



European Shortsea Network

2020–2021

Annual Report

European Shortsea Network



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Premise

This report intends to give an overview of the activities and progress of each SPC in the framework of the ESN. The national SSS promotion centers were created by the European Commission in 1999 in order to promote SSS in the member states. The year 2022 of the ESN will be presided by SPC Italy.

The main EU institutions have always had great considerations towards the strategic importance of Short Sea Shipping in the framework of the policies for the development of the infrastructural and logistics European network

The world is still recovering from the Covid 19 pandemic crisis, however, it is not the only challenge for the transport sector. The EU aims at becoming a carbon neutral economy by 2050, an ambition outlined in the **European Green Deal** and in its '**Sustainable and Smart Mobility Strategy**' and enshrined in the EU Climate Law.

The EU Green Deal and its goal of making Europe climate-neutral by 2050 - among other things by developing sustainable industry and sustainable transportation - will make **short sea shipping more important** and meaningful. This goal can only be reached if this form of transport, is given higher priority. The European Commission presented its 'Sustainable and Smart Mobility Strategy' together with an Action Plan of 82 initiatives that will guide our work for the next four years. This strategy lays the foundation for how the EU transport system can achieve its green and digital transformation and become more resilient to future crises. As outlined in the European Green Deal, the result will be a **90% cut in emissions by 2050**, delivered by a smart, competitive, safe, accessible and affordable transport system. All transport modes need to become more sustainable, with green alternatives widely available and the right **incentives** put in place to drive the transition. In order to give further aid in reaching the European Green Deal objectives and the climate targets of the EU Climate Law, cutting greenhouse gas emissions from the transport sector by 90%, compared with 1990 levels, by 2050, a fully-fledged European transport network is needed: (1) that makes all transport modes more sustainable by setting firm incentives and requirements for transport infrastructure development and by better integrating the different modes in a multimodal transport system, (2) that ensures that new infrastructure projects on the network are climate-proof and consistent with environmental objectives and (3) that delivers the infrastructure basis for alternative fuel deployment.

At the same time, the **ongoing TEN-T (Trans European Transport Network) revision** will reinforce the governance and monitoring instruments in place to ensure on-time network completion and exploit synergies between infrastructure planning and transport operations. This is particularly

important since SSS is part of the TEN-T and **Motorways of the Sea (now becoming part of the wider concept of European Maritime Space)** is a horizontal priority of the European Commission. This includes binding work plans to remove further obstacles for quicker and more efficient rail freight and passenger services.

The next decades will shape the future of Transport and Mobility of both people and goods. In this context, ESN supports the promotion of short sea shipping through numerous activities of the national SPCs, regular exchange of information with the relevant European institutions and businesses, elaboration of position papers and organization of virtual and physical seminars.

SSS in the framework of EU Policies

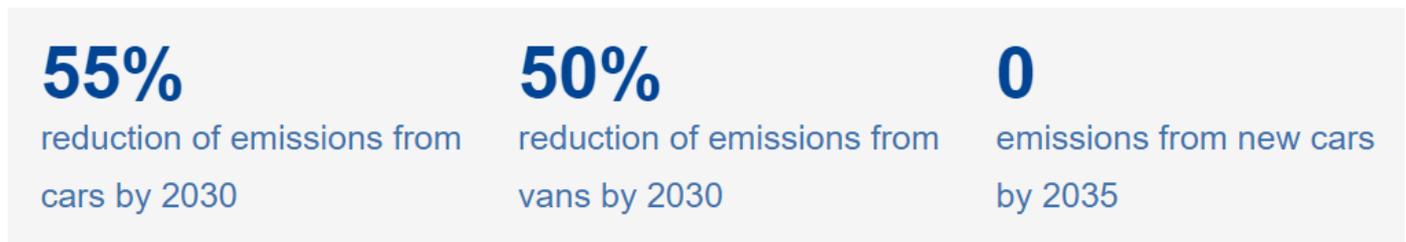


At the end of 2019, the EU adopted its ambitious European Green Deal and has started its implementation aiming to achieve carbon neutrality till 2050. Reaching this target will require action by all sectors of the EU economy, including:

- A roadmap for a sustainable EU economy: solutions for climate-related and environmental challenges in all policy fields.
- Europe is to become climate-neutral by 2050, requiring a complete conversion of energy supply, industry, transport, and agriculture.
- A new growth strategy for the EU: transformation into a modern, resource-efficient, and competitive economy.
- By 2050 there should be no net greenhouse gas emissions; and economic growth is to be decoupled from the consumption of resources.

The EU Green Deal provides a roadmap on how to move to a clean, circular economy and adapt to climate change, revert biodiversity loss and cut pollution. It outlines investments needed and financing tools available and explains how to ensure a just and inclusive transition to help those that are most affected by the move towards the green economy. The Green Deal covers all sectors of the economy, notably transport, energy, agriculture, buildings, and industries such as steel, cement, ICT, textiles and chemicals.

With reference to mobility, the European Commission proposes more ambitious targets for reducing the CO2 emissions of new cars and vans:



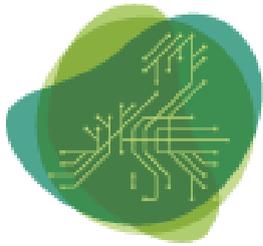
The Commission also promotes the growth of the market for zero- and low- emissions vehicles. In particular, it seeks to ensure that citizens have the infrastructure they need to charge these vehicles, for short and long journeys.

In addition, from 2026, road transport will be covered by emissions trading, putting a price on pollution, stimulating cleaner fuel use, and re-investing in clean technologies.

The Commission is also proposing carbon pricing for the aviation sector, which benefited from an exception until now. It is also proposing to promote sustainable aviation fuels – with an obligation for planes to take on sustainable blended fuels for all departures from EU airports.

To ensure a fair contribution from the maritime sector to the effort to decarbonize our economy, the Commission proposes to extend carbon pricing to this sector. The Commission will also set targets for major ports to serve vessels with onshore power, reducing the use of polluting fuels that also harm local air quality.

Soon after, on the 14th of January 2020, the "European Green Deal Investment Plan" and the "Just Transition Mechanism" were introduced. It will take a huge effort to make the considerable investments that will be necessary to turn Europe into the first climate neutral economic region in the world by 2050. The investment plan for the European Green Deal will mobilize both public and private investments, the latter via the set-up of EU financial instruments (e.g. InvestEU) which shall leverage private funding of at least one trillion EUR.



