment of new ferryboat line- part of intermodal corridor RU-BG-GR.

In Balkans region SPC Bulgaria actively promoted of Rail freight transport logistics/co modality concept. SPC Bulgaria organized a second Balkans Intermodal and Logistics Conference in Sofia. More than 180 decision makers and executives took part in the work of the Conference. During the BIL Conference a meeting of SERG Freight Transport Working Group was held. PROMIT Workshop 2007 "Promotion measures on intermodal transport and their impact" found it's place in the Conference programme too.

An important event promoting European Intermodal transport was a Ceremony of EIA Award 2007 for best intermodal practices which was held during the BIL Conference too.

In European level: SPC Bulgaria participate in consultations about European freight transport logistics action plan and transfer to it's members all documents about European measures to support freight transport for information and implementation.

SPC Bulgaria is working together with other SPCs for promoting and realized of common SSS activities and projects. For implementation of our mission and activities SPC Bulgaria makes good relations with DG TREN, SPCs and other professional organizations such as EIA, ECSA, CER, UIRR, e t c .



SPC Croatia

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



Consequently, we have focused on project management and visited several conferences and seminars about EU funds (Marco Polo II, IPA, INTERREG), which has resulted in positively evaluated INTERREG III project the objective of which is to make a general plan for SSS development in Croatia and a web based liner database.

As a result, most of the activities of SPC Croatia have been focused on improvement of efficacy of the abovementioned lines. In other words, SPC Croatia has been a kind of link between shipowners, ports and the Ministry of Sea making effort to find ways to reduce the line costs as well as to increase their efficacy.

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

In addition to the abovementioned activities, we have noticed that SSS in Croatia could be further developed by means of R&D projects, which can be funded from preaccess EU funds, as Croatia is currently negotiating access to EU, thus being qualified to use certain EU funds.



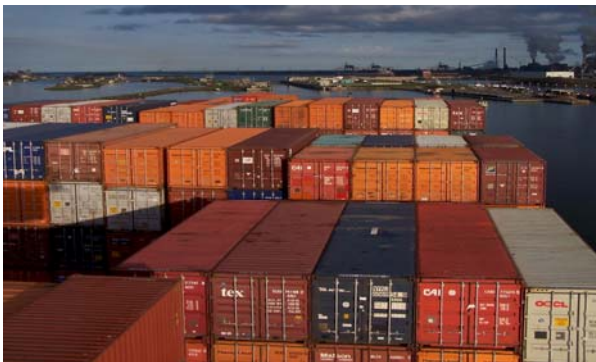


SPC Cyprus



Two years after SPC Cyprus establishment continues with the initiative of the Cyprus Ports Authority (CPA) 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 (CSPC), its objectives and potentials.



During the year under review all efforts were concentrated on the development of the Centre's operations and on the promotion of its objectives among the local shipping industry. CSPC is also closely cooperating with the CPA in relation to the promotion of the Motorways of the Sea in the East Mediterranean, and in this respect the Cyprus SPC was involved with the Euro Mediterranean Project Call for Pilot projects meetings with the MEDA MoS representatives and the local shipping lines and ship owners in an effort to bring together interested parties for the formation of a relevant project.

Moreover, CSPC was also involved in meetings held for the promotion of the project East Mediterranean Motorways of the Sea Master Plan. Through the active participation of CPA in this project, the aim of the CSPC is to promote the objectives and tasks of this project to the local maritime industry as well as to act as a liaison between the local shipping lines and ship owners with

shipping lines and ship owners that are based in the countries that participate in the project.

Meantime, several promotional activities were held for the promotion of the Cyprus ports industry and the port infrastructure development programme that is in place. This programme among others includes the dredging of Limassol sea port area to 16 metres, the extension of the west quay wall to 500 metres, the construction of container stacking areas, the installation of two post panamax gantry cranes and the purchase of new tug boat of 60t bollard pull. This development programme aims in the further development of Limassol port as a regional transshipment hub, a task which is also one of our main objectives.

The CSPC's website has been formed and updates are currently in progress which will allow the Centre to promote itself in a more coherent and systematic way.

SPC Cyprus will continue to work closely with its members and other stakeholders in order to act as the focal point for promoting and improving short sea shipping links in Cyprus and to enhance 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), which joint office management with The Association for Promotion of Danish Shipping, The Danish Society for Naval Architecture and Marine Engineering and the Danish Society of Transport Economics (TØF)

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.

MDCE was involved in several maritime conferences, seminars & arrangements in Denmark in 2007



In May the conference "India as the next country for building ships" took place in Copenhagen arranged by MDCE in cooperation with the Danish Export Association

In June an LNG conference was arranged in Middelfart by MDCE in cooperation with Offshore Center Denmark.

