



European Shortsea Network

2016 – 2017
Annual Report
European Shortsea Network

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Forward Europe



The maritime dimension of transport has been a catalyst for the economic development and prosperity of Europe throughout its history. Still today, shipping contributes to connect Europe to its partners around the world, as three quarters of the EU external trade is seaborne. But maritime transport is not only about crossing oceans: in 2015, short sea shipping made up close to 59 % of the total of goods transported by sea to and from the main EU ports.

Consequently, improving the competitiveness and sustainability of the maritime sector, and of short sea shipping in particular, are priorities of the EU transport policy. Shipping plays a key role in linking different regions of the Union and supporting the greening of transport.

Commissioner Bulc has designated 2017 the "Maritime Year" with a view to modernise the EU's framework for maritime transport, by identifying key priorities and actions through dialogue between all stakeholders, as well as raising awareness of the important role of maritime transport. Throughout the year, the importance of continuous improvement on safety and security, the growing significance of the sustainability issues and the need for further simplification and uptake of digital solutions have been recalled.

The "Maritime Year" has set up in motion a process which will not end in 2017 – several initiatives launched on this occasion are expected to mature and deliver results in the coming months and years.

For example, the work on reporting formalities has greatly progressed during this year and the Member States have, in the Valletta declaration, supported the idea of introducing an electronic manifest through a harmonised European Maritime Single Window environment,

in order to set up a European Maritime Transport Space without Barriers and improve the efficiency and attractiveness of the maritime transport sector. This should fully address one of the remaining bottlenecks for the further development of short sea shipping.

The discussions within the European Sustainable Shipping Forum (ESSF) have also continuously helped addressing challenges and developing solutions through collaboration with all relevant maritime stakeholders and national administrations. In particular, progress has been made this year on LNG bunkering guidelines, which should support and facilitate the transition to alternative fuels in the shipping sector to ensure greater sustainability.

The Commission has also completed this year the ex-post evaluation on the development of the Motorways of the Sea concept from 2001 and possible ways forward. This report and the detailed implementation plan from the Motorways of the Sea coordinator will undoubtedly be important elements to be taken into account in upcoming discussions on the review of the EU financial framework in 2020.

These elements are important opportunities for the sector. In this context, the European Shortsea Network and its members, the national Short Sea Promotion Centres, have a particular role to play. By pulling together and promoting the use of short sea shipping, enhancing cooperation among stakeholders and disseminating best practices, the ESN can make sure that the untapped potential of shipping is fully exploited.

Sandro Santamato
European Commission
Head of Unit Maritime Transport
and Logistics

Chairman's Foreword



Why should a cargo owner opt for carriage of his cargo by shortsea shipping instead of by other modes of transport?

This is the dilemma that faces shortsea shipping operators and other stake holders involved in the logistical chain. The latest Eurostat data shows that although cargo through shortsea shipping has grown by 0.9% to 1.8 billion tons, when analysed in detail these figures prove that containers increased by 44% and RoRo by almost 12%. On the other hand, there were decreases in liquid bulk, dry bulk and general cargo.

All stake holders subscribe to the fact that the development of shortsea shipping is not at the expense of other modes of transport but rather, it is another factor – a very important one – that in combination with other transport modes, go to provide a multimodal solution for logistical requirements. The demand side prioritises cost and transit time. The supply providers look at economies of scale and a balance between cost and revenue. The European citizen on the other hand gives priority to environmental (less emissions) and health and safety consideration (road accidents and hours of work for overland operators).

This is the operating environment of the shortsea initiative that the European Union embarked upon since 2001 when it laid down the three main objectives, namely:

- Freight flow concentration on sea based logistical routes;
- Increased cohesion;
- Reducing road congestion through modal shift.

Time has shown that it is not an easy feat even though substantial amounts of European funds are invested every year in programmes, such as the Motorways of the Seas and the Ten T to

There still exist a number of challenges and bottlenecks that need to be addressed in order to have a level playing field between the various modes of transport. These bottlenecks are today identified and solutions are being addressed through enhanced digitalisation of processes (such as the single window) simplification of reporting requirements and funding initiatives that improve modal shifts.

The process is not an easy one and it entails constant and consistent education of stake holders as well as dissemination of information. This is the role that ESN aims to fulfil. The network of national promotion centres is unique in terms of expanse and impartiality. The ESN is not a lobby group and thus can serve both as a catalyst and a marketing tool by the Commission which has the task of ensuring that its voice is heard by all stake holders. As can be seen from the experiences of various SPC's as reported in this annual report, some SPC's are making steady progress in integrating with the private industry to look for solutions to their transport / logistics challenges. Various initiatives have been undertaken by the SPC's especially with shippers to solve problems that they face and propose solutions within the remit of the transport policy.