SUSTAINABLE & SMART MOBILITY STRATEGY

The European Commission presented its “Sustainable and Smart Mobility Strategy” together with an Action Plan of 82 initiatives that will guide the work up to 2024. This strategy lays the foundation for how the EU transport system can achieve its green and digital transformation and become more resilient to future crises. As outlined in the European Green Deal, the result will be a 90% cut in emissions by 2050, delivered by a smart, competitive, safe, accessible, and affordable transport system.

All transport modes need to become more sustainable, with green alternatives widely available and the right incentives put in place to drive the transition. Concrete milestones will keep the European transport system’s journey towards a smart and sustainable future on track:

By 2030:

- at least 30 million zero-emission cars will be in operation on European roads
- 100 European cities will be climate neutral.
- high-speed rail traffic will double across Europe
- scheduled collective travel for journeys under 500 km should be carbon neutral
- automated mobility will be deployed at large scale
- zero-emission marine vessels will be market-ready

By 2035:

- zero-emission large aircraft will be market-ready

By 2050:

- nearly all cars, vans, buses as well as new heavy-duty vehicles will be zero-emission.
- rail freight traffic will double.
- a fully operational, multimodal Trans-European Transport Network (TEN-T) for sustainable and smart transport with high speed connectivity.

10 key areas for action to make the vision a reality

To make our goals a reality, the strategy identifies a total of 82 initiatives in 10 key areas for action (“flagships”), each with concrete measures.

Sustainable

For transport to become sustainable, in practice this means:

1. Boosting the uptake of **zero-emission vehicles, vessels and aero planes, renewable & low-carbon fuels** and related infrastructure - for instance by installing 3 million public charging points by 2030.
2. Creating **zero-emission airports and ports** – for instance through new initiatives to promote sustainable aviation and maritime fuels.
3. Making **interurban and urban mobility healthy and sustainable** - for instance by doubling high-speed rail traffic and developing extra cycling infrastructure over the next 10 years.
4. **Greening freight transport** – for instance by doubling rail freight traffic by 2050.
5. **Pricing carbon and providing better incentives for users** – for instance by pursuing a comprehensive set of measures to deliver fair and efficient pricing across all transport.

Smart

Innovation and digitalization will shape how passengers and freight move around in the future if the right conditions are put in place. The strategy foresees:

1. Making **connected and automated multimodal mobility** a reality – for instance by making it possible for passengers to buy tickets for multimodal journeys and freight to seamlessly switch between transport modes.
2. Boosting **innovation and the use of data and artificial intelligence (AI)** for smarter mobility – for instance by fully supporting the deployment of drones and unmanned aircraft and further actions to build a European Common Mobility Data Space.

Resilient

Transport has been one of the sectors hit hardest by the COVID-19 pandemic, and many businesses in the sector are seeing immense operational and financial difficulties. The Commission therefore commits to:

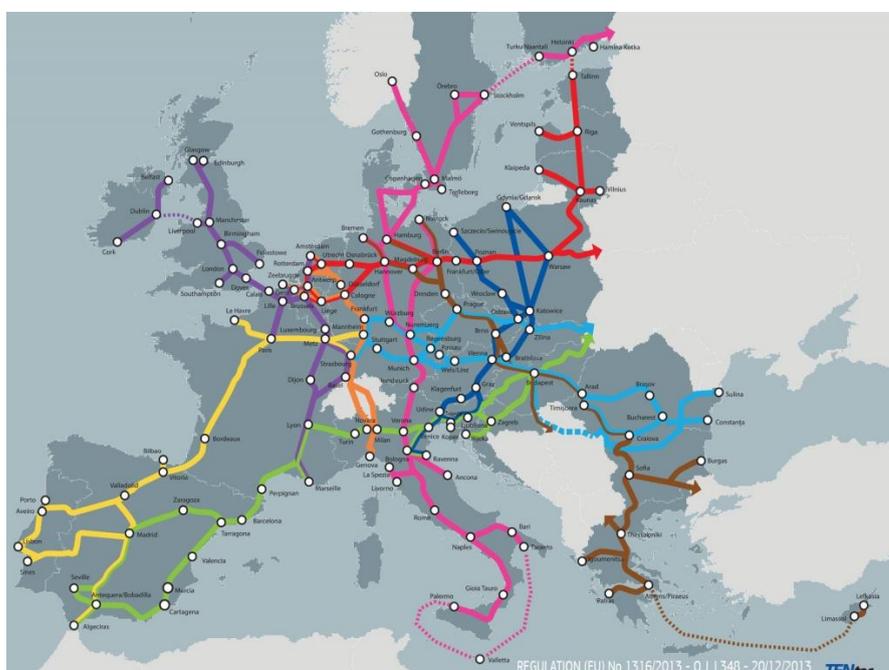
1. **Reinforce the Single Market** - for instance through reinforcing efforts and investments to complete the Trans-European Transport Network (TEN-T) by 2030 and support the sector to build back better through increased investments, both public and private, in the modernisation of fleets in all modes.
2. Make **mobility fair and just for all** – for instance by making the new mobility affordable and accessible in all regions and for all passengers including those with reduced mobility and making the sector more attractive for workers.

- 3. Step up **transport safety and security** across all modes - including by bringing the death toll close to zero by 2050.



The EU's Trans-European Transport Network (TEN-T) policy aims at building an effective, EU-wide and multimodal transport network across the EU. It comprises railways, inland waterways, short sea shipping routes and roads linked to cities, maritime and inland ports, airports and terminals. TEN-T policy does so by identifying the transport infrastructure in Member States that has high added value at the European level and that should be part of the TEN-T network. TEN-T policy also sets requirements that this infrastructure must comply with, including on safety, quality for highly performing transport and alignment with environmental objectives.

The TEN-T is an EU-wide network of rail, inland waterways, short-sea shipping routes, and roads. It connects 424 major cities with ports, airports and railway terminals. When the TEN-T is complete, it will cut travel times between these cities. For example, passengers will be able to travel between Copenhagen and Hamburg in 2.5 hours by train, instead of the 4.5 hours required today.



The policy is a key instrument for the development of coherent, connected and high-quality transport infrastructure across the EU. It incentivizes the sustainable and more efficient transportation of people and goods, ensures access to jobs and services, and enables trade and economic growth. It also strengthens the EU's economic, social and territorial cohesion by creating seamless transport systems across borders, without missing links and bottlenecks.

A revision of the TEN-T regulation has been deemed necessary in order to make the Trans-European Transport Network fit for the future, and to align the development of the TEN-T network to the European Green Deal objectives and the climate targets of the EU Climate Law. Cutting greenhouse gas emissions from the transport sector by 90%, compared with 1990 levels, by 2050, is key to achieving climate-neutrality by the same date.