In August a conference in Nyborg "Maritime Safety, Environment and Health 2007" was arranged by the Danish Maritime Occupational Health Service, Danish Maritime Authority and MDCE

In 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) and Copenhagen Business School in Copenhagen.



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

A network "Marco Polo" was arranged in 2007 with many meetings. This network had a representative from the Ministry of Transport as chairman.

Denmark will also participate in the European Shortsea Promotion Networks meetings, together with The Danish Maritime Authority and Ministry of Transport.

Together with the Department of Maritime Research and Innovation (MFI). Shortsea Promotion Denmark is further monitoring the research in Shortsea Shipping and Intermodality





SPC Finland

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. In 2007, SPC Finland accomplished a study on extending the activities into intermodal promotion. Current and possible new members and stakeholders were interviewed on their views on intermodal promotion in Finland. A new work plan for the years 2008 – 2010 was compiled based on the results of the study.

Channel of influence

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. In 2007, SPC Finland responded to the Commission consultations on Motorways of the Sea and on the initiative on the Common European Maritime Space without barriers.

Ship owner barometer

SPC Finland publishes the barometer twice a year, in May and November. 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 publication of the barometer gained a wide publicity on the Finnish media. The barometer is published in Finnish and Swedish.

Information dissemination and events

SPC Finland informs on the main business developments and on national and EU legislation and plans concerning shortsea shipping mainly via the website www.shortsea.fi and via the e-mail newsletters.

In 2007, SPC Finland and SPC Belgium arranged jointly an international workshop "Baltic Sea - a Choice for Russian Transportation" on June 5-6, 2007. In the workshop, topical issues regarding Russian transportation and shortsea shipping between Finland and Belgium were considered, as well as development of inland waterways in Belgium. In total 68 persons participated to the workshop in Helsinki and Kotka.

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. The scope of the work was widened in 2007, as SPC Finland joined the group of Focal Points for Freight Transport Logistics. SPC Finland reported prioritized bottleneck cases to the Commission bottleneck exercises in shortsea shipping and logistics. The bottlenecks reported are in the fields of customs, regulations concerning ship-generated waste and rail-ferry capacity. In 2007, a workshop was arranged in March in Helsinki on maritime environmental regulations and their applications.



Maritime environmental issues

SPC Finland participates to the challenge of saving the Baltic Sea proposed by the cities of Turku and Helsinki. SPC Finland's action plan contains information dissemination on the Baltic Sea especially at the website www.shortsea.fi. The specific characteristics of the Baltic Sea are taken into account also in the work to identify and solve bottlenecks in shortsea shipping. As a part of University of Turku Centre for Maritime Studies, SPC Finland participates also in thematic year for the Bothnian Sea.

Co-operation with the European Shortsea Network

SPC Finland participates actively to the work of the European Shortsea Network, being also a partner in joint projects of the ESN. In 2007, SPC Finland participated to the Marco Polo project Shortsea XML. The task included promotion of the project in Finland with the means of newsletters and a seminar arranged in Helsinki in October 2007.



SPC France



SPC France 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 and intermodality : ports, shipping agents, ship-owners, ship operators, freight forwarders, road transport, shippers associations, inland navigation, etc. as well as coastal regions and the French Ministry of Transport.

The promotion of shortsea shipping and intermodality in France as a sustainable logistic alternative is mainly based on the cooperation of the different modes of transport. Our main purpose is to encourage a traffic shift from the congested road network to environmentally-friendly and sustainable modes such as shortsea, coastal and sea-river shipping, and inland waterways.

Organisation in 2007

Further to the new phase of development launched in 2006, SPC France -with a ship-owner as President and a freight forwarder as vice-President- has carried on with the three-year action plan 2006-2008.

Action at national level

We have gone on with our weekly e-newsletter directed to our members and have again received a very good feedback from them.

- A series of presentations of national and European initiative to enhance short sea shipping and intermodality was delivered through conferences, meetings, and round tables.
- Workshops focussing on the potential synergy between land transport and shortsea shipping were also organised in relation with Motorways of the sea.
- A number of these different actions, as well as several press releases published by SPC France, were widely echoed in magazines and newspapers.

The consequence of these various actions was an increase of inquiries and requests to SPC France as well as specific questions targeting France-Spain Motorways of the Seas initiative, Marco Polo II

programme and European consultations on "European Maritime Transport Space without Barriers".

Participation in ESN network

SPC France has been active in contributing developing and enhancing co-operation between the SPCs, with participation in all ESN meetings and in 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

All along the year, SPC France has been involved in common projects, especially :

- "Shortsea XML", and
- "European School of Short Sea Shipping", SPC France organising informative meetings and participating in sessions for students,

Support to EU shortsea and intermodal initiatives

SPC France regularly disseminated DG TREN information and supported UE initiatives related to shortsea shipping and logistics, co-modality and intermodality.

