



ANNUAL REPORT 2022

EUROPEAN SHORTSEA NETWORK

JULY 2023



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Foreword



MS. ELENA SECO GARCÍA-VALDECASAS

DIRECTOR GENERAL OF THE NATIONAL ASSOCIATION OF SPANISH SHIPPERS' (ANAVE)

CHAIRWOMAN OF THE SPANISH ASSOCIATION FOR THE PROMOTION OF SHORT SEA SHIPPING SPC SPAIN.

It is my pleasure to present this annual report in the year when Spain holds the European Shortsea Network (ESN) presidency. This report provides a comprehensive overview of the activities carried out by the Shortsea Promotion Centres (SPCs) of the thirteen countries that comprise the European Shortsea Network.

The ESN serves as the coordinating body for all Shortsea Promotion Centres within the European environment, working towards the promotion of Short Sea Shipping (SSS) by engaging with key international stakeholders.

Since the 1990s, the European Commission has introduced various regulations and initiatives aimed at the promotion of SSS across Europe. The establishment of Shortsea Promotion Centres aligns with the EU Communication “Developing Short Sea Shipping in Europe: A Dynamic Alternative in a Sustainable Transport Chain.” Currently, 13 Short Sea Shipping Promotion Centres (Cyprus, Finland, Germany, Greece, Ireland, Italy, Malta, Norway, Poland, Portugal, Romania, Spain, Turkey) operate under the ESN umbrella.

Within this report, you will find the extensive range of activities undertaken by the different SPCs, all of which share a common objective: to contribute to the further development of SSS in Europe, fostering a more sustainable, efficient, and competitive transport system.

In 2021, EU Short Sea Shipping recorded a significant increase, with the total gross weight of goods transported estimated at nearly 1.8 billion tonnes, representing a 6.0% rise compared to the previous year. Despite this growth, the levels remain 1% below those observed in 2019. Short Sea Shipping accounted for 60.9% of the total goods transported to and from the main EU ports in 2021, reflecting a 0.5 percentage point increase from 2019. This share represents the highest recorded since 2010 when it stood at 62.5%.

However, the significance of SSS extends beyond these statistics. The European Green Deal and the European Climate Law have set ambitious targets for decarbonizing European economies. In this decarbonization process, SSS must play an essential role in achieving a modal balance and facilitating a more sustainable freight transport system.

The EU has a strategic interest in ensuring the continuous performance of Short Sea Shipping. As by 2050 Short Sea Shipping has a strong role in reaching the EU transport goal of reducing 60% of greenhouse gas emission generated by transport and by 2030 the shift of 30% of road freight over 300 km to other modes.

Furthermore, recent global events, including the pandemic and the Ukrainian invasion, have raised concerns about supply chains heavily reliant on globalization. It is increasingly likely that a process known as nearshoring, involving the relocation of production centres from Asia to closer countries, will take place. The southern shores of the Mediterranean are well-positioned to fulfil this role, making SSS strategically essential for a successful transition and enhancing Europe's competitiveness.

Despite its sustainability and strategic advantages, Short Sea Shipping currently only accounts for 28% of goods transported within the EU, compared to road transport's 53%. SSS faces various challenges that could jeopardize its competitiveness and hinder the achievement of the EU's modal share goals.

The Fit for 55 legislative package which will be gradually implemented, along with the International Maritime Organization's regulations to reduce greenhouse gas emissions, will inevitably lead to increased operating costs for SSS and a loss of competitiveness compared to road transport. The implementation schedule for the Emission Trading Scheme (ETS) for road transport is much longer, exacerbating the challenges faced by SSS. Additionally, the technologies and fuels required to meet these standards have not yet been fully defined or are not available commercially.

Given these circumstances, explicit support for SSS is crucial to ensure its uninterrupted development and the attainment of the modal share objectives. To this end, the following action points should be taken onboard the soonest by our European legislators:

- Implementation of a European eco-incentive, building upon previous successful examples in Italy and Spain, and supported by environmental merits. This eco-incentive has the potential to increase demand for SSS and encourage the shift of freight from road to sea.
- Financial support to shipping companies in the investment process of adapting their fleet to the new environmental requirements.
- Simplification and harmonization of administrative requirements and reporting in port calls through the European Maritime Single Window initiative.

- Digitalisation of customs processes and harmonisation and digitalisation of ship reporting formalities in EU ports, as well as of key documents like the bill of lading.
- The change from Motorways of the Sea to a European Maritime Space in the amendment of the TEN-T regulation, accompanied by the recognition of ships as true transport infrastructure and, as such, eligible for financing.

I firmly believe that Short Sea Shipping is a fundamental pillar of a sustainable, competitive, and efficient European transport system, playing a vital role in ensuring secure and resilient supply chains. Together, we can overcome the challenges and work towards a future where SSS thrives as a preferred transportation mode within the EU.



ELENA SECO
CHAIRWOMAN SPC SPAIN

ANNUAL REPORT

2022



Introduction

This Annual Report covers the period 1 January 2022 to 31 December 2022.

The main focus lay on addressing challenges and opportunities the transport sector is facing and revitalising Short Sea Shipping and its future role within the framework of targets set by the European Commission.

The Board of Administrators.

During this period the administrators were:

- **Francesco Benevolo**, Chairman
- **Maria Pilar Tejo Mora-Granados**, Director (present Chairperson since 1.1.2023)
- **Eduardo Bandeira**, Director
- **Sapfo Papakostopoulou**, Director
- **Jorn Askvik**, Director
- **Markus Nölke**, Director
- **Godwin Xerri**, Local Representative

Meetings were held regularly throughout 2022 (in person and online) and were well attended. While the Chairman oversees the meetings the secretarial services and administrative functions are taken care of by SPC Greece while SPC Poland is in charge of the finances. Malta SPC is the local representative of the Network.



European Shortsea Network

Projects / Activities during the year

Under the Italian Presidency the program of work of the ESN was focused on promoting a debate on the Decarbonisation and digitalization processes of the transport and logistics system, on the evolution of the geopolitical scenarios in Europe and the Mediterranean area, revitalizing the discussions on the future of Short Sea Shipping outlining its role in the framework of the targets set by the Green Deal and other European policies.

In order to collect inputs from the interested stakeholders, the ESN proceeded with the organization of 2 webinars. The 1st ESN webinar "**The importance of eco incentives for Short Sea Shipping and the maritime sector**" was held on 25 May 2022. The 2nd ESN webinar "**Digitalization and environmental sustainability as drivers in the change of Short Sea Shipping**" was held on 25 July 2022.

On the basis of the results and the outcomes of the 2 webinars, the ESN elaborated a Paper which has been illustrated within the ESN Conference "**Short Sea Shipping: Challenges and Opportunities towards 2027**" held on 29 September 2022 in Naples.