To make such significant emission cuts, we need a modern, fully-fledged European transport network (1) that makes all transport modes more sustainable by setting firm incentives and requirements for transport infrastructure development and by better integrating the different modes in a multimodal transport system, (2) that ensures that new infrastructure projects on the network are climate-proof and consistent with environmental objectives and (3) that delivers the infrastructure basis for alternative fuel deployment.

At the same time, the TEN-T revision will reinforce the governance and monitoring instruments in place to ensure on-time network completion and exploit synergies between infrastructure planning and transport operations. This includes binding work plans to remove further obstacles for quicker and more efficient rail freight and passenger services.

The TEN-T Regulation supports the development of a reliable and seamless trans-European transport network that offers sustainable connectivity throughout the European Union, without physical gaps, bottlenecks or missing links.

This high-quality network shall be gradually completed in three steps: 2030 for the core network, 2040 for the extended core network and 2050 for the comprehensive network. The core and extended core network together form the European Transport Corridors which are the most strategic part of the network with highest EU added value.

The main novelties compared to the 2013 Regulation are:

- High infrastructure standards for all modes applied throughout the entire network.
- Nine 'European Transport Corridors', representing the main arteries of EU transport, that integrate the former Core Network Corridors with the Rail Freight Corridors.
- Stronger synergies between infrastructure planning and the operation of transport services. Examples include higher speeds for train services across the TEN-T network (160 kilometers per hour for passenger services and 100 kilometers per hour for freight), maximum waiting times at borders of 15 minutes for rail freight. Another example is guaranteed good navigation status per river basin on the inland waterways on the TEN-T network.
- Requirements for the deployment, across the TEN-T network of the charging and refueling infrastructure needed for alternative transport fuels in line with the Alternative Fuels Infrastructure Regulation. This would mean sufficient charging capacity for cars, vans and trucks at 60 kilometers

distance in each direction by 2025 on the core network and by 2030 for the extended core and comprehensive networks.

- Providing safe and secure parking areas for commercial drivers, equipped with alternative fuels infrastructure.
- Use of innovative technologies like 5G to further advance the digitalization of transport infrastructure, further increasing efficiency, and improving the safety, security and resilience of the network.
- Increased resilience of the TEN-T network to natural and human-made disasters via climate-proofing requirements and environmental impact assessments for new projects, and to the implications of an accident or breakdown (e.g. by enabling alternative route alignments to the main network).
- The requirement for 424 major cities (“cities”) on the TEN-T network to have sustainable urban mobility plans by 2025, in order to align their mobility developments on the TEN-T network. The SUMP’s will contain measures such as the promotion of zero-emission mobility and the greening of the urban fleet.
- More transshipment hubs and multimodal passenger terminals in cities to facilitate multimodality, in particular for the last mile of a passenger or freight journey.
- Connect large airports to rail, where possible high-speed rail.
- Making it possible network-wide for lorries to be transported by trains.

Following the general strategies outlined by the European Commission, and the ongoing revision of the TEN-T, Coordinator for the Motorways of the Sea Prof. Kurt Bodewig in its revision of the “Motorways of the Sea Detailed Implementation plan” outlined a series of recommendations for the European Maritime Space:

Green the fleet: Most emissions from the maritime sector come from vessels. As such, it is fundamental that we invest in pilot projects to develop new types of propulsion systems, and new types of ships that can achieve low to zero emissions.

Deploy the infrastructure: In line with the Alternative Fuel Infrastructure Directive (and the proposal for a new Regulation), it is crucial that we provide funds to deploy alternative fuel infrastructure across European ports, both core and comprehensive, in order to enable the deployment of low to zero emission vessels.

Multi-modality: The highest benefit SSS can bring is by enabling the modal shift of freight from road to sea. Making connections seamless and numerous will ensure that sustainable transport solutions can reach their full potential.

Green the ports: Another side of the coin is the greening of ports. If vessels generate the biggest part of emissions (through the fuels they use), ports are at the forefront of maritime transport, and the most visible part. To limit pollution in cities, it is important that we invest in renewable energies and nature-based solutions to ensure that ports are well integrated in the urban landscape.

Foster connectivity: At the heart of the MoS programme is the idea of fostering connectivity between European Member States. As such, investment should be targeted towards enhancing links between core ports and the CNCs, as well as peripheral and outermost regions and neighbourhood countries.

Digital data exchange: Digital tools can bring many benefits to the maritime industry, including reducing the administrative burden for ship operators. To facilitate the exchange of data between operators and authorities, it is important to develop standard exchange of information solutions.

Sea and vessel traffic: Looking forward, digital tools, namely machine learning and data analytics have a strong role to play in optimising processes, including sea and vessel traffic. Such use of data can reduce emissions and increase safety by selecting the best route or allow for more efficient processes in ports. It is thus crucial to support the development of such tools that can make the maritime sector truly seamless.

Resilience plans: It is crucial that we allocate funds to establish resilience plans, to increase preparedness in the face of the unexpected in light of the COVID-19 pandemic, and the emergence of exogenous shocks with global impacts. Similarly, putting in place emergency routing solutions will ensure goods can continue to flow despite external shocks.

Climate adaptation: The negative impacts of climate change are expected to become more and more prominent in today's world. Maritime infrastructure, especially in peripheral and outermost regions, is particularly exposed to worsening meteorological conditions. It is important to deploy infrastructure that is designed to face such conditions.

Conclusions

It has become clear that SSS will have a crucial role in facing the above mentioned challenges of the transport sector in the upcoming years. In particular, the 2021-2027 period will be of great importance. The ESN can and will give its contribution through the **elaboration of papers** which will be based on the feedback of a vast network of stakeholders and through the **organization of important webinars and physical events** on important issues such as digitalization, sustainability, connectivity and resilience of the transport sector.

In this spirit the ESN Intend to revitalize the discussions on the future of SSS in order to outline its role in the framework of the challenges that the transport sector needs to face in order to comply with the numerous requirements of the Green Deal and of the European Commissions' Sustainable and smart Mobility while maintaining its competitiveness.

CROATIA



Main actions 2020- 2021

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

Project 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 will develop 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.

Project MultiAPPRO PLUS



MultiAPPRO PLUS (Multidisciplinary approach and solutions to development of intermodal transport in region – PLUS) is a project funded by the transnational cooperation programme Interreg ADRIION, whose partnership spans across five countries – Greece, Italy, Montenegro, Albania and Croatia. The project is a continuation of the MultiAPPRO project, in which Intermodal Transport Cluster was, and remains the lead partner. The project is set for the first half of 2022, and will aim to promote freight transport logistics, strive to make intermodal transport more competitive and put maritime freight transport on equal footing with other transport modes as well as continue the creation of frameworks that incentivize investments for the modernization of ports in the Adriatic-Ionian region and continue reviewing the progress made in the development of sustainable mobility as previously proposed by the European Commission.