Contribution to simplification of transport chains

Since the end of 2006, a SPC France working group bringing together ports, ship-owners & ship operators, freight forwarders, shipping agents, shippers and road transport' associations, underwriters & insurance brokers, and many others including Customs authorities & Ministry of Ports & Transport, has met on a very regular basis for working on the simplification of administrative compliance, the liability and the "single transport document". Further to these long lasting and in-depth investigations, SPC France has produced a proposal for a single European transport document -with a single European liability regime over the entire multimodal logistics chains- which has been presented to the French Ministry of Transport and to DG TREN.

This proposal, supported by ESN, is now hopefully to be taken into account by the Commission and its Logistics Action Plan for possibly making a legislative proposal as soon as in 2008.



SPC Germany



In 2007 the German SPC dealt with various tasks amongst others it chaired the European Shortsea Network in the first half of 2007 and organised the common meeting in Bonn.

Furthermore it enhanced its marketing activities for the "Inland Waterway System" on behalf of the German cooperation "Initiative Binnenschifffahrt und Logistik" (Initiative for inland shipping and logistics), i.e. it organised an event "Schwergut im Fluss", which focussed on heavy lift cargo and was attended by manufacturers of heavy lift cargoes and inland ports as well as inland navigation companies.

An increasing interest for ShortSeaShipping and inland waterborne transport from domestic industries and forwarders persisted also in the elapsed year. In addition membership in the German SPC becomes ever more interesting for enterprises hence the number of private members increased to 29 and with Kali-Transport GmbH the first industrial company joined this circle.



Important Key figures

The annual number of about 163 individual inquiries from shippers and forwarders and major projects led to an avoidance of 254.000.000 tkm in 2007 on European roads, this means that the German SPC once again helped to avoid last year almost as many tkm as in the past six years.

Dissemination

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

- SPC Germany undertook a major enhancement of its Homepage, which now offers more in-depth information on inter- and multimodal logistics and on its multimodal projects.
- The 8-page leaflet which used to describe the opportunities of the two wet modes of transport, inland navigation and shortsea shipping and the work of the SPC had been complemented with rail topics to reach an even more multimodal approach and has been spread during personal meetings, presentations or via Internet channels.
- Once again various presentations during meetings of the German chambers of Industry and Commerce and regional groups of the German Logistics Association (BVL) have been held.
- Additionally different presentations and workshops have been held at German Universities with logistics background.
- The SPC had like during previous editions its own booth on the fair "transport logistic 2007" in Munich which was with 231 personal contacts a huge success.
- Finally heads of logistics from various German businesses with different product-portfolios had been addressed. After initial workshops six major projects had been acquired and completed, for example the creation of logistics schemes for a German manufacturer of construction materials or an European major logistics provider.

These activities will continue in 2008, as not all decisions for modal-shifts based on the SPC-project-findings and inquiries have already been done yet by its partners or inquirers. SPC Germany therefore expects this year a further increase in all its key figures especially in tkm.



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, now being in the process of transforming and thus renamed as Short Sea Shipping Shipowners Union. Our members are exclusively short sea operators. Our Center is supported by the Greek Ministry of Merchant Marine and the Union of Greek Shipowners.



Our main efforts during 2007 were to resolve problems in connection with the smooth operation of the Port of Piraeus (and other Greek ports) and to overcome certain bottlenecks which hamper the operation of short sea vessels.

In this respect, regular consultations and face to face meeting with the Port of Piraeus Authorities and the Ministry took place trying to:

- Avoid extensively high dues for the reception facilities of garbage and slops
- Make the Port of Piraeus attractive for SSS vessels, not only for loading / unloading cargoes but also for changing crews, making supplies, performing small range repairs and other relevant shipping activities.

Regular consultations and face to face meetings were also held with the Ministry of Merchant Marine trying:

- To promote the competitiveness of the Short Sea Shipping and

- To extend SSS vessels of certain size and qualifications from the obligatory towage and pilotage.

The Center provided regular and updated information to its Members in Shipping matters included in :

- National legislation,
- EU legislation
- IMO legislation

An open one Day Event has been organized by our Center under the auspices of the Merchant Marine Ministry to our target groups mainly shipowners, shippers and Port operators, concerning the promotion of MOS and their interaction with the Marco Polo Community Programme.

We also followed and participated in all ESN and relevant Communities meeting and activities. In this respect we briefed our MPs in the European Parliament members of the Transport Committee about the progress of SSS initiative.

Finally, our main target still remains that, despite all activities exclusively planned and performed for liner intermodal shipping, Bulk shortsea shipping has to play a key role in the promotion of European SSS (recent European Commission statistics focused and underlined the importance of bulk and namely liquid bulk cargoes for European economy) and more specifically in the South East Motorway of the Sea.