The way ahead for ESN is further integration into this concerted European effort to shift more cargo to move by sea. The agenda of ESN has to be part of EU's transport agenda so that the objectives laid down by the Commission are met. ESN has to proceed on a clear business plan that takes into account the objectives of the EU and the challenges faced by the private industry.

Godwin Xerri
Chairman European Shortsea Network

Shortsea Promotion Centre Bulgaria



Main actions 2016:

Information -via newsletters, working groups and meetings for European maritime transport guidelines:

European Sustainable Shipping Forum, Digital Transport and Logistics Forum and Detailed Implementation Plan for Motorways of the Sea.

BG ECA Retrofit Working Group (organized by the SPC Bulgaria) continues the preparation of a BG Ship Plan 2020 for modernization of Bulgarian shipping - new ships and retrofits;

National Business Council for Trade and Transport Facilitation/e-Documents (organized by the SPC Bulgaria) prepared and presented to the Ministry of Economy a concept / plan for establishing a National electronic system for international trade and transport, as a Port + Transport Community System;

At the invitation of SPC Bulgaria and with the assistance of the Ministry of Transport, the European Coordinator for Motorways of the Sea - Mr. Brian Simpson visit Port of Burgas.



Main events 2016

Bulgaria Intermodal - SEE Freight Transport Logistics Conference 2016, organized by SPC Bulgaria with kind assistance of UIRR- International Union for Road-Rail Combined Transport. Important topics about modal shift, co-modality and regional/Black sea-East Med MoS were discussed.

Focus 2017:

Preparation of European Stakeholders Shipping Forum-High Level Director's Conference- 3/4 May 2018 Varna, for dialog and debate on the next European Maritime Transport Strategy 2019 /2028;

During Varna EU Ship Forum 2018 a special Events-Workshops-Round Tables will take place:

- European Short Sea Shipping; Sea Regions SSS Development/strategies, Annual ESN Meeting

- EU Shipping Financial Tools; EIB,s Green Shipping Programmes. Europa Ship Plan.BG Ship Plan

- Bulgarian Maritime Transport Strategy 2019-2028.Stakeholders WG viewpoint/state point

- One Belt One Road; China-East European countries (16+1). Black Sea/East Med Maritime routes

- Ferry Boats Black Sea Workshop; For modern Ferry/Ro-Ro ships/services and Ferry Boats network

- MoS DIP - a Strategic document for the next EU Maritime Transport Strategy 2019/2028

- European Maritime Security Strategy – Regional aspects Black Sea.EC EMSA CG Functions

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Shortsea Promotion Centre Denmark

SHORTSEA PROMOTION
DANMARK

Main actions 2016:

SPC DK is still basically a forum for the different stakeholders involved in the seaborne multimodal transport chain. The highlights of 2017 have been two Round Table discussions with a number of interested parties participating. The main topic was the barriers for the development of Short Sea Shipping and the possibilities of finding solutions. The Round Table discussion concept has shown itself very useful covering all the aspects of the seaborne multi modal transport chain one by one.

Focus 2017:

The concept of Round Table discussions will continue. A new Round Table discussion is currently being planned. Focus will be on heavy load containers transported by truck in Denmark instead of by ship. This needs to be changed, but how?



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Shortsea Promotion Centre Estonia



Main action 2016:

SPC Estonia has shared information on shortsea transport, port authorities and operators, and freight forwarders as well as on rail, air, and road transport. The main communication channels are SPC Estonia website (www.shortseashipping.ee) and newsletter (sent out every 1-2 months).

Focus 2017:

The main focus in 2016 is to keep updating our website with up-to-date shortsea shipping news and to send out newsletter every 2 months.

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Main actions 2016:

SPC Finland's Shipping Barometer was published on 14 December 2016. The results were published also as a video presentation, available in Youtube. The barometer is based to survey for main shipping companies operating to and from Finland. It provides annual information on shipping trends and on ship owners' views on topical issues. In the Shipping Barometer 2016, the topical issue surveyed viewpoints on EU Ship Recycling Regulation. This year's Barometer will be published in December 2017.