The Paper is composed of six chapters. Chapter 1 gives an overview of the ESN and of its role in promoting SSS. Chapter 2 illustrates the current economic framework and SSS traffic flows, whereas Chapter 3 presents the strategic role of SSS in the framework of international and EU policies such as the GHG strategy by IMO, the Green Deal, the EU Taxonomy and the Smart and Sustainable Mobility Strategy. Chapter 4 examines the importance of eco incentive schemes targeting demand and Chapter 5 gives an overview of the most important EU financing opportunities for SSS. Finally, Chapter 6 lays out 8 recommendations for the development and promotion of SSS in the upcoming years underlining the central role of the ESN for the promotion of SSS and the importance of reaching an economically sustainable green and digital transition.

A public consultation process was set up, which resulted in the inclusion within the present Paper of the contributions from: European Commission (**MOVE.DDG2.D**), Assarmatori, Confitarma and Tarros Group.

Steps Ahead

The next decades will shape the future of Transport and Mobility of both people and goods and SSS will have a crucial role in this process. At the same time, the digital transition is becoming increasingly important for all sectors and transport in particular. Digital technology and infrastructure have a critical role in our private lives and business environments.

We rely on them to communicate, work, advance science and answer current environmental problems. At the same time, the COVID-19 pandemic highlighted not only how much we rely on our technology to be available to us, but also how important it is for Europe not to be dependent on systems and solutions coming from other regions of the world. Paving the way for achieving this goal is the EU digital programme, which will have a relevant impact on the transport sector and on SSS. On the other hand, the pandemic highlighted the weaknesses of European supply chains and their excessive dependence on physically distant countries. Therefore, a process of regionalization of production is foreseeable, especially towards the countries on the southern shore of the Mediterranean, which will increase and strengthen the demand for SSS.

Moreover, the current geopolitical crisis in Ukraine has demonstrated that the EU needs reliable energy sources and a flexible and modular transport system. In order to achieve such system, it will be necessary to rely much more on seaborne transport rather than land transport, which is by definition more rigid.

Considering the above, all Member States are implementing sectorial policies through their national RRF plans and other EU funding programmes such as CEF, Horizon Europe and Interreg in order to face the climate and digital challenges, reaching the goals of Carbon Neutrality by 2050 and the intermediate goals of 2030 as indicated by the Green Deal and enshrined in the EU climate law.

Short sea shipping will have a crucial role in reaching the environmental targets set by the Green Deal, with reference to the digital and environmental transition of SSS and in the context of the geopolitical and pandemic crises.

Shortsea Promotion Centre Croatia



Main actions 2022

Intermodal Transport Cluster as the SPC in Croatia is continuously working on developing and promoting intermodal transport through EU funded projects, as well as promoting renewable energy sources, environmental protection and energy efficiency.

Best practices:

- **Susport**

SUSPORT (Sustainable ports) is a project funded by the Interreg Italy – Croatia cross-border cooperation Programme, focusing on increasing the environmental sustainability and energy efficiency of ports in the Programme area. The partners within SUSPORT intend to strengthen the institutional capacity and cross-border management of the involved ports, increasing the environmental sustainability and energy efficiency of maritime transport, which is the most sustainable way of transporting goods from an



environmental and energy efficient point of view.

SUSPORT project is in its last stages, and during the last year, many ports implemented its pilot activities. Besides that, SUSPORT developed a cross-border strategy to strengthen port environmental sustainability and energy efficiency, to which the partners will commit by signing a joint protocol, leading to the institutionalization of a permanent cross-border cooperation network. The project includes an incredibly large number of ports participating as project partners, and those include the ports of: Dubrovnik, Ploče, Split, Zadar and Rijeka from the Croatian side, and Trieste, Monfalcone, Venice, Choggia, Nogaro, Ravenna, Ancona and Bari from the Italian side.

- **Digsea**

DIGSEA (Digitalisation of multimodal transport in the Adriatic Sea) is project funded by the Interreg Italy-Croatia cross-border cooperation programme, focusing on clustering the technical knowledge in a unique approach. Maritime transport is the most sustainable way of transporting goods, but the fragmentation of the supply chain hinders the potential it offers. DIGSEA project clusters the technical knowledge of



several Interreg IT-HR 2014-2020 projects that deals with ICT applied to maritime and multimodal transport.

The collected knowledge will be consolidated in a single sea-port-hinterland-logistics approach, covering the whole supply chain. This way, the experiences and expertise of the current programming period will serve as a basis for the new one, ensuring their long-term sustainability and replicability.

The mission of the project is to transfer knowledge and raise the awareness of the use of ICT as a powerful and efficient tool to improve the efficiency and consequently the environmental performance of ports and the whole supply chain.

- **Programme and Project initiatives**

Intermodal Transport Cluster remains an active partner on 7 EU projects funded by different cross-border and transnational programmes - SUSPORT, REMEMBER and DIGSEA are implemented within Interreg Italy - Croatia, SHAREMED and MED OSMoSIS

are implemented within Interreg Mediterranean, MultiAPPRO PLUS and NEWBRAIN PLUS are implemented within Interreg



ADRION. Intermodal Transport Cluster participates in these projects in multiple roles, including Lead partner role, Work package leader role, Communication leader role and Project partner role. Intermodal Transport Cluster aims



at implementing activities which support SSS and intermodal transport on the national, regional and transnational levels.



Outlook 2023

Continue with promoting SSS, intermodality, environmental protection and energy efficiency through EU funded projects, and by participating at conferences and workshops, publishing promotional material for the entire intermodal sector in Croatia, always keeping the institutional website up to date, to help interested parties find information on about intermodality and shortsea shipping, publishing articles about best practices and EU projects in implementation.

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Shortsea Promotion Centre Cyprus

Main actions 2022

The Cyprus Shortsea Promotion Centre (CSPC) was established by the Cyprus Port Authority (CPA) in 2008. In 2012 the management was transferred to the Maritime Institute of Eastern Mediterranean (MARINEM).

In 2022, with the consent of the CPA and MARINEM, the newly established Cyprus Marine and Maritime Institute (CMMI)¹ - www.cmmi.blue, took up the role to represent Cyprus in the European Shortsea Network.

- **Long-term vision**

In its SEACHANGE 2030 - **A STRATEGIC VISION FOR CYPRUS SHIPPING** strategy published in 2021, the Deputy Ministry for Shipping included the support for the creation of a sustainable coastal passenger craft sector as one important element in ensuring a sustainable future for Cyprus shipping. Specifically, action point 35 states that steps will be taken to **“Promote coastal tourism by creating a sustainable framework for the coastal passenger craft sector through a targeted state aid scheme**



¹ CMMI was established as a “Centre of Excellence in Marine and Maritime Research, Innovation and Technology Development” through European Union and Republic of Cyprus funds.

(de Minimis) to prevent pollution, improve safety and to facilitate access to people with reduced mobility in support of the National Tourism Strategy”².

- **Main actions for 2021-2022 / Current projects and efforts**

CMMI is currently undertaking innovative research across different themes, to facilitate the transition to zero-emission maritime transports. This effort often focuses on shortsea shipping as this transport sector will be the first to make the transition. Specifically:

- **ZEST (Zero-Emission Sea Transporter):** will design and manufacture a fully electric innovative vessel. The vessel will serve numerous purposes, including testing new technologies of propulsion and autonomy and educational activities to promote ocean literacy.