SPC Holland



10 years shortsea promotion in the Netherlands

The shortsea centre started its activities 1 June 1997, initially for three years, but because its success this period has been extended several times and now runs till end of 2009. However, we could have never been successful without the support of the shortsea sector (in the widest sense) itself and of course without their financial support. The 10th anniversary has been celebrated with a small seminar on the future of shortsea, called "A plunge into the future". Minister of state, Mrs Tineke Huizinga, opened the seminar. Four speakers, three from different shortsea sectors and one from the Erasmus University, gave their views on shortsea transport in Europe 10 years from now.

Finances

At the end of 2006 the Dutch Ministry of Transport agreed to extend their part of the financing of our activities till the end of 2009. The centre also increased the presence of the shortsea sector by welcoming 3 new members: Stena Line, Unit45 en ABN AMRO Bank NV.

The past year the number of enquiries declined till the level of 2005. However, the number of visitors to the freight enquiry system has increased. In 2008 we will investigate how we can improve the use of the search engine and freight enquiry system.

New users shortsea transport

The total number of ton/km saved due to SPCs information cannot be calculated; a.o. because companies can find the information for shortsea services and contacts on the website.

The known savings of below routes is at least 10,5 miljard ton/km.

Internet www.shortsea.nl

In March 2007 a new statistics programme has been linked to the website. Before only the visitors to the homepage of the website were counted, but not the visitors that entered the site through other pages. At present all visitors are counted, irrespective of the page that is visited. In 2007 the average number of unique visitors per calendar day is 86 and per working day is the number 110.

Cooperation

The cooperation between our bureau and the promotion centres for rail (Rail Cargo information Netherlands) and inland shipping (Inland Shipping Information Agency) has been stepped up in 2007. The three centres produced a document in which the paths to increased cooperation was laid down. The document is a discussion paper and will act as a guide for the years 2007 till 2010. The cooperation was also discussed at a meeting of the three chairmen and directors of the bureau's.

In 2007 the first "tri-modal" visit was organised in Amsterdam, a combination of visits to terminals and presentations. The formula was a success and will be repeated in 2008. Together with Rail cargo a gathering was organised between shortsea and rail operators ("Shortsea meets rail") in order to create more awareness and enhance cooperation between these modes. At Intermodal 2008, Rail cargo and Shortsea had a joint stand. All three centres took part in the World Port Days 2007 in Rotterdam.



Intermodality

In 2007 the EU Project CIPROC (Co-operative Intermodal Promotion Centres) to extend the activities of shortsea centres to intermodal transport started and SPC Holland took part in the first part. End 2007 the second phase started in which the three centres will jointly organise activities to promote intermodal transport.



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 2007, 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 put in another overall strong performance despite the more challenging market conditions. As a small open Island economy, Ireland is heavily dependent on its short sea maritime services to connect it to the global market place. Traffic volumes through Irish ports continued to increase in 2007 albeit at a slower pace. Irish companies involved in international trade were faced with the ongoing challenges of surging fuel prices and the increasing strength of the Euro, both of which reached record levels in 2007. Despite this, in 2007, there was a 9 per cent increase in lolo capacity. Eucon set up a new route between Dublin and Dunkirk and Europe Lines added a vessel to their weekly Drogheda Rotterdam service. Roro traffic also grew in 2007, with 3 per cent capacity added to the Ireland – UK routes. P&O added an extra vessel to the Dublin – Liverpool route and Sea Truck ferries extended their operations by taking over Celtic Links Dublin – Liverpool service.

The IMDO estimate that in 2007 the Irish maritime supply chain transported goods in excess of €135 billion of merchandise trade which is equivalent to 75 per cent of GDP at current market prices. The ports and short sea shipping operators continued to experience strong unitized freight growth although just below the 10 year trend level. Dublin, Cork, Waterford and Belfast all grew unitized volumes in 2008. Both the wet & dry bulk sectors at Irish Ports declined by 1 per cent, which may be attributable to some segments of the bulk market being more exposed to the slowdown in the domestic housing market. External factors such as increasing raw materials, food and oil prices have all had a negative impact on volume demand. Passenger traffic increased for the first time in 4 years growing by 3 per cent in 2007.

Other noteworthy highlights during 2007 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 2007 published and distributed to over 200 contacts 8 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 2007 the office contributed to a number of steering groups on freight transport and ports performance.
- The IMDO published the 5th Annual Irish Maritime Transport Economist in April.
- The IMDO as a member of numerous EU committees contributed to the 7th framework programme call text, and contributed to the WTP route map and research conference.
- 3 successful FP7 in first R&D call with 6 Irish participants – total funding €7.6 million, Irish share 10.5%
- Organized and hosted a Shortsea conference, Coastlink 2007 from which the “Dublin Declaration”; submitted to DG TREN.
- Provided regular market intelligence and data to industry and government
- The office supported two major overseas marketing initiatives by Irish companies and shipping services providers.
- In 2007 the IMDO completed a strategic review of Irish Maritime Transport policy and submitted to the Department of Transport.
- Our E-based strategy showed an increase in excess of 70 per cent in visits to IMDO web portal.
- The IMDO launched the “Follow the Fleet” web portal in September in schools raising awareness of the Irish shipping sector.
- 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@marine.ie or visit our website www.imdo.ie



SPC Italy



Actions Performed at National Level

Promotion activity of the SPC image

Production of the Newsletter 2007/2008 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"; Advertising about Ecobonus by booklets and informations to customers.