Focus 2017:

- Initiate projects on shortsea shipping and advice on EU funding possibilities for shipping sector.
- Maritime environment related projects in the Baltic Sea area, analysis of status and impacts of maritime environmental legislation. The Centre for Maritime Studies coordinated a study published in June 2017 on the Impact of Upcoming International Environmental Shipping Regulations on Finnish Economy. Comprehensive interviews were undertaken for ship owners and ports in Finland. The publication is part of the implementation of the Finnish Government Plan for Analysis, Assessment and Research for 2016.

- EnviSuM - Environmental Impact of Low Emission Shipping: Measurements and Modelling Strategies studies technical efficiency and socio-economic impacts of clean shipping solutions. This project is financed by Interreg Baltic Sea Region Programme and coordinated by the University of Turku. The results will provide policy makers and authorities with tools and recommendations for the development of future environmental regulations, and the shipping sector with guidance to support future investment decisions.
<https://blogit.utu.fi/envisum/>

- Shortsea shipping in the context of maritime spatial planning (MSP) and blue growth. Plan4Blue – Maritime Spatial Planning for sustainable blue economies – project supports growth of the marine and maritime sectors in a way that emphasizes the need to find a balance between economic, social and environmental goals. Plan4Blue is financed by the Interreg Central Baltic Programme and focuses on cross-border collaboration on Gulf of Finland and Archipelago Sea areas.
<http://www.syke.fi/projects/plan4blue>



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Shortsea Promotion Centre Germany



Main actions 2016:

In June 2016, SPC Germany organized the 2nd ShortSeaShipping Days in Luebeck, which consisted of a conference and a small fair. We welcomed almost 400 participants. The next Shortsea Days will take place on 20th and 21st June 2018 in cooperation with the annual Conference of the European Shortsea Network in Luebeck.

Focus 2017:

The main action in 2017 was the presence of SPC Germany at the transport logistics fair in Munich in May. The fair is the biggest transport fair worldwide with around 60.000 visitors.



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Shortsea Promotion Centre Greece



Main actions 2016:

- Initiation of a Multisector collaboration platform for the promotion of SSS. Platform gives emphasis on the exchange of information, know-how and the development of common actions and activities for the promotion of a more coherent approach for the integration of SSS in transport chains.
- Study (in process) for the enhancement of the role of SSS in national economy and the cohesion of the country.
- Collaboration with Greek stakeholders for the promotion of river transport potentials.
- BlueGrowth@Aegean: participation to SSS workshops during European Maritime Day 2017
- Participation in plenary meetings of ESSF
- Contribution to the establishment of Marine LNG Network, a multi-sector coalition aiming to generate and widespread knowledge on LNG as marine fuel for Shortsea Shipping.
- Continuous collaboration with Universities in R&D and students' info days

Focus 2017:

- Expansion of activities to include more players along the supply chain
- Strengthen further working and collaborating with Greek authorities
- Completion of the study on the contribution of SSS in national economy
- Continue cooperation with academia



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Shortsea Promotion Centre Italy



Main actions 2016:

- Elaboration of the “Masterplan of the Italian Mos” focusing, on the infrastructural projects, financial opportunities, designing a market analysis for MoS in the Italian context
- Sign of the Memorandum of Understanding between SPC Italy and Escuela de SSS;
- Involvement in 4 european projects approved under the Adrion and CEF programme;
- Contribution to the MoS Detailed Implementation Plan, through the exploitation of relevant activities deployed in 2 CEF project (Med Atlantic Ecobonus and Fresh Food Corridors);
- Participation to the TEN-T Days in Rotterdam with 4 stands;
- Organization of a panel during the Naples Shipping Week, related to the importance of the Mos in the Med-area

Best Practices

Marebonus and Ferrobonus

SPC Italy, acting as implementing body of the Italian Ministry of Infrastructures and Transport, has developed from a legal and administrative point of view, the 2 national incentive schemes aiming at implementing 2011 EC White Paper on Transport objectives. Marebonus and Ferrobonus have been approved by the European Commission.