- **Integrated Ship Energy Flowchart model (ISEF):** aims at providing reliable estimation of ship energy consumption for propulsion and power generation based on actual and (near) real-time data (including estimation of SFC based on ship characteristics, engine type & age, maintenance history, and weather conditions through a standalone Matlab/Simulink model that utilizes AIS data as well as field data).
- **BioCH4-to-Market:** Founded on innovative and breakthrough technologies, the proposed pilot action seeks to prove up to 80% reductions in lifecycle Green House Gas (GHG) emissions using BioMethane as an advanced marine drop-in biofuel. This



will enhance market access through added value for small-scale decentralised biogas production within the

maritime transportation sector. Such an innovation can turn organic waste management into a distinct opportunity, boosting local economies, and fostering socioeconomic prosperity in developing and emerging countries.

² [EN Two-face Strategy Redesign \(cyshippingstrategy.com\)](https://www.cyshippingstrategy.com)

- **Green Marine:** aims to accelerate climate neutrality of waterborne transport through retrofitting existing fleets with cost and emission control solutions. The proposed



solutions include carbon capture mineralisation, energy savings for HVAC systems through air reuse, carbon and water capture with membranes, and the use of excess engine heat to produce syngas. The technologies will be tested on-land and those selected will be piloted onboard a vessel.

- **BioCNG-to-Cold Ironing:** envisages to provide green electrification of ships either at berth or anchorage areas. A barge will be designed and build to carry a marine engine genset powered by compressed biomethane that will act as cold ironing.



Outlook 2023

CMMI will be offering VET programs to address the needs of shipping that are related to personnel’s upskilling and reskilling as of September 2023. Specifically, the following programs will be available:

- Introduction to shipping
- Decarbonisation in shipping techniques and methodologies
- Decarbonisation in shipping alternative fuels

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Shortsea Promotion Centre Finland

SPC Finland

Main actions 2022



SPC Finland's main publication is the annual Shipping Company Barometer. The latest barometer was published in January 2023. The barometer is based on a questionnaire for the main shipping companies operating to and from Finland. It provides annual information on shipping trends and on ship owners' views on topical issues, as well as the forecasting indicators of export and import of Finnish shipping industry. The barometer report is published in Finnish and Swedish. The survey is financed by the Finnish Transport and Communications Agency Traficom, Finnish Ship owners' Association, Shipbrokers Finland and the Government of Åland.

Outlook 2023

- Implementation and participation in clean shipping related projects
- Promotion of shortsea shipping in the context of sustainable Blue Economy

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Shortsea Promotion Centre Germany

Main actions 2022

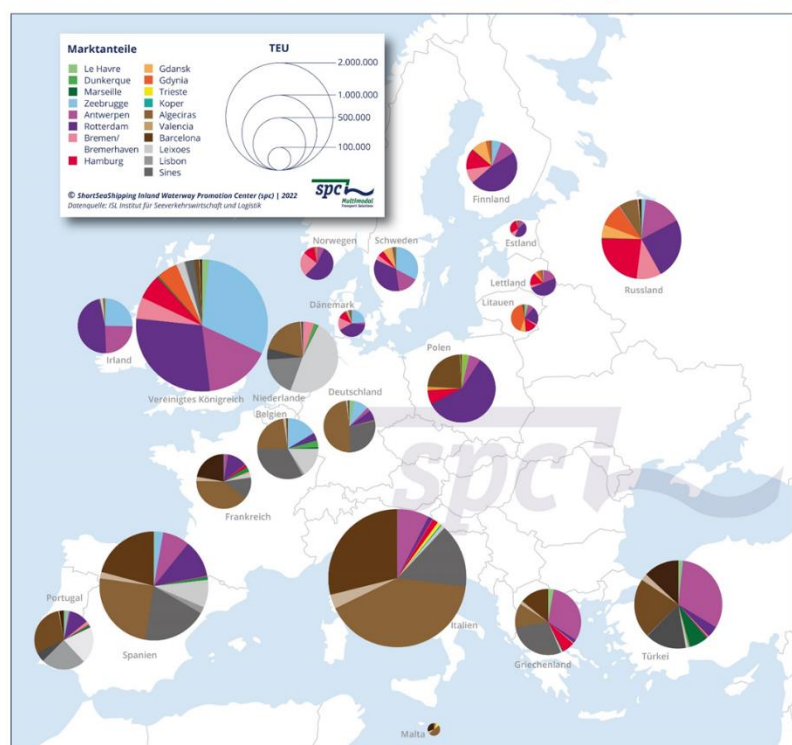
Overview from the perspective of the German Shortsea Promotion Centre

As reported by the Federal Statistical Office (Destatis), total goods handled by German seaports in 2022 amounted to 279.1 million tons of goods. That short sea shipping again played a considerable role is shown by Sweden and Norway, which were the most important partner countries with 24.4 million tons (Sweden) and 22.7 million tons (Norway), ahead of the United States (22 million tons) and China (20.9 million tons). Despite all this, the volume of goods handled decreased by 3.2% compared to the previous year, with exports dropping more than imports. Short sea shipping thus continues to be very important for the German seaports.

The network of federal waterways in Germany comprises approximately 7,300 kilometers of inland waterways, of which approximately 75 percent are rivers and 25 percent are canals. The federal waterways also include approximately 23,000 square kilometers of sea waterways. In addition to the seaports, there are a high number of inland ports and transshipment terminals in combined transport.

The importance of short sea shipping in the container segment is

Shortsea-Land-Verkehr der Hub-Häfen in der Le Havre-Gdansk-Range 2020 (5,6 Mio. TEU)



shown in the chart below, which was produced on behalf of SPC Germany by the ISL Institute of Shipping Economics and Logistics. The chart also demonstrates once again, based on the market shares, that short sea trade is a Europe-wide idea.

Activities of SPC Germany

As the Corona pandemic is almost over, more and more activities could be carried out. But digital seminars have proven their worth, so we will continue with these formats. Among the most recent seminars were the "Shortsea Market Baltic" and "Shortsea Market Sweden" seminars.



In addition, the 4th Shortsea Shipping Days took place in Lübeck on 07 & 08 September 2022, where we welcomed over 300 registrations, 20 speakers and 35 exhibitors.

Of course, SPC Germany was also at the transport logistic trade fair from 09 - 12 May 2023 in Munich. As the leading international trade fair for logistics, mobility, IT and supply chain management, many new contacts were established and existing partnerships were cultivated. The shortsea scene was also prominently represented.

Outlook 2023:

- Continuation and intensification of the core activities of SPC Germany in the areas of promotion, counselling, information, training and securing skilled labor.
- The next attendance event will be the 21st theme evening in Neuss in cooperation with Contargo.

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Shortsea Promotion Centre Greece



Main actions 2022

- Continued cooperation with Greek Maritime Universities, focus on supporting academic transport research and collecting data on intermodal transportation.
- Networking with stakeholders (government, ports, shipping lines) explaining how moving cargo from road to sea can benefit EU's transport strategy and "Fit for 55" agenda.
- Articles to shipping press promoting the advantages of shortsea shipping.
- Continued involvement in LNG bunkering project POSEIDON MED II.