Meetings and Conferences

- **TRANSPOTEC 2007**

International Trade Show on Technology applied to Road transports, Intermodal Services and Logistics. Stand SPC Italy with a part dedicated to the ESN.

- **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

Actions performed at European Level



ESN (European Shortsea Network)

Meeting with SPCs/FoP/EU

- Bonn May 2007

International Activity

- Publication of Italian Newsletter concerning XML Project between the associated
- Interview to the Italian ShortSea President Gianpaolo Polichetti by log-profile consultants leading a survey about the introduction of new Motorways of the Sea lines
- Transpotec 2007 Stand representing ESN at the at the Trade Fair





ISPC Lithuania



Lithuanian Short Sea Promotion Center was founded in 2004.

Executive duties of SPC were overtaken by Marketing department of Klaipeda State Seaport Authority. Seaport Authority represented the Lithuanian SPC in different conferences, exhibitions, seminars, as well as held relations with media. Website of Klaipeda Seaport Authority has a separate intranet page for short sea shipping.

But limitations of the SPC with maritime –related activities does not satisfy demand of the Lithuanian Transport sector as a multimodal system, which includes different transport modes and different stakeholders from transport and logistics.

Keeping this in the mind the establishment (on March 2007) of the Lithuanian Intermodal Transport Technology Platform (LITTP) on the basis of signed co-operation agreement among Lithuanian transport business, research and administrative institutions on development of intermodality marked significant threshold opening new opportunities for promotion of intermodality in Lithuania.

The key transport business structures of Lithuania, such as Lithuanian National Freight Forwarders Association LINEKA, Association of Lithuanian Stevedoring Companies, JSC Lithuanian Railways, Lithuanian National Road Carriers Association LINAVA and other organisation, joined the Platform. The academical sector is represented by researchers from Vilnius Gediminas Technical University(VGTU), Kaunas Technological University (KTU), Klaipeda University (KU) and the Center of Strategic Studies (CSS).

The fact that Platform is presented by the public sector as well as is very important. The MOTC Lithuania as well as Kaunas, Siauliai and Panevezys Municipalities are also among the partners of LITTP.

Competence Centre of Intermodal Transport and Logistics (CCITL) of Vilnius Gediminas Technical University as a neutral body of knowledge on intermodal transport became as a Lead Partner of LITTP.

Lithuanian Ministry of Transport and Communications, DG TREN and European Short Sea Network agreed that LITTP/CCITL since autumn 2007 have overtaken functions of Lithuanian SPC aiming to be reorganized from SPC to IPC (Intermodal Promotion Center).

The main tasks of a newly established LITTP/CCITL are:

- to prepare Lithuanian intermodal transport strategy and present it to the governmental institutions for approval;
- to support co-operation among the interested actors of transport sector (transport , logistics companies, municipalities, governmental and research institutions);
- to adopt information on intermodal transport and logistics technologies development trends as well as innovation and best practises in the EU countries;
- to support efforts of the cities and the regional administrations in development intermodal transport , intermodal logistics centres (freight villages) and in development their network in Lithuania;
- to take part in the establishment of the effective common intermodal transport communication network in the Baltic Sea Region.

In addition, as the results of the investigations carried out in the year 2007 under CIPROC project initiated by European Commission (124 intermodal transport centres and other structures were interviewed) CCITL/LITTP was chosen for demonstration for promotion intermodal transport. We hope that CCITL/LITTP as a new structure (established in 2007) will effectively act in promotion closer relations between shipping lines, the seaport, railway and road transport companies assisting them to become more competitive in the transport and logistics services market.



SPC Malta



The Malta Shortsea Promotion Centre (MSPC) was established in 2005 as an independent unit within the Ports Directorate of the Malta Maritime Authority (MMA). Following the valuable work of the MSPC, private and public stakeholders joined the Centre and the MMA no longer exclusively managed the MSPC. The centre has now been established as a separate organisation from the MMA with its own Executive Committee. The Executive Committee meets on a regular bases and has also succeeded in further attracting new members to the MSPC.



It also participated in various meetings organised both by the European Union and the European Shortsea Network. It has also been quite active by contributing, developing and enhancing co-operation with other Shortsea Promotion Centres through the participation in various EU funded projects.