Focus 2017:

- Support the implementation of the National Strategic Plan for Ports and Logistics recently approved as implementing body of the Italian Ministry of Infrastructure and Transport;
- Support to private (mainly ship owners) and public entities (mainly Port Authorities) to exploit the potential offered by the new European financial framework targeting on blending the traditional grants provisions with innovative financial instruments, such as technical assistance on the EFSI project application and on the new CEF 2017 Blending Call for proposal;
- Involvement together with SPC Croatia and Greece – in “MultiAppro” project under the Adrion programme (MultiAppro) aiming to foster the cooperation among the national SPC’s of the Eusair Region in order to establish an analytical model for the calculation of the maritime and intermodal infrastructural investment impacts on the TEN-T corridors traffic of the related area;
- Drafting of the “Conto Nazionale delle Infrastrutture e dei Trasporti” chapters on maritime segment and EU funds (a yearbook dedicated to the collection of data on national transport traffic and infrastructure investments);
- Lectures in specialized workshop dedicated to the promotion of SSS (MOST Italy, lessons in Universities, etc....);
- Participation to several specialized fair (Munich Transport and Logistics, SILT Paris, Fruit Logistica Berlin, CEF conference Tallinn)
- Organization of the Second National Forum for Ports and Logistics (Livorno, 05th April 2017).

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Shortsea Promotion Centre Malta



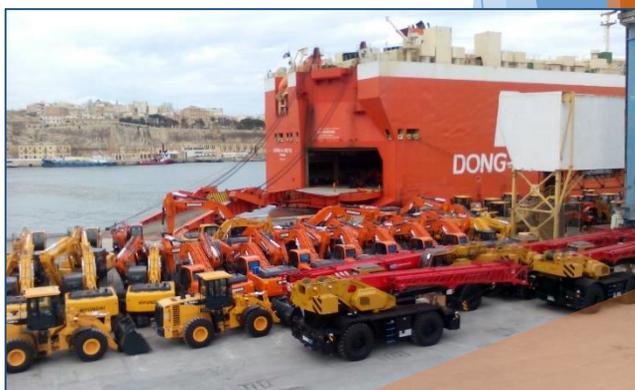
Main actions 2016:

- Malta has assumed the Presidency of the European Shortsea Network as from 1st January 2016 and has led regular meetings and coordinated inputs.
- Various meetings and contributions to the establishment of the Malta Maritime Forum. MSPC is now an active member and contributes in the consultations with government in the development of public policies that can have a bearing on the Maltese maritime industry.
- Malta has successfully concluded the process of establishing ESN as a legal entity, as an organisation under Maltese Law.
- Review of local practices that hinder or obstruct the free movement of seaborne cargo on Malta continued, with specific activities and a seminar.
- Facilitating and promoting awareness amongst the Maltese transport community in the facilities and opportunities offered by the European Shortsea Network.
- The education of the Maltese transport community in the facilities and opportunities offered by the ESN.
- The identification of suitable training courses funded by the EU.
- The participation of Malta in EU projects related to transport.
- Opportunities, through appropriate EU funds, for Maltese interested parties, e.g. shipowners, trailer operators, service providers.
- Giving input and feedback on policies that influence the maritime industry on a local and EU level.
- Attended and participated in various conferences, seminars and workshops on short sea shipping both locally and abroad.

In addition the MSPC continues to provide the market information and data as it has done in the past years through its monthly newsletters and meetings, the MSPC website, the compiling of maritime statistics, press releases, input with Maltese news in the European Shortsea Network website and discussion with potential members.

Focus 2017:

- Malta will continue with the Presidency of the European Shortsea Network until the end of 2017, with the focus of reorganising the European Shortsea Network to be more practical and effective.
- SPC Malta will also restructure it's set up to be led by an executive management team, improving response, focus and flexibility.
- Promote shortsea shipping vis a vis the policy makers.
- Provide data and market information to the Authorities.
- Give advice on shortsea shipping policy.
- Act as contact point for European Union programmes and funding related to shortsea shipping.
- Contributing to lay down a strategic plan to be presented to the EU Commission.



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Shortsea Promotion Centre Norway

SHORTSEA SHIPPING NORWAY

Main actions 2016:

- Creating Shippers' Forums. A number Shipper's Forums were organized by Shortsea Promotion Centre (SCP) Norway where members work together to improve their cargo flows. Use of existing shortsea services is optimized and new services are developed. The forums supports the government in its efforts to shift cargo from road to sea.
- Offering shortsea services. For members of the Shipper's Forums and visitors to ShortseaSchedules, SPC Norway offers the best possible shortsea services for their cargo requirements. SPC Norway also facilitates the development of new services in segments where existing services are uncompetitive.
- Establishing modal shift incentives. Together with the government and the maritime industry, SPC Norway has developed incentives for modal shift in Norway.

Focus 2017:

- Promotion of incentives for modal shift offered by the Norwegian government.
- Campaign to promote shortsea