Programme and Project initiatives

Intermodal Transport Cluster remains an active partner on 8 EU projects funded by different cross-border and transnational programmes.



Outlook 2022

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 about intermodality and shortsea shipping, publishing articles about best practices and EU projects in implementation.

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Main actions 2020-2021

Cyprus Shortsea Promotion Centre (CSPC) is established by the Cyprus Port Authority (CPA) and currently operating under CPA. CPA decided to transfer CSPC under the Cyprus Marine and Maritime Institute (CMMI), www.cmmi.blue, so as for CMMI to undertake the role of administrative and scientific support of the Centre.

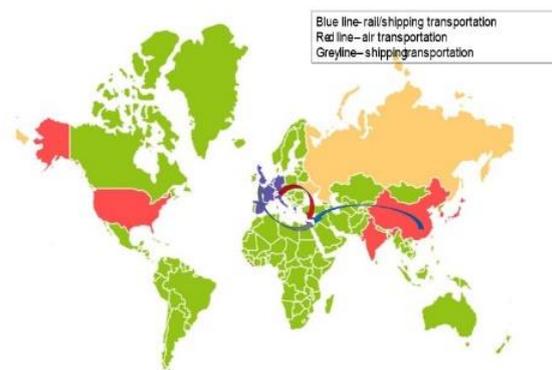
CMMI was established in April 2019, and it is a Centre of Excellence for marine and maritime research, innovation and technology development. CMMI's vision is to drive sustainable Blue Growth by addressing the needs of industry and society within the spectrum of the marine and maritime sectors. It has ten Research and Innovation Centres that are involved in marine observation, marine robotics, maritime digitalisation, maritime engineering, marine and coastal ecosystems, the maritime human element, marine cultural heritage, marine and maritime policies and regional cooperation and underwater and seabed technologies.



Outlook 2022

Plans for 2022-23 include:

- Assessment of the *Fit for 55 legislation package* on the Cypriot economy taking into consideration the provisions that are affecting the shipping industry and the maritime transportation
- Evaluation of the intermodal transportation impact on the environment by calculating the CO₂ emission
- Provision of VET programs to address the needs of shipping that are related to personnel's upskilling and reskilling



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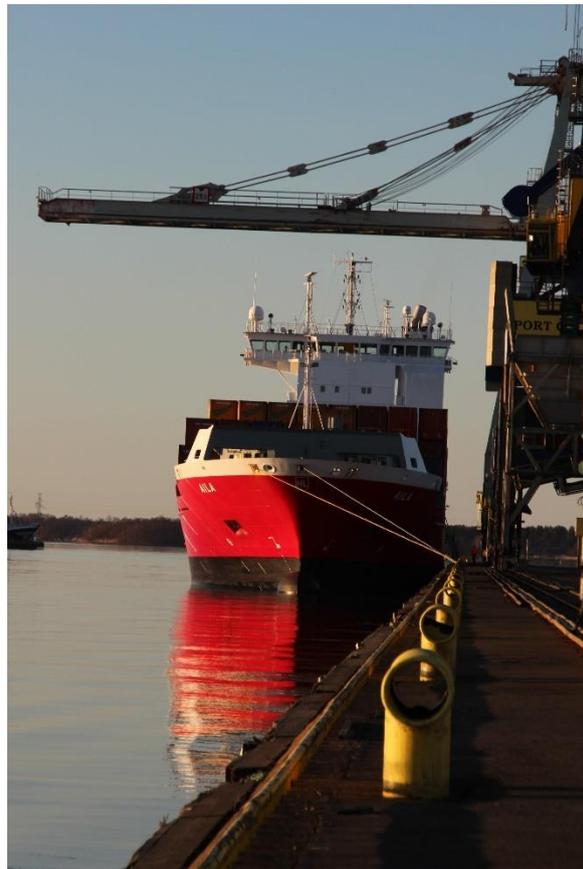
Tel: +357 24 506100

e-mail: zacharias.siokouros@cmmi.blue



Main actions 2020-2021

SPC Finland's main publication is the annual Shipping Company Barometer. The latest barometer was published in January 2022. 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 and financed by the Finnish Transport and Communications Agency Traficom, Finnish Shipowners' Association and Government of Åland.



Recent projects

CSHIPP - Clean Shipping Project Platform was financed by Interreg BSR in 2019-2021. CSHIPP focused on the environmental effects of shipping and the business potential of clean shipping in the Baltic Sea Region. Various channels were used in dissemination of synthesized clean shipping data. The platform consisted of projects and organisations which focus on enhancing and promoting clean shipping in the Baltic Sea region. The results, including reports, infographics and story map are available at <https://cshipp.eu/>

SEAMEASURES Seed Money project focused on the decarbonization of the Baltic Sea and the North Sea shipping, financed by Interreg BSR in 2020-2021.

Outlook 2022

Implementation and participation in clean shipping related projects

Shortsea shipping in the context of sustainable Blue Economy

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Current Situation in short sea shipping and inland navigation in Germany 2020 - 2021

In 2020, 165.6 million tonnes (excluding tare weights of carriers) were handled in short sea shipping in the German seaports. This corresponded to around 60.1 percent of the total cargo handled. This corresponds to a decrease of 8.4% compared to 2019 and results from the impact of the Corona pandemic. Short sea shipping thus continues to be very important for the German seaports. The network of federal waterways in Germany comprises approximately 7,300 kilometres of inland waterways, of which approximately 75 percent are rivers and 25 percent are canals. The federal waterways also include approximately 23,000 square kilometres of sea waterways. In addition to the seaports, there are a high number of inland ports and transshipment terminals in combined transport. In 2021, inland waterway transport in Germany carried 3.8 % more goods than in the previous year. As reported by the Federal Statistical Office (Destatis), a total of 195 million tonnes of goods were transported on German inland waterways. In 2020, the volume of goods transported had amounted to 188 million tonnes. Despite the year-on-year increase, the volume of goods transported in 2021 was 4.9 % lower than in the pre-Corona year 2019, when inland waterway freight transport was still 205 million tonnes. The freight transport performance of the three land transport modes of truck, rail and inland waterways fell by 3.7 % to 653.5 billion tonne-kilometres in 2020 compared to 2019, a year marked by the Corona pandemic. As the Federal Statistical Office (Destatis) further reports, around a quarter (25.4%) of freight transport performance in 2020 was accounted for by rail (18.3%) and inland waterways (7.1%). Around three quarters (74.6%) of the freight transport performance was achieved by truck, namely about 487.4 billion tonne-kilometres.