In order to better maintain its activities of promotion, achieve its objectives and create awareness among stakeholders, the MSPC has developed its web site. Furthermore, the Centre issued press releases and correspondence addressed to key stakeholders emphasising the benefits of shortsea links in Malta, as well as of the shipping and ports industry initiatives aiming at expanding further the maritime transport sector.

The challenge for the centre is to continue to attract new membership, particularly from the land transport mode, in order to be in a better position to enhance its awareness, and to create educational programmes. It will also continue in its work to assist the public authorities to identify the bottlenecks which interfere with the development of short sea shipping, proposing solutions and participating in discussions leading to removal of such obstacles. It has to ensure that Malta continues to benefit from the realisation of the short sea shipping projects in Europe and particularly in the Mediterranean, also within the Euro-Med dialogue process.

During the year under review, the MSPC participated in seminars and meetings organised locally in respect of the Mediterranean Motorways of the Sea projects.

These meetings were a good opportunity to keep abreast on developments in the EU's policy of implementing the motorways of the sea concept.





SPC Norway

SHORTSEA SHIPPING 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 organized under the Maritimt Forum Norway 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 organizations 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 European parties. Please find information below.

More cargo in coastal water transport

In the fourth quarter of 2007, 46.4 million tonnes were handled in Norwegian ports. This is an increase of 5.4 percent from the corresponding quarter in 2006. While the amount of dry cargo increased, there was less liquid bulk.

National website

The website www.shortseashipping.no was further developed in order to contain our main focus areas:

- *Services.* We provide search engines for short sea shipping services to and from European destinations
- *EU/EEA Policy.* We provide information on transport policy for improving the competitiveness, safety and security of short sea shipping
- *News.* We provide neutral information on the possibilities of short sea shipping services in Europe
- *Progress.* We welcome your contribution for improving short sea shipping and transport logistics
- *Partners.* Our partners promote actively sustainable and environmentally friendly transport solutions

European Commission and ESN

SPC Norway participated actively regarding Norwegian comments on the EC Consultation on European maritime transport space without barriers and EC Consultation on Motorways of the Sea. SPC Norway has been quite active for contributing developing and enhancing co-operation between the SPCs, with participation in all ESN meetings and in other conferences organized by members of ESN. It also participated with other SPCs in meetings with the European Commission and with the European Parliament Transport Commission.

National shortsea activities

A series of presentations of national and European initiatives to enhance short sea shipping was delivered through conferences, meetings, round tables, directly or indirectly involved in our sector





SPC Poland



2007 was the 3rd year in tenure of office of the SPC's current Association BOD.

The recently published statistics for the year 2007 reveal the following data covering cargo traffic through Polish Ports in terms of shortsea shipping in e¹:

Cargo traffic:

in total	41,6 m ton, where of shortsea share	78,4 %
<i>Inwards</i>	16,3 m ton	82,0 %
<i>Outwards</i>	25,3 m ton	76,2 %

The Annual Shareholders' Meeting held on the 11th of April 2008 again approved the proposed ways and means of our contribution to the EU Transport Policy. Last year, we were in a position to secure the financial means required to maintain the continuing existence of the SPC and to extend the scope of our activities to several new initiatives.

We were proud to be a co-organiser, in conjunction with Szczecin University and the Maritime Academy of Szczecin, of the Vth Maritime Transport Conference in Szczecin on the 17th of May 2007. The subject of this event was „The Baltic Shipping Range- new challenges for shipping companies and Baltic Sea ports”. In the course of the Conference a book was presented to the audience the content of which corresponded to the main subject of the Conference panel discussions. The Vth edition of the Conference is scheduled to take place in Szczecin on the 15th of May 2008 – see: www.zegluga.szczecin.pl.

By order of the Ministry of Maritime Economy a Group of experts of the Association prepared an expert opinion for the National Focal Point the subject of which was: „An analysis of the potential development of the existing and/or establishing new shortsea connections from Polish Ports”.

A SWOT analysis, prepared by a team of external experts, was included as an integral part of the aforementioned expert opinion.

The analysis was based on a *dedicated questionnaire* addressed to the entire Polish maritime industry including the following chosen stakeholders such as:

- Polish Shipowners' Association;
- Polish Chamber of Forwarders & Logistics;
- Polish Chamber of Maritime Commerce; and
- Maritime Transport Faculty of the Maritime Academy of Szczecin.

In the course of the year, the SPC's experts (chosen on a voluntary basis) made several presentations addressed to the port authorities, forwarders, shipowners, ship-agents, railways, academics, etc. One such presentation included, for instance, „*The Baltic Motorways of the Sea*” Seminar, organised by the Ministry of Infrastructure in Warsaw on 14th December 2007.

In accordance with the ESN Members' manifesto we have begun co-ordinating our activities through a *single-help desk* by including into the SPC's daily routines freight logistics, shortsea, intermodal and MoS related issues.