**POSEIDON
MED II
LNG
BUNKERING
PROJECT**

Outlook 2023

- Replacement of the EU Short Sea Fleet with new vessels built.
- Expansion of activities to include other players along the supply chain.
- Become a confidential partner for shipping lines, ports and cargo owners.
- Promotional activities which include conference co organized with Logistics & SCM Division, keynote speaker at main conferences concerning shortsea shipping.

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Shortsea Promotion Centre Ireland

Irish Maritime Development Office



Main actions 2022

- **IMDO Organised and Main Contributor Events 2022:**
 - **Atlantic Strategy Training and Education Webinar (a joint initiative organised by Pillar 1 (Ports Coordinator) and Pillar 2 (Training & Education Co-ordinator)).**

The IMDO were responsible for the organisation of the Atlantic Strategy Training and Education webinar. The online event organised as a joint

The logo for Atlantic Strategy, featuring the text "ATLANTIC STRATEGY" in a teal, sans-serif font above "Supporting the Atlantic Action Plan" in a smaller, dark blue font. To the right is a stylized blue and teal wave graphic.

ATLANTIC STRATEGY
Supporting the Atlantic Action Plan

initiative by two pillars: Pillar 1, represented by the Ports Coordinator, and Pillar 2, represented by the Training & Education Coordinator. The aim of the Webinar was to facilitate collaboration, knowledge sharing, and capacity building among participants to support the implementation of the Atlantic Strategy and contribute to the sustainable development of the Atlantic area.

The Atlantic Strategy is a comprehensive framework and action plan aimed at promoting sustainable development and cooperation among regions and stakeholders in the Atlantic area. It covers a wide range of sectors, including maritime affairs, environment, tourism, energy, research, and innovation.

- **Department of Foreign Affairs Event on Post-Brexit Trade Patterns Post Brexit**

The Irish Maritime Development Office (IMDO) made significant contributions to the Department of Foreign Affairs event on "Post-Brexit Trade Patterns" in Dublin. As one of the

main event contributors, the IMDO played a crucial role in shaping the discussions and providing expertise on the maritime implications of Brexit on trade patterns.



THE IMPLICATIONS OF BREXIT ON THE USE OF THE LANDBRIDGE



The event focused on examining the changes in trade dynamics and patterns between Ireland and the United Kingdom following Brexit. With the United Kingdom's departure from the European Union, new challenges and opportunities emerged in cross-border trade, particularly in the maritime sector.

As a key participant, the IMDO provided valuable insights and analysis on the impact of Brexit on maritime trade flows, customs procedures, regulatory frameworks, and logistics. We shared our expertise on navigating the post-Brexit landscape and offered strategic guidance on optimizing trade routes, mitigating disruptions, and seizing opportunities for Irish

businesses.

– Trade Mission: Irish Ambassador to Greece

The Irish Maritime Development Office (IMDO) played a significant role as a main event contributor in the trade mission organised by the Irish Ambassador to Greece, specifically focusing on exploring maritime opportunities in Greece. This engagement aimed to strengthen bilateral trade relations between Ireland and Greece, particularly in the maritime sector.

As a main event contributor, the IMDO brought its expertise and knowledge of the maritime industry. We actively participated in discussions, shared insights, and provided valuable guidance to Irish businesses and stakeholders seeking opportunities in Greece's maritime sector.

– Trade Mission to the Netherlands.

During the Trade Mission to the Netherlands organised by the Department of Foreign Affairs, the Irish Maritime Development Office (IMDO) played a significant role as a main contributor. This collaboration aimed to enhance trade relations between Ireland and the Netherlands, particularly in the maritime sector.

– Dutch Trade Visit to Ireland. Cork.

The Dutch Trade Visit to Ireland, organised by the Dutch Embassy in Ireland in collaboration with the Irish Maritime Development Office (IMDO), served as a platform to strengthen trade



relations between the Netherlands and Ireland. As the event



organiser, the IMDO played a pivotal role in ensuring the visit's success and facilitating productive engagements

between Dutch and Irish businesses in the maritime sector.

– Port Directors Training Days

On behalf of the Department of Transport in Ireland, The Irish Maritime Development Office (IMDO) organised and facilitated "Port Directors Training Days" in Dublin. This event focused on the topic of ports legislation, aiming to provide training and insights to port directors and relevant stakeholders in the maritime industry.

As the event organiser and facilitator, the IMDO played a central role in ensuring the success and effectiveness of the Port Directors Training Days

● IMDO Speaker / Panelist Opportunities in 2022

– Seafarer Conference hosted by NMCI/Simply Blue Conference.

The topic of the conference focused on training and education for the Ocean Renewable Energy (ORE) industry, specifically discussing whether Ireland is ready and what success would look like in 2030. The conference topic is relevant for a number of reasons.



As a panellist at the conference, Liam Lacey, representing the IMDO, brought valuable expertise and insight in the maritime and renewable energy sectors. The IMDO's involvement in this discussion demonstrates our deep understanding of the ORE industry and

Ireland's readiness to harness its potential. The speaker opportunity at the Seafarer Conference provided the IMDO with a platform to share our expertise, promote collaboration, and shape the future trajectory of the ORE industry in Ireland.

– The Renewable Energy Opportunity for the West Coast of Ireland

The Irish Maritime Development Office (IMDO) participated in "The Renewable Energy Opportunity for the West Coast of Ireland" event held in Galway. The focus of the event was

on the development of floating wind energy in the region. Liam Lacey, representing the IMDO, took on the role of a speaker and displayed the IMDO expertise and insights in the field. As a speaker, the IMDO’s Director Liam Lacey provided valuable knowledge and perspectives on the potential of floating wind energy in the West Coast of Ireland.

– **TEN-T Co-ordinators Working Group**

The Irish Maritime Development Office (IMDO) participated in the Ten-T Coordinators Working Group on Ports held in Huelva. The focus of the working group was on the future development of EU ports and trade flows. In this event, the IMDO took on the roles of both session chair and panellist, signifying their active involvement and expertise in the maritime industry.

As the session chair, the IMDO played a crucial role in overseeing and moderating the discussions during the working group. Ensuring that the session proceeded smoothly, provided guidance on the agenda, and facilitated an engaging and productive environment for all participants.

– **RWE Wind Energy Europe Conference**



The Irish Maritime Development Office (IMDO) participated in the RWE Wind Energy Europe Conference held in Bilbao, Spain, with a focus on offshore renewable energy. Liam Lacey, representing the IMDO, took on the role of a panellist at the conference.

As a panellist, Liam Lacey contributed to the discussions on offshore renewable energy, sharing perspectives on the industry's development and future prospects. Discussions took place on Ireland's achievements, challenges, and opportunities in the offshore renewable energy sector, highlighting the country's commitment to sustainable energy and its potential as a hub for offshore wind projects.