Activities of SPC Germany

01.07.2020 – 31.12.2020 Chairmanship of European Shortsea Network (ESN).



Marketing

Due to the Corona pandemic, almost all marketing activities, especially the face-to-face events, were converted to digital formats. A series of digital professional events dealt with the topics of:

- Brexit
- Effects of climate change on waterways
- Partnership of rail and waterways
- Importance of the Silk Road for short sea and inland waterway transports
- How equipment makes the shift of traffic possible
- An authentic look at sustainability in the transport sector

Studies

- *Commissioning of and collaboration on a study on the development of the container and ro-ro markets in short sea shipping using the example of the North Range and Southern Baltic Sea Ports.*
 - Results: Container traffic with European correspondent regions accounted for 33% of container throughput at German seaports in 2020. In the hub ports, part of the intercontinental container traffic - namely the share attributable to transshipment traffic - is also dependent on this intra-European traffic. If these transports are included, more than half of the container throughput of the German seaports is dependent on intra-European maritime transport. The German ports are leading in Northern Europe with a ro-ro handling of 27.4 million tonnes of cargo in 2020. The ports are of outstanding importance, especially for the connection between Scandinavia and the Central European continent. After a long period of weak growth, recent figures point to a noticeable upturn in demand in 2021.

- *Support and participation in the Federal Ministry of Transport's working group "Shifting High and Heavy Goods Transports from Road to Waterway and Rail".*
 - Results: Final report of the working group "Shifting of High and Heavy Goods Transports from road to Waterway and Rail" with proposals for
 - Optimisation of the authorisation procedure
 - Financial incentives for those involved in high and heavy transports
 - Increasing the attractiveness of a shift (infrastructure/ information offer)

Outlook 2022:

Continuation and intensification of the core activities of spc Germany in the areas of promotion, counselling, information, training and securing skilled labour. The highlight will be the 4th ShortSeaShipping Days on the 07 and 08 September 2022 in Luebeck.

Contact:

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Shortsea Promotion Centre Greece



Main Actions 2020-2021

Undertaking of the ESN Permanent Secretariat.

Continued involvement in LNG bunkering project POSEIDON MED II.

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.

Outlook 2022

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.

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IRISH MARITIME DEVELOPMENT OFFICE (IMDO)



Main actions 2020-2021

The IMDO continues to promote the opportunities that exist in Ireland's maritime industry, specifically in sectors such as shipping, port services, Offshore Renewable Energy (ORE), education and maritime commerce. Ireland's heavy reliance on international trade means that maritime transport is of significant interest to most industry sectors, drawing the IMDO into diverse, yet related sectors of the Irish economy. The IMDO's business development activity in the year under review was heavily influenced by Covid-19 travel restrictions and saw much of our business development activity take place online.

During 2021, the IMDO participated in a number of international events and conferences. Where possible, the collaboration of other development agencies was sought to strengthen the impact of Ireland's presence at these events. The growing emphasis on Offshore Renewable Energy (ORE) resulted in the IMDO participating in 11 events during the year.

Responding to opportunities created by the UK's decision to leave the European Union, the IMDO intensified its business development activities in the shipping sector and responded to a growing number of enquiries in relation to the Irish shipping market. In doing so, the IMDO has heightened awareness of the changing demand profile in the industry and provided the information needed to inform invest decisions.

The results of these efforts are apparent in the number of shipping companies that have established new services or expanded existing services over the past two years. These developments took place in the Roll-on/Roll-off and the Lift-on/Lift-off markets and had the effect of offering Irish importers and exporters more choice and more capacity than ever before.

In all, the IMDO participated in some 29 international events and 28 national events in 2021 with industry stakeholders and policy makers related to business development opportunities. Although the events were all virtual, their effectiveness was greatly enhanced by the increased familiarity that

now exists in relation to hosting such events and in relation to enhancing audience engagement through the use of technology.

General Activities

The growing emphasis on Offshore Renewable Energy (ORE) resulted in the IMDO participating in 11 events during 2021, which presented learning opportunities and formed part of the ORE consultation exercise undertaken at the request of the Department of Transport (DoT).

This interest in ORE also resulted in the IMDO's involvement in a conference partnered with the Dutch Embassy. It drew the attention of Dutch investors and showcased the ORE opportunities that will arise in Ireland in the coming decades. The conference, which was opened by the Minister for Transport, Eamonn Ryan TD, also served to underline the determination of the Irish Government to develop a successful ORE industry in Ireland, not only to meet national demand, but also to export renewable energy into the European market.

In 2021 Liam Lacey and the IMDO were nominated as Pillar Coordinators for Pillar 1 of the Atlantic Strategy "Ports as Gateways and Hubs for the Blue Economy". The IMDO kicked off 2021 by conducting a series of consultations with potential stakeholders to understand the key interests and challenges faced

To kick off their term, the IMDO conducted a series of consultations with potential stakeholders to gain a greater understanding of the key areas of interest, which formed the foundations of the Pillar 1 roadmap. From this, four key areas of interest were identified. These issues were further explored in a series of engaging workshops. This culminated in a joint workshop organized by the IMDO and AspBAN, which took place as part of the 8th Atlantic Stakeholder Conference, in Dublin on the 21st of October.

Looking forward to 2022, Mr. Lacey and the IMDO have been asked to extend their time as Pillar coordinators until June 2022. In this time, Pillar 1 will be exploring the socio-economic perspective, examining issues such as best practices from the Atlantic and beyond allowing for socio-economic impact to be optimized, port preparedness and how business models can best build in social resilience and uptake of the blue transition.

The IMDO has been undertaking a number of important studies in 2021/2022, these include:

- “Port Capacity Study” - consultancy team are working on this study to assess the capacity of Ireland’s ports network. This study will be published in 2022.
- The IMDO will launch the 19th volume of the "Irish Maritime Transport Economist" in April 2022 which provides valuable time series tracking the development and performance of Ireland’s ports and shipping services.

Focus 2022

Connectivity with Europe: The IMDO is working with Irish ports and shipping companies on the development of links between Ireland and Continental Europe in an effort to deal with the expected consequences of Brexit and any negative impacts on Ireland's access to the single market.