The SPC's Plan of activities for 2008 includes the following strategic issues:

- Support of TEN-T/MoS and MARCO POLO II projects; and
- Regular updates on the SPC's Internet page www.shortsea.pl with up to date information in due liaison with the maritime industry in Poland and the ESN.

Last but not least, in our daily work we maintain the neutral status of the SPC Association as a non-governmental body and we offer our expertise and skills in an effort to effectively phase in the EU integrated Transport Policy for the years of 2008-2018 into Poland's strategic programmes.

¹ Source: Statistical Yearbook of Maritime Economy 2007, published by Central Statistical Office Warszawa –Szczecin. Table 12 /38/ page 128. Also available on the Internet – see: www.stat.gov.pl



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.



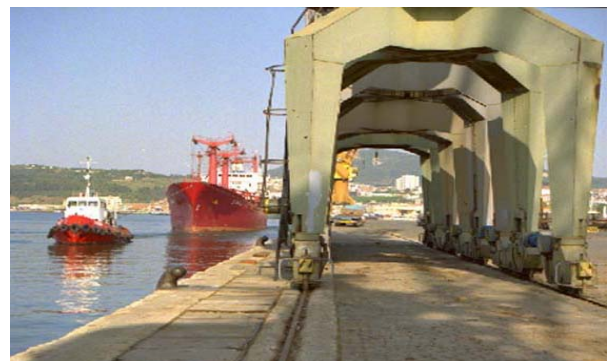
During the year 2007 the SPC – Portugal has acted as ESN Chairman during the 2nd half of the year and has been involved in several initiatives both within the country and abroad such as:

- ❖ Coordination of part of a Seminar (Shortsea shipping and the MOS) dedicated to the Maritime Transport in March in Oporto.
- ❖ Organization of a Workshop together with the Freight Forwarders, the Trucking and the Logistic Portuguese Associations.
- ❖ Participation as a speaker in several national Seminars
- ❖ Coordination of a Portuguese group (40) participants in the 1st Focal Gloss course in the European School of Shortsea Shipping.

- ❖ Participation as a speaker in a SSS Conference in Bruges
- ❖ Organization of the December joint meeting with Focal Points (SSS and MOS), DGTREN and ESN
- ❖ Organization of the II Marco Polo Seminar with 200 participants
- ❖ 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 2007 has been marked by several important events in the scope of the SSS and the Motorways of the Sea. Internally, the Board of directors approved in March the strategic Plan of the Association as frame of reference for the SPC activities, with objectives and concrete proposals of short, average and long action, consolidating the situation of the SPC Spain.



Between the undertaken actions more outstanding it is necessary to mention the meetings with road hauliers and shippers, to identify more closely the problems they find for using of the SSS in their logistic strategy. The meetings held in Barcelona and Vigo were very productive. In both meetings the corresponding Port Authorities as well as the Shipping companies collaborated actively.

It is to emphasize the interest that has provoked the launching of the Simulator of costs of intermodales chains that, once installed in the Web site of SPC Spain, has a long number of hits, from shippers, road hauliers, logistic operators, and also students of courses of logistic and transport.

On the other hand the fourth agreement of the docking sector was signed, in which there is to emphasize the special consideration of the working time for services to SSS lines and Motorways of the Sea. Also, SPC Spain has made a proposal of Ecobono scheme, through Ports of the State.

Another subject to emphasize in the national panorama has been the transposition of the Directive on driving times for the road transport sector.

In the year 2007 it has given an important impulse to the launching of the Motorways of the Sea. On the one hand the calls of projects in the North Sea and another one the Hispanic French joint public call for tenders for the selection of projects relative to the establishment and operation of one or several MoS between Spain and France in the Atlantic.

Between the selected projects to be founded under the first Marco Polo II call for tenders, are seven projects of SSS related to the Iberian Peninsula, three in Atlantic and four in the Mediterranean.

With respect to studies, SPC Spain has initiated a new project, PLAT SSS, financed by the Spanish Ministry of Transport, along with consultant ARUP, the CEDIT and Innovation Strategies on a "Electronic Platform for Intermodal freights using Short Sea Shipping".



As far as the SSS services in Spain concern it is to emphasize the establishment of two new ro-ro services in the 2007: One from Bilbao to Zeebrugge, served by Transfennica, with three weekly calls, and another one from Barcelona to Livorno, by Grimaldi, also with three weekly calls, both with vocation to get to be daily. According to the estimated statistical data there are more than forty SSS services from the South of Europe, shifting near ten millions tons. of cargo from road to sea, of which four millions are shifted in the Mediterranean.