– **Connecting Europe Days**

The IMDO's presence at Connecting Europe Days, with a focus on the European Green Deal, allows them us to align our activities with EU policy objectives. We can foster collaboration, gain knowledge, influence policy discussions, and enhance their visibility in the field of sustainable maritime development. It positions the IMDO as an active and engaged participant in advancing the goals of the European Green Deal and contributing to a greener and more sustainable future.

● **IMDO Activities in 2022**

In 2022, the IMDO (Irish Maritime Development Office) actively participated in a number of national and international events. By attending these events the IMDO made valuable

contributions to the maritime sector. A brief overview of our attendance and contributions are outlined below.



– **Enterprise Ireland Offshore Wind Forum:**

IMDO's participation in this forum focused on offshore wind energy development. As a speaker/panellist, the IMDO shared insights and expertise on the potential of offshore wind in Ireland, highlighting opportunities for growth and innovation in the sector. This input helps promote the advancement of offshore wind energy and positions Ireland as a key player in the renewable energy arena.

– **European Logistics Innovation Days Event**

By attending the European Logistics Innovation Days event, the IMDO demonstrated its commitment to staying updated on the latest trends and innovations in logistics and supply chain management. Our participation allowed the IMDO to gain valuable insights into emerging technologies, best practices, and industry developments, enabling them to provide informed guidance and support to the maritime sector in Ireland.

– **MIIN Virtual Event: Blue Skills and Training in the Marine & Maritime Industry - Opportunities for Growth**

The IMDO's participation in this virtual event focused on the importance of blue skills and training in the marine and maritime industry.

– **Blue Economy Tech Days Conference: Sustainability & Blue Economy**

Attending the Blue Economy Tech Days Conference, the IMDO highlighted the importance of sustainability in the blue economy. By being present at the event, the IMDO showcased its commitment to promoting environmental practices, innovation, and sustainable development in the maritime industry. This in turn contributes to the overall goal of achieving a more sustainable and resilient blue economy.

– **Transport Research Arena (TRA) Conference 2023: European Mobility Trends, Research, and Innovation**

The IMDO's attendance at the TRA Conference highlights its interest in the latest mobility trends, research, and innovation in Europe. By actively participating in this event, we gain insights into technologies, policy developments, and research initiatives. This knowledge enables the IMDO to provide informed advice and guidance on European mobility trends and promote innovation within the Irish maritime sector.



- **IMDO Focus for 2023**

- **Economic Data and Analysis**

The IMDO will launch the 19th volume of the Irish Maritime Transport Economist in May 2023. This annual publication of statistical reporting and data analysis in volume 19 provides stakeholders with valuable insights into the performance, challenges, and opportunities within Ireland's maritime sector. This information equips industry professionals, policymakers, and researchers with the necessary tools to make informed decisions, develop strategies, and promote sustainable growth in the sector.

- **MaritecX/CMMI**

As advanced partners in the EU-funded project, the "Marine and Maritime Research, Innovation, Technology Centre of Excellence" (MARiTeC-X/CMMI). The IMDO remains committed to its involvement and this project is a collaborative endeavour aimed at establishing CMMI as a cutting-edge research, technology development, and innovation centre in the marine and maritime sector.



By participating in MARiTeC-X/CMMI the IMDO continues to actively contribute to the advancement of the maritime industry. The European Union's support for this initiative underscores its commitment to fostering excellence and driving innovation in the sector.

Through this partnership, the IMDO influences its expertise and resources to support the establishment of an outstanding research and innovation hub in Cyprus. CMMI will serve as a catalyst for collaborative efforts, bringing together industry leaders, researchers, and innovators to address key challenges and seize opportunities in the marine and maritime sector.

- **Digitalisation**

In March 2023 the Irish Maritime Development Office, in conjunction with partners Dublin Port and Ports de Normandie organised the launch of the International Fast and Secure Trade Lane project.

The project explored the benefits of digitalisation in ports, improving connectivity between sample ports in Ireland and France, with a view to further expansion. The organised event explored the results of the IFSTL project, the stakeholder perspective on digitalisation and the activities of IFSTL, as well as the future of digitalisation in ports.

- **TRA2024**

The Transport Research Arena (TRA) is the foremost European transport event that covers all transport modes and all aspects of mobility.

The 2024 edition of TRA will take place in Dublin from the 15th – 18th April and the selected theme is Transport Transitions: Advancing Sustainable and Inclusive Mobility. TRA is a major transport conference that covers all transport modes and discusses all aspects of mobility.

This event offers a great venue for researchers, policy makers and industry representatives to get together and contribute to the discussion on how research and innovation can reshape the transport and mobility system. The conference provides a unique opportunity to hear about mobility trends in different parts of Europe, learn from achievements in industry as well as share best practices of policies and deployments.

Offering a rich and diverse conference experience, with extensive exhibitions, demonstrations and technical tours complementing the extensive conference programme. The conference provides a unique opportunity to hear about the latest mobility advances across Europe and elsewhere, learn from industry achievements, and share best practices on policies and deployment. Irish Maritime Development Office are contributors in the organisation of #TRA2024.



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Shortsea Promotion Centre Italy



Main actions 2022

In the framework of the 2022 Italian presidency of ESN, RAM as SPC Italy organized numerous online meetings (16/02/2022- 13/04/2022- 16/06/2022) aimed at identifying activities and initiatives to implement the ESN Work Program for 2022, which it was approved by all SPCs during the ESN online meeting on 04/13/2022. The ESN 2022 Programme had as its objective the revitalization of the discussion on the future of short sea navigation in the context of the challenges of the Green Deal and the Strategy for sustainable and intelligent mobility of the European Commission.

This plan included the organization of two webinars, the participation in the Naples Shipping Week (NSW) with a dedicated ESN workshop and the elaboration of the **ESN Paper**.



The first webinar **“The importance of eco incentives for SSS and the maritime sector”** (25/05/2022) was an opportunity to discuss important issues such as the development of eco-incentive schemes for maritime transport and the current framework defined by the guidelines of the European Commission on state aid to maritime transport. The second webinar

“Digitalization and environmental sustainability as drivers in the change of SSS” (25/07/2022) was an opportunity to present the main existing IT technologies and the green solutions adopted in maritime transport by the Member States involved in the ESN, illustrate the opportunities for European funding and start a discussion between stakeholders.

On the basis of the results of the two seminars, the **ESN Paper** was drawn up with various **recommendations on the future development of the SSS** in the context of the ambitious challenges of the digitization process of the transport and logistics system, as well as the evolution of the European geopolitical scenario and of the Mediterranean



SHORT SEA SHIPPING
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area. The ESN [position paper](#) was presented during the Workshop "**SSS 2027: Challenges and opportunities**" (Naples, 09/29/2022) encouraging a discussion between the representatives of the institutions and national and EU stakeholders on programmes, development opportunities and future scenarios of short sea shipping



in Europe. The ESN Paper was the subject of a **public consultation** which ended on 31st October 2022 and **was presented** by RAM, as SPC Italy, **to the European Commission** (DG MOVE, Waterborne) during a meeting which took place on 1 December 2022. During the meeting, the Commission expressed strong interest in the initiative to revitalize the network, gave a positive assessment of the Paper and shared some considerations. A new meeting with the Commission is scheduled for the first half of 2023, which will also be attended by SPC Spain who will be entrusted with the rotating presidency of the network.

The other main activities carried out by SPC Italy are:

- Support the implementation of the National Strategic Plan for Ports and Logistics.
- Contribution to the review of Motorways of the Sea Detailed implementation Plan (DIP MoS) of the European Coordinator, prof. Kurt Bodewig.
- Participation to the revision process of the TEN-T regulation and to the drafting of the CEF 2 regulation as TA to the IT Ministry.
- Participation to EU projects on SSS: INTESA, PROMARES, ADRI-UP, DIGSEA.
- Participation in international events related to SSS and MoS such as:
 - MED WG on freight traffic along the Mediterranean Corridor (Milan, 04/03/2022).
 - The future of the European union strategy for the adriatic-ionian region (Webinar, 07/04/2022).
 - Participation to the 7th annual EUSAIR forum “EU-Youth-AIR cultural exchange” (on-line - Tirana, 16-18/05/2022).
 - INTESA Final event “Information Technology as a driver for better maritime and ports’ operations: a joint Italian & Croatian perspective for the Adriatic Sea” (09/06/2022).
 - MED WG on passenger transport along the Mediterranean Corridor (Barcelona, 10/06/2022).

- Connecting Europe Days 2022 (Lyone, 28-30/06/2022).
- Digital MoS Forum (Bruxelles, 16/09/2022 and virtual meeting 4/10/2022).



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Outlook 2023

Initiatives promoted in the framework of the Spanish Presidency of the ESN for 2023:

- Update of the [position paper](#) elaborated by the ESN on the basis of the results of the discussion with the European Commission (a meeting is scheduled for the first half of 2023)
- International Exhibition for logistics, mobility, IT and supply chain management (Munich, 09-12 May 2023)
- Scouting of funding options for SSS projects in the 2021 - 2027 MFF and of new possible projects to participate in.
- Updating of the ESN website in close cooperation with all SPCs.



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Shortsea Promotion Centre Malta

Main actions 2022

The following is a recap of the main activities of the Malta Maritime forum throughout 2022.

In the year in review, the Malta Maritime Forum has taken a proactive role in advocating the industry's stance on a number of policy issues, both through innovative proposals to support the development of the sector within the Maltese economy as well as by providing feedback to international developments and national policy changes affecting the same industry and its stakeholders.

- **Shortage of Blue Skills**

The lack of skills afflicting the maritime sector is leading to a worrying situation disrupting the creation of wealth and enhancement of living standards. Rewarding opportunities made available by the industry remain unfulfilled mainly due to lack of awareness and proper career guidance structures. The situation poses serious risks on business continuity and competitiveness which in turn could jeopardise Malta's leading position in shipping on an EU and global scale.

Conscious of the situation, throughout the year the MMF has not only raised this issue at the relevant fora but also sought to elevate this challenge to the national level by co-organising a conference dedicated to Blue Skills on 12 May 2022 together with the Maltese National Hub for West MED, an EU-funded Initiative.

- **Sanctions and Restrictive Measures**

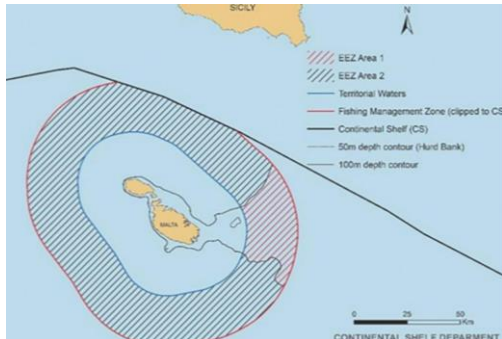
The year in review was dominated by the tragic events evolving in Ukraine and the subsequent repercussions in terms of sanctions against Russia. The MMF is closely following the developments emerging from the Council of the European Union in response to actions undermining or threatening the territorial integrity, sovereignty and independence of Ukraine.

The context of these sanctions highlighted the importance of the Forum's role as a bridge between Transport Malta and industry for the purposes of formulation and



communication of the various Port Notices issued following the numerous rounds of these restrictive measures.

- **Exclusive Economic Zone**



The Forum has articulated its position in response to a consultation document published by the Ministry of Finance entitled “Exclusive Economic Zone – A Sea of Opportunities”. For the purposes of this position paper, the MMF had also appointed an ad hoc working group.

- **Transport Malta Demerger**

Further to the flagship recommendation made by the Malta Maritime Forum in its pre-election proposals document for the re-establishment of a dedicated authority for maritime affairs and subsequent announcement of a related Cabinet decision in October 2021 by then Minister Ian Borg to take forward this proposal, the MMF became engaged in consultations with a specially appointed Working Group.

The Forum considers this move as a reflection that the maritime industry merits a high position in terms of policymaking in the country, bringing it in line with the importance given to other key economic pillars such as tourism, manufacturing, financial services, gaming, ICT and several others.

Upon the conclusion of discussions, the MMF submitted a policy paper containing its opinions on specific areas related to the new legislation. The feedback provided to the Working Group highlighted the priority required by the industry for a specialized, dedicated, knowledgeable and well-resourced authority with an advantaged position to play an active role within the international maritime industry by pro-actively contributing towards international issues that have a bearing on the Maltese maritime industry. The industry further contends that it cannot be regulated by an authority within an authority because it is dynamic and needs timely, proactive and immediate responsiveness.



This position was also highlighted during a consultation meeting hosted by the relevant Ministry in November 2022.

- **A Dedicated Maritime Court**

The Malta Maritime Forum advocated the need for the establishment of a dedicated Maritime Court as part of its pre-electoral proposals in July 2021. This proposal stemmed



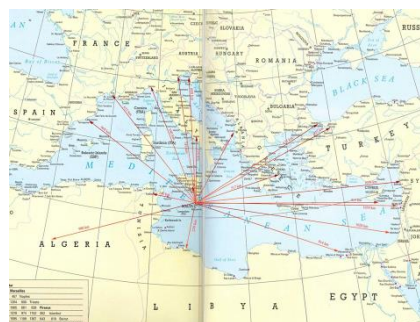
from its belief that maritime cases are specialized cases involving specialized lawyers and likewise should be heard by a specialised court. It would also strengthen the present administrative structure and send the right message to the international maritime community and international trade.

The MMF continues to pursue this matter with the relevant Ministries and in public fora.

- **Fit for 55**

During the period under review, the MMF teamed up with other organisations, namely the Malta Business Bureau (MBB) and the Malta Maritime Law Association (MMLA) to pool resources and analyse the implications of the European Commission’s Fit for 55 packages on the maritime industry.

The Forum has argued that the EU’s plans and decarbonisation targets for shipping need to be fully aligned with those of the International Maritime Organization (IMO). In the absence of this, the main shipping business, investment and traffic could be diverted away from EU Member States to the detriment of EU-based companies, shipping lines and ports which would become used predominantly by feeder vessels for the avoidance of carbon taxes. Moreover, such business diversion would have no positive environmental result.



Meanwhile, specialised desk research is still ongoing internally by the MMF, drawing on resources made available by the International Association of Independent Tanker Owners, INTERTANKO, Royal Belgian Shipowners Association (RBSA), UMAS and the EESC.

- **Communications and Outreach 2022**

During 2022, the MMF sought to strengthen its communication efforts, both internally among its members as well with external stakeholders and the general public, through:

- Circulars to Members
- Focus Group on Ensuring the Skills for Future Competitiveness – 24th June 2022
- MMF Membership Networking Event – 12th July 2022
- Addressing the IBIA Mediterranean Energy and Shipping Conference – 13-15 September 2022
- MMF Progress Meeting – 24th November 2022
- MMLA Annual General Meeting – 2nd December 2022
- Publications and Other Media

Outlook 2023

- Proposals and Reactions to Budget 2023

For the second year running, the MMF has presented a set of tangibles, maritime-focused proposals for the national Budget, which it presented in person to the Minister of Finance in September.

The MMF's proposals were as follows:

- Detach maritime industry responsibilities from TM and re-establish a National Maritime Authority
- Establish a dedicated Maritime Court
- Invest in ensuring the Skills and Competences Required in the Maritime Industry
- Partner with the MMF towards the formulation of a National Integrated Maritime Policy for Malta
- Exclusive Economic Zone
- Land Reclamation
- Partner with the MMF to establish a PPP arm for the Maritime Industry
- Introduce Standard Operating Procedures for Bunkering
- Offer its full and unrelented backing to local and foreign investors in the maritime industry.

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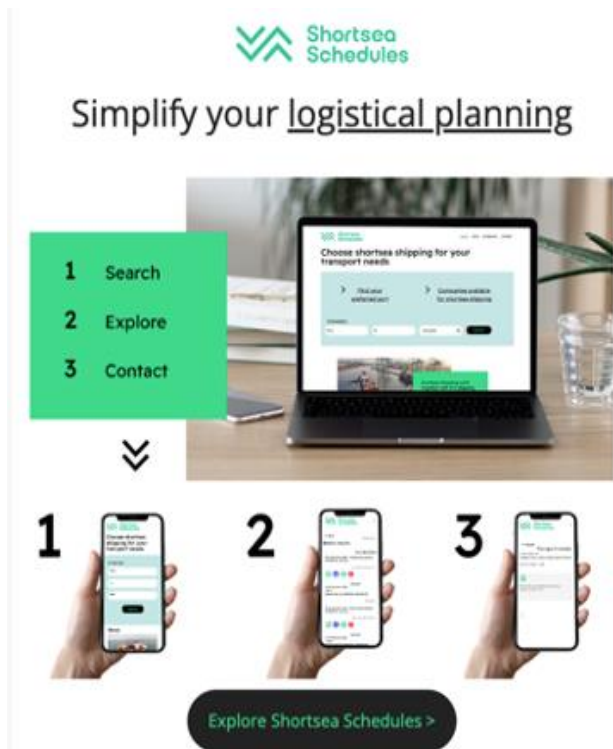
Shortsea Promotion Centre Norway

Main actions 2022

- **Regular content production**
 - Web, social media, monthly newsletter
 - Articles to general press and interest organizations

- **Cargo-owner survey**

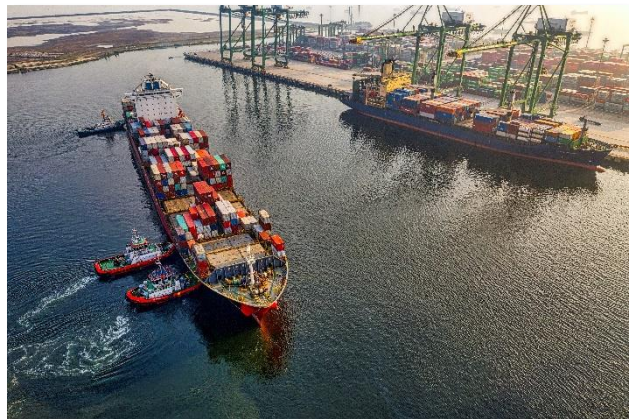
This year's annual national Cargo-owner survey is the third consecutive survey. We ask decision-makers from all over Norway about their perceptions of the different transport modes, decision processes, and barriers to moving cargo from road to sea. Following the survey, we have follow-up interviews with respondents of the survey. The survey provides the government, ports, and shipping lines with valuable insight into cargo owners' demand for transport.



- **Keynote speaker (selected venues)**

- Norwegian Ship-owners association seminar on Shortsea
- Norwegian Ports association seminar on communication
- Maritime Forums annual regional conference
- Norwegian Shipbrokers associations annual conference
- Board presentation to the Port of Arendal
- Board presentation to the Port of Stavanger

- Presentation to the Danish Ports Association (in connection with their discussions on establishing a Danish SPC)
- **Dialogue meetings with the industry and market**
 - Cargo owners, ports, and shipping lines to share experiences, promote Shortsea, and discuss opportunities and projects to make Shortsea more accessible.
 - Input meeting with the Norwegian
- **Conferences arranged by Shortsea Promotion Centre**
 - “Business Hub” at Nor-Shipping
 - “How Technology will affect the logistics sector going forward”
 - “The Port brings together the ecosystem.”
- **Projects**
 - **Shortsea Schedules 2.0** - Finalized and released version 2.0 of the popular digital route finder to make the customer journey easier for the cargo owner and represent an additional promotional and marketing channel for the maritime industry.
 - Project manager for the Communication strategy in “Emission-free Oslo fjord”
 - Reference group participant in the Norwegian Coastal Administration project “More Cargo by Sea”
 - Prosjektleder “Vi Bringer sammen” (arvtager Velg Sjøveien)
 - The Norwegian Coastal Administration - We participate in semi-annual meetings discussing shortsea.



Outlook 2023

- **Promotional activities**
 - Keynote speaker at main events concerning shortsea in Norway/Scandinavia
 - Content production in all channels
 - Market campaign for all Norwegian ports visualizing the port role.
 - Conference with Coastal ship-owners association
 - Technology and Sustainability Conference

- **Projects**
 - National cargo-owner Survey 2023
 - Logistics industry survey 2023

- **Dialogue meetings**
 - With the Norwegian government, members of the SPC, and cargo owners explore projects and opportunities to move more cargo from road to sea.

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Shortsea Promotion Centre Poland



Main actions 2022

- **January 2022**
 - SPC Poland was the host of traditional New Year's Meeting for 200 guests from the maritime sector attended this event.
- **May 2022**
 - SPC organized “Forum Shortsea Shipping 2022.”
 - SPC continued as main organizer of an annual “Herring Szczecin Meeting “gathering over 1600 representatives of seaborne industry from all over the world.

- **September 2022**

- Word Maritime Day - SPC organized and sponsored traditional



meeting (Dredging Świnoujście – Szczecin fairway to 12.5 m on its entire length) on board of the river boat for 100 participants where various presentation, speeches relating to shortsea, ports and

logistics were given.

SPC Poland was also active in the promotion of the SSS via local media as well as in supporting various initiatives and projects.

Outlook 2023

- Maintaining an active role of the SPC and encouraging its members to promote Short Sea Shipping
- Strengthening good relationships with other maritime organizations, ports, shipowners and logistic operators



- Securing financial support of SPC Poland
- Acquiring new members
- SPC Poland was also active in the promotion of the SSS via local media as well as in supporting various initiatives and projects.

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Shortsea Promotion Centre Romanian

Main actions 2022

Romanian Intermodal Association, as part of the European Shortsea Network is actively participating to the social dialogue, attracting the professional potential of the experts in supporting the Romanian state strategic decisions and promoting of an appropriate social climate for professional and economic activities.

In this respect, during 2022, Romanian Intermodal Association was selected as observer member of the **Monitoring Committee of the South-East Regional Program** which is a partnership-type structure with a strategic decision-making role in the implementation process of the Regional Program.

RIA experts provided expert opinion during all online and face to face meeting related to the achievement of the third policy objective of the 2021-2027

Regional Program: A more connected

Europe by

strengthening mobility. In doing so, RIA contribute to developing and strengthening national, regional and local sustainable, smart and intermodal mobility, resilient to climate change inclusive, as well as improving access to TEN-T and cross-border mobility.

On the 22nd of November 2022, Mr. Laurentiu Ivanov participated in the first meeting of the Monitoring Committee that took part at Braila. The opening speech was delivered by the representative in Romania of the European Committee. Among the subject, the experts discussed about real actions for reducing carbon emissions in the county municipalities and their metropolitan areas through investments for the development



of clean urban infrastructure (transport infrastructure, cycling, alternative fuels), based on sustainable urban mobility plans. Participants agreed on the Regulation of the Organization and Operation of the South-East Regional Program Monitoring Committee 2021-2027 that was presented to all members for analysis and approval.



Being aware of the need of digitalization of individuals, Romanian Intermodal Association invited professionals to exchange of good practices and expertise in the sectors of digital social education. In this context, RIA together with European organizations from Spain and Poland established an Erasmus consortium to support inclusive education and digital skills development, improving the competences of educators and volunteers.

Between 25-29 November 2022, delegates of the Romanian Intermodal Association took part in the "Stop Digital Divide" seminar in Valladolid, Spain. They shared the best practices and common understanding to design learning experiences using digital pedagogy to empower adult people to be active technology users.

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Shortsea Promotion Centre Spain



Main actions 2022

- **Annual Conference 20th Anniversary Shortsea-Madrid:** The Conference was held on November 24th and brought together an outstanding panel of speakers and a wide and qualified representation of companies and ports of reference in SSS in Spain. The welcome was conveyed by the President of SPC Spain, the Director General of the Merchant Marine, and the President of State Ports. **For more details see: [here](#).**



- Participation in **European Sustainable Shipping Forum** plenary and Subgroups meetings. SPC Spain is **member** of the ESSF plenary and takes part in some ESSF's Subgroups.
- **Promotional Activities:** Holding 4 workshops in different Spanish cities (Sevilla, Santander, Madrid, and Valencia), to promote maritime – land intermodality, focusing on the needs of shippers, logistic operators and road haulers. [Link](#).
 - [SPC SPAIN workshop in Seville](#): "*The Port of Seville: A Competitive, Innovative and Sustainable Transport Offer from the Peninsular Interior*".
 - [SPC SPAIN workshop in Santander](#): "*The Port of Santander: 150 years Promoting SSS*".

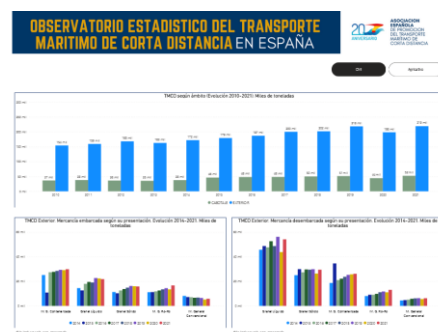


- SPC SPAIN workshop in Valencia: "*The Short Sea Shipping in the port of Valencia: A Competitive, Innovative and Environmentally Responsible Option*".
 - Weekly newsletter of SSS related news.
 - SPC Spain's presence in specialized media with articles and interviews.
 - Continuous website updating
- **Updating of TRANSPORT CHAINS SIMULATOR**



- **Knowledge & monitoring of the Short Sea Shipping activity:**

- SPC Spain launched two issues of the Spanish Shortsea Statistical Observatory in 2022: 2021 Annual Edition, and 2022 1st semester edition. Additionally, an interactive application of the Observatory has been included in the website. Available in the following link: [link](#).



- **Best Practice**

The Spanish Transport Ministry launched in July 2022 the **maritime Eco-incentive program** for the promotion of maritime freight transport. Its objective is to consolidate and increase the modal share of maritime freight transport, as well as to promote the improvement of its environmental and socio-economic performance and the shift from road to maritime transport with objective sustainability criteria. It has a budget of €60 million for the first three years (2022, 2023 and 2024).

The aids are granted to the user of the SSS services that obtain the status of eligible on a non-competitive basis.



Outlook 2023



- **Annual Shortsea Conference 2023.**
- **Eco-incentive program:** collaboration with the Transport Ministry to improve the program.
- **Promotional Activities:** workshops in different Spanish cities to promote SSS, focusing on the needs of shippers, logistic operators and road hauliers.
- Participation in **institutional forums:** Ports Observatory, ESSF, Chamber of Commerce Ports Committee, Intermodality Commission, Platform for the Promotion of Eco fuels, Port's Navigation Committees & Councils....
- During 2023, SPC Spain will launch, the customary two issues of the **Spanish Shortsea Statistical Observatory.**
- Cooperation with Ports of State to improve the Border Inspection Services.

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Shortsea Promotion Centre Turkey



Main actions 2022

SPC Turkey's secretarial duties have been undertaken by the Istanbul & Marmara, Aegean, Mediterranean, Black Sea Regions Chamber of Shipping (IMEAK Deniz Ticaret Odasi) as being the promotion Centre's secretariat.

Our Promotion Center operating under the Turkish Chamber of Shipping, within the framework of the requests from our members and the duties and responsibilities assigned to it by the relevant legislation, fully, accurately and timely; adheres to the principles of impartiality and reliability.

Best Practices:

In order to mitigate the negative effects of the Russian-Ukrainian War on the Turkish-owned maritime merchant fleet, work has been initiated by our Chamber and the relevant Ministries, primarily for the immediate implementation of all measures to ensure the safety of navigation, life, property and environment of the Turkish Owner/Operated ships stranded in the region.



Outlook 2023

Offering efficient, productive and affordable services for shipping activities which are compatible with global system with the purpose of developing Turkish Shipping Sector in a free competition environment, increasing



international competitive power of Turkish Shipping Sector and contributing to the national economy through our ever-developing service concept.

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2022



European Shortsea Network