Offshore Renewable Energy will remain a key focus for the IMDO in 2022

AspBAN - Atlantic Smart Ports Blue Acceleration Network: The Atlantic Smart Ports Blue Acceleration Network (AspBAN) is the establishment of a partnership between EU Atlantic ports for the development of a blue accelerator scheme that can stimulate innovative businesses in an innovation ecosystem to foster a sustainable blue economy. AspBAN is funded by the European Maritime and Fisheries Fund (EMFF) of the European Union and will be based on the successful experience of Bluetech Accelerator – Ports & Shipping 4.0 in Portugal.

The project as the main goal to achieve a final pool of 30 innovative startup solutions developed as pilots in 30 Atlantic ports, attracting 6M€ in direct private investment, mobilizing 4,5billion€ of potential private investment and making a reduction of at least 100.000 tons of CO2 emissions in the operations of the 30 ports.

The IMDO represents the Irish Maritime industry in the AspBAN consortium and completed a research study into the innovation activities in Atlantic ports.

EALING - European flagship Action for coLd ironING in ports: The IMDO is a partner Motorways of the Sea project titled “European flagship Action for coLd ironING in ports “ (EALING). The IMDO will be undertaking technical studies aimed at identifying the locations and requirements for OPS in Irish ports and developing high level designs & costs for the systems that could be deployed. The EALING consortium has 22 partners from across Europe that represent the maritime community with Port Authorities, consulting companies in power system, energy and engineering, logistics, research and development bodies, IT suppliers. The project aims to provide a common EU harmonised and

interoperable framework for the transition to electrification and ultimately accelerate the effective deployment of OPS solutions in the EU maritime ports.

INTERNATIONAL FAST AND SECURE TRADE LANE (IFSTL) - Motorways of the Sea project: The IMDO are coordinating a Motorways of the Sea project that aims to improve the overall connectivity between Ireland and continental Europe, providing ports, shipping lines and logistic chain actors with a set of effective tools to overcome inefficiency, drive competitiveness and reduce costs.

In this framework, the overarching aim is the implementation of the INTERNATIONAL FAST AND SECURE TRADE LANE (IFSTL) approach, a trade facilitation initiative in the form of a set of harmonised and interoperable tools (business process modelling, software solutions, operational guidelines and governance models) on Motorways of the Sea routes connecting Ireland with France, the UK and other European countries.

The IFSTL project has five distinct phases that involve:

1. The articulation of the AS IS scenario
2. The articulation of a desired future scenario
3. The identification of digital solutions
4. The validation of the digital solutions
5. Implementation

Under the guidance of our chosen consultants, Circle SpA, phases 1 and 2 have been completed and the project is now moving into the third phase, in which digital solutions will be tested and validated by our project partners, Dublin Port and the Port of Cherbourg.

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SPC ITALY

Main actions 2020-2021

Support the implementation of the National Strategic Plan for Ports and Logistics.

Support to the Italian Ministry of Sustainable Infrastructures and Mobility in the implementation of Directive 2014/89/EU of the European Parliament and of the Council of 23 July 2014 establishing a framework for maritime spatial planning.

Contribution to the review of Motorways of the Sea Detailed Implementation Plan (DIP MoS) of the new 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 in international events related to SSS and MoS such as:

- the Munich fair (Transport Logistics 2021).
- the Core Network Corridors Fora.
- the event “Smart and sustainable strategies, linking Motorways of the Sea with the Orient – East Med & Baltic Adriatic corridors in the East Mediterranean Sea” organized by the three European Coordinators, Kurt Bodewig (MoS) Mathieu Grosch (Orient–East Med) and Anne Elizabet Jensen (Baltic-Adriatic) (22/02/2021).
- The seminar “From nodes to smart networks: connecting transport infrastructures and services in the Adriatic Ionian Region. EUSAIR: challenges, strategies, solutions” held by the Friuli Venezia Giulia Region in the framework of Pillar 2 “Connecting the region” of the EUSAIR macroregional strategy (17/03/2021).
- Participation to the 5th and 6th annual EUSAIR forums respectively in Belgrade (28-29/01/2021) and Izola (11-12/05/2021).
- the "Motorways of the Sea Digital Forum" (26/11/2021).

- INTESA project National event “Improving Maritime Transport Efficiency and Safety in the Adriatic” jointly with the EUREKA project “Harmonized and modernized maritime safety services in the Adriatic and Ionian seas” (16/12/2021).

Participation to EU projects on SSS: INTESA, PROMARES, ADRIUP

Best Practices

RAM/SPC Italy, acting as implementing body of the Italian Ministry of Sustainable Infrastructures and Mobility, has developed and is currently managing, the 2 national incentive schemes for sustainable multimodal transport Marebonus and Ferrobonus:

- The Ferrobonus incentive scheme is aimed at sustaining combined rail freight transport funding interventions in favor of combined rail freight transport and transshipment as well as investments for road transport companies looking to lower their environmental impact and improve the development of logistics.
- The Marebonus incentive aimed to develop three-year projects for the development of Ro-Ro and ro-Pax new maritime services, by means of registered ships for freight multimodal transport. It is currently being revised following the experience of the Med Atlantic Ecobonus project.

In the framework of the Med Atlantic Ecobonus (MAE) project, co-financed by the Connecting Europe Facility Program (CEF 2014 - 2020) and promoted by the transport ministries of Italy, Spain, France and Portugal, a proposal of an EU eco-incentive scheme for maritime - road combined transport was formulated. Following this proposal Italy and Spain are currently investigating with DG COMP the possibility of creating an eco-incentive scheme based on the results of the MAE project in order to incentivize maritime multimodal transport and help member states reach the ambitious goals of the Green Deal.

Focus 2022

- Initiative promoted in the framework of the Italian Presidency ESN 2022:
- Organization of 2 webinars dedicated to the promotion of SSS: ***“Digitalization and environmental sustainability as drivers in the change of SSS”*** and ***“The importance of eco-incentives for the SSS and the maritime sector including the necessity to revise the current guidelines on state aid in the maritime sector”***.

- Participation of the ESN to the Italian SSS days “*Naples Shipping Week*” and organization of the workshop “*SSS 2027 - Challenges and opportunities*”.
- Elaboration of the position paper elaborated by the ESN on the basis of the outputs and operation conclusion of the 2 webinars.
- Scouting of funding options for SSS projects in the 2021 - 2027 MFF and of new possible projects to participate in.
- Revision of the MoS DIP.
- Participation to the consultation process for the ongoing revision of the TEN-T network.
- Participation to Maritime Spatial Planning (MSP) Activities and events.
- Updating of the ESN website in close cooperation with all SPCs.
- Support to the deployment of new eco-incentive schemes for multimodal rail (Ferrobonus) and maritime (Ecobonus) transport.



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Main Actions 2020-2021:

After the amalgamation with the Malta Maritime Forum, the Malta Shortsea Promotion Centre (MSPC) continued contributing to the consultations with the Government in the development of public policies that can have a bearing on the Maltese maritime industry.

The Malta Maritime Forum is a very active body representing the various players of the Malta maritime industry and thus allows to have a more visible presence also on shortsea related issues and at the same time facilitate its administration.

Best practice:

- The Malta Maritime Forum has a Board of Directors which is overseen by the Chairman. The day-to-day administration and management of the Forum is entrusted to the Management Committee consisting of the CEO and the Executive Secretary allowing swift response, focus and flexibility. The Board of Directors together with the Management Committee meets on a monthly basis;
- Malta continued to follow up on the process of establishing ESN as a legal entity under Malteselaw and regularly provides information as requested by the local authorities;
- Through the MMF information is regularly provided to its members through its quarterly newsletters, the MMF website and the LinkedIn page which are regularly updated with news on the latest activities and developments;
- Review of local practices that hinder or obstruct the free movement of seaborne cargo on Malta continued.

Program and Project Initiatives/Participation

- Facilitating and promoting awareness amongst the Maltese transport community in the facilities and opportunities offered by the European Shortsea Network
- Opportunities, through appropriate EU funds, for Maltese interested parties, e.g. shipowners, trailer operators, services providers.
- Giving input and feedback on policies that influence the maritime industry on a local and EU level
- SPC Malta attended and participated in various conferences, seminars and workshops on shortsea shipping both locally and abroad.

Focus 2022

- SPC Malta will continue the process of revamping its image following its transition within the Malta Maritime Forum. This would include its online presence.
- Continue promoting short sea shipping vis-a-vis the policy makers
- Give advice on shortsea shipping policy
- Act as contact point for European Union programmes and funding related to shortsea shipping

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SPC Malta under the Malta Maritime Forum

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Main Actions 2020-2021

Content production

- Web, social media, monthly newsletter
- Articles to general press and interest organizations

Cargo-owner survey

- 93 Cargo-owners responded to the survey, in addition, several respondents has participated in follow-up interviews. The survey (the second year it is produced) provides us with great insight into decision processes, barriers to move cargo from road to sea, and perception of the different transport modes

Keynote speaker

- Port Conference in Kristiansand, Norwegian trade organization, professional seminar for the Norwegian Ports association. In addition, Keynote speaker at 10-15 webinars

Dialogue meetings with

- Cargo-owners, ports, shipping lines to share experience, promote shortsea, discuss opportunities and projects to make Shortsea more accessible.
- Input meeting with the Norwegian Customs department discussing potential improvements in border crossings via shortsea

Seminar

- Topic: What is the future role of the port
- Seminar divided into three parts dealing with drivers such as market, technology, regulatory forces, and planning processes)

Projects

- Shortsea Schedules 2.0 - 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

- The Norwegian Coastal Administration - participate in semi-annual meetings discussing shortsea. Promotional channel for grants provided to support new shortsea services
- Logo and branding project for Shortsea Promotion Centre and Shortsea Schedules



Focus 2022

Promotional activities

- Keynote speaker at main events concerning shortsea in Norway/Scandinavia
- Content production expanding reach and followers - increase impact and knowledge of shortsea
- Business HUB at Nor-Shipping
- Business HUB with major European port
- Seminar “Future role of the port”

Projects

- Release of shortsea schedules 2.0 <https://www.shortseaschedules.com/>
- Pilot Project with the Norwegian customs department
- National cargo-owner survey 2022

Dialogue meetings

- With SPC members (ports/shipping lines/forwarders/technology providers) and non-members, cargo-owners explore projects and opportunities to move more cargo from road to sea

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SPC POLAND



Main Actions 2020-2021:

January 2020

- SPC Poland was the host of traditional New Year's Meeting for 200 guests from the maritime sector attended this event,

September 2020

- World Maritime Day - SPC organized and sponsored traditional meeting (World & Maritime Economy A.D.2020) on board of the river boat for 100 participants where various presentation, speeches relating to shortsea, ports and logistics were given

September 2021

- World Maritime Day - SPC organized and sponsored traditional meeting (Wind Offshore – Good times for Szczecin and Region) on board of the river boat for 100 participants where various presentation, speeches relating to shortsea, ports and logistics were given.

Outlook 2022

- 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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Main Actions 2020-2021

Conference INTERMODAL 2020

The Agency's annual conference took place on the 14th of September, within the scope of the "Porto Maritime Week", an initiative of the magazine "Transportes & Negócios". This session, under the theme "Intermodal 2020", took place in a mixed format, in person, in Porto, and by videoconference, for the whole world.



After the opening, there was a debate on the theme "The integration of SSS in logistics chains: opportunities and constraints". The session ended with a speech by Jaime Vieira dos Santos, President of the Port Community of Leixões.

Workshop "Intermodality in the port of Viana do Castelo"

This event took place in the port of Viana do Castelo, on the 23rd of January, with the presence of more than 70 participants.

In a partnership with "Transportes & Negócios" and starting a cycle of workshops to be held in the main ports of the continent, the Agency held, in the afternoon, the first event of this type, under the theme "Intermodality in the port of Viana do Castelo". The Workshop had a lively moment of debate with the audience and was closed by Óscar Burmester, President of the Port Community of Viana do Castelo.



Escola Nautica Day 2021

The Agency sponsored two practical training trips to the best students of the ENIDH's degree courses in Transport and Logistics Management and Port Management, who completed the first two years of the respective courses.

The awarded students will take the course in the next edition of MOST Iberia.



Conference INTERMODAL 2021

The Agency's annual conference took place on the 24th of September, within the scope of the "Porto Maritime Week", an initiative of "Transportes & Negócios". This session, under the theme "Intermodal 2021", took place in Porto de Leixões, in the auditorium Infante D. Henrique.

After the opening, there was a panel dedicated to the "Operators' Experience", with the following speakers: Steven Van Loo (CLdN RoRo), Lisa Westerhuis (Samskip), Carlos Vasconcelos (Medway) and Daniel Pereira (Jomatir Logistics), followed by discussion with the audience.



T&N CARGO Awards - Best ShortSea Shipowner 2019

The Agency once again sponsored another edition of the CARGA award by T&N, with the award given to the “Best ShortSea Shipowner” in 2021. This year, the award was won by CONTAINERSHIPS.



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Main Actions 2020-2021

Annual SPC-Spain Conference: The 2021 Conference “SSS, Commitment to sustainable and efficient freight mobility” was held in Bilbao, on 11th November, and brought together almost 150 representatives of companies and institutions directly related to the SSS. The conference was opened by the Spanish General Secretary of Infrastructure, Transport and Housing, and its topics were:

- Towards a more sustainable intermodal chain.
- Financing projects for a smart and sustainable transport.
- Digitize and automate to gain efficiency and sustainability in the transport chain.
- Lessons learned from Brexit. The efficiency of border controls to boost SSS

For more details see: <http://shortsea.es/index.php/documentacion/jornadas-spc-spain>



Institutional meetings with governmental entities and political representatives. SPC Spain presented proposals for:

- Amendment of Directive 92/106/EEC on the establishment of common rules for certain types of combined transport of goods between Member States
- Real Decreto transposing Directive (UE) 2019/883 on port reception facilities for the delivery of waste from ships, amending Directive 2010/65/EU and repealing Directive 2000/59/EC
- European Union public consult for Climate Change – updating the UE emissions trading system (ETS)
- Public Consultation for the FuelEU Maritime –Green Maritime Space Initiative
- Real Decreto project for port reception facilities for ship-generated waste.
- Survey by the Ministry for Safe, Sustainable and Connected Mobility Strategy in 2030
- Open public consult for impact assessment to the TEN-T regulation review.

SPC Spain has joint to Spanish Platform for Promotion of synthetic and biofuels on September 2021. Ecofuels are the only formula for maritime transport decarbonisation in the short term. For more details: <https://ecocombustibles.com/plataforma-de-ecocombustibles/>

Participation in ESSF's plenary and SubGroups meetings. SPC Spain is member of the ESSF plenary and takes part in three ESSF's SubGroups:

- Alternative Power Sub-group
- Ship Energy Efficiency sub-group
- Waste from Ships Sub-group

Promotional Activities

Holding 5 workshops in different Spanish cities (Cádiz, Almería, Barcelona, Huelva y Cartagena), to promote maritime – land intermodality, focusing on the needs of shippers, logistic operators and road hauliers.

<http://www.shortsea.es/index.php/documentacion/jornadas-spc-spain>

Weekly newsletter of SSS related news: <http://www.shortsea.es/index.php/prensa/newsletter>

SPC Spain's presence in specialized media with articles and interviews.

Continuous website updating



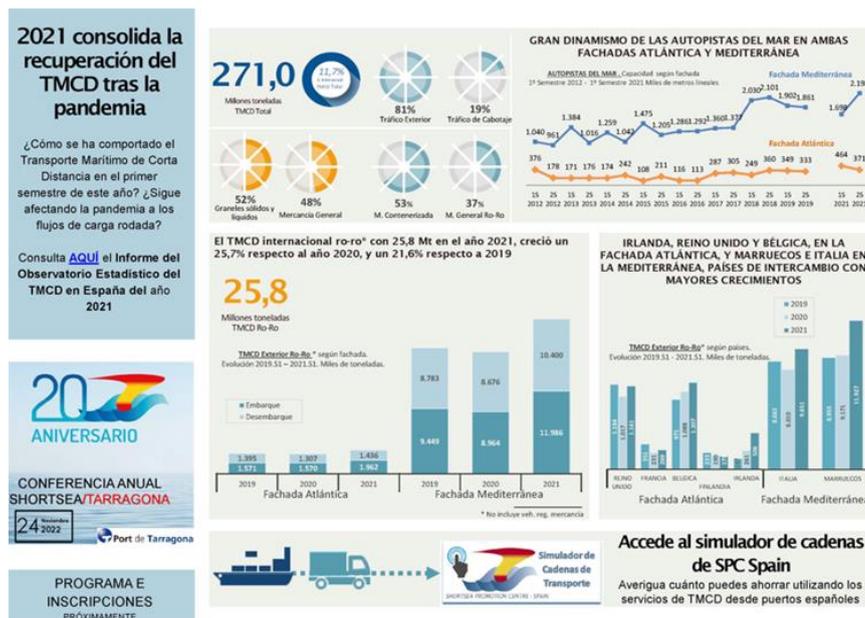
Knowledge & monitoring of the Short Sea Shipping activity

SPC Spain launched three issues of the Spanish Shortsea Statistical Observatory in 2021: 2020 Annual Edition, and two additional to monitor the COVID-19 effect on the SSS. Available in the following link: <http://www.shortsea.es/index.php/observatorio-estadistico>

Best Practice

New MoS services linking Spain with Ireland

As a Brexit result, two new SSS regular ro-ro services connect the Spanish ports of Santander and Bilbao with the Irish ports of Dublin and Rosslare since 2020, with two exits per week and sense from each port. Brittany Ferries and CLdN shipping companies offer these services that has increased their traffic over half a million tonnes in 2021.



SSS companies operating in Spain are committed to the environment

The shipping companies involved in Spanish SSS have shown a high commitment to the environment. Some companies have selected LNG propulsion for their fleet, such as Balearia, Brittany Ferris or UECC; others have included other kind of environmental measurements as batteries instead of auxiliary engines for electricity consumption in port, as Grimaldi.

Outlook 2022

Annual Shortsea Conference 2022: will be held in Tarragona on November 24th. 20th annual celebration of Spanish SPC.

Eco-incentives: the Spanish Transport Ministry is going to implement an economical eco-incentive programme for the road hauliers that use the Spanish MoS.

Promotional Activities: Four workshops are planned in different Spanish cities, to promote SSS, focusing on the needs of shippers, logistic operators and road hauliers.

Knowledge & monitoring of the Short Sea Shipping activity: During 2022, SPC Spain will launch, the customary two issues of the Spanish Shortsea Statistical Observatory.

Cooperation with Public Administrations:

- Contribution to the new Law of Sustainable Mobility creating instruments and procedures to support and promote SSS.
- Cooperation with Puertos del Estado to improve the Border Inspection Services.

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SPC TURKEY



Main actions 2020-2021:

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.

Educational agenda followed on basis subjects as industry topics.

Harmonizing rules and practices as regards shipping, to make researches and collect information on shipping, to ensure that sea trade is developing in accordance with the national policy of transportation, to supply information to foreign organizations on the capabilities and tariffs of the Turkish ports, to become member of and to follow activities of the international organizations concerned with shipping and to perform other functions stated in the law.



Best Practices:

Maritime Nation and a Maritime Country idea/project competition was held for maritime transportation, maritime trade, shipbuilding and yacht building, marine tourism, maritime resources, ports, logistics, maritime training, and employment.

Focus 2022:

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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