SPC Sweden



The Shortsea Promotion Centre in Sweden – Maritime Forum (in Swedish “Sjöfartsforum”) – was established in 1996. Maritime Forum is an association of 96 paying members. These are companies, organizations and authorities such as shipping lines, port companies, shipbrokers, agencies, universities and schools, unions, banks and finance institutes, shippers and various organizations, authorities and other companies related to the shipping industry. The fees from the members correspond to 88 percent of the income. The additional 12 percent comes from the Swedish Maritime Administration supporting short sea promotion activities.

Object, external target groups and main topics

The object of Maritime Forum is to:

- increase knowledge about shipping as an industry and mode of transportation
- inform about the possibilities and advantages of seaborne trade and transportation
- highlight the important role of shipping both for the society and the industry
- inform about shipping as an interesting sector for employment and education
- stimulate openness, co-operation and discussions within the shipping cluster

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

During 2007 Maritime Forum primarily worked with the information and promotion of intermodal transportation, environmentally efficient seaborne transportation, short sea shipping, inland waterway transportation, new environmentally friendly and sustainable ship design, ports as important hubs, the future shipping challenges, Motorways of the Sea, Marco Polo and recruiting.

Some of the 2007 activities:

- Four breakfast meetings at the Parliament with topics covering presentation of Swedish shipping actors, the growing seaborne passenger traffic, shipping and the environment and innovating intermodal solutions.
- Half-day seminar on shipping and the environment presenting new innovative ship design, a Swedish system for ballast water cleaning, environmental efforts in ports, ferry traffic within Stockholm, etc.
- Summer seminar at the “politician week”, in the city of

Visby on Gotland, the biggest island in Sweden. The main topic was ports being important hubs for intermodal transportation solutions.

- World Maritime Day, a half day seminar on “Shipping and the environment – challenges, possibilities and solutions”.
- Half-day seminar on strategic Swedish ports and infrastructure.
- Speaker at a Climate Conference organised by the Green Party, covering the possibilities of shortsea shipping, inland shipping and intermodal transportation solutions.
- Speaker at Lloyd’s Short Sea Conference in Brugge.
- Co-organisers, participants, moderator and/or part of the advisory board for several shipping and transportation exhibitions or smaller conferences.

Other businesses

Per Jessing, chairman of Maritime Forum 2007, has also been vice chairman European Energy and Transport Forum (EETF) and rapporteur representing European Transport Workers’ Federation presenting a forum opinion on “A European Vision for the Oceans and Seas”.

Maritime Forum was also involved in the promotion work for XML, the study regarding Intermodal Promotion Centres and being advisors to companies regarding participation in Marco Polo and TEN-T programmes.

Year of transition

Internally 2007 was a year of internal changes. The office moved within Gothenburg in the beginning of the year and prepared for a permanent move to Stockholm in January 2008. Per Jessing, chairman of Maritime Forum, left the board at the annual meeting early February after having served the organization since 1996.

Maritime Forum has also during 2007 finalized the tutoring of Grand IV. In addition Maritime Forum and Rail Forum have discussed possible cooperation in order to promote intermodal transportation solutions.

Environmental award

Last, but not least, the Maritime Forum Environmental Award was 2007 awarded Alfa Wall AB for the ballast water cleaning system PureBallast.



SPC United Kingdom



As an island nation, the UK has an enormous coastline per capita ratio. Therefore, the lines are blurred between short-sea, coastal and inland waterways. Sea and Water promotes all three collectively so that water becomes a viable alternative transport mode for freight movements in the UK. At its inception in 2003, Sea and Water faced the challenge of bringing together the largely fragmented water-freight industry.

In 2007, Sea and Water turned its attention to two additional challenges: encouraging potential users to choose water freight solutions and addressing and influencing policy decisions. Sea and Water worked with UK businesses to adapt their supply chains to include water-freight links. We assisted both Sainsbury's and Tesco (two major retailers) with pilot schemes on the River Thames and the Manchester Ship Canal. We also campaigned for the Prescott Lock, a lock-and-control structure that will be utilised to transport building materials by river for the 2012 Olympics.



Other activities

- Hosted a dinner party at the House of Lords to discuss opportunities for water-freight transportation in the UK
- Began work on our recently published report, *A Vision for UK Freight Towards 2018 and Beyond*
- Began work on the CIPROC project, in liaison with other SPCs to encourage inter-modal transport
- Participated in the Olympic Development Authority's Industry Day, the Prince's May Day summit and other key events

- Produced a series of case studies on successful water transport schemes in the UK



In December, Sea and Water restructured to reflect modern governance practices for a membership organisation. This process was consolidated in April 2008. Under this new framework, Sea and Water's core activities for 2008 will include:

- short-sea, coastal and inland waterway promotion
- campaigning for a planning landscape conducive to water-freight transportation
- grants assistance
- assisting UK business with water-transportation opportunities to help them meet their corporate social responsibility goals
- hosting quarterly events
- acting as a conduit between Government and the water-freight industry

For more information, go to www.seaandwater.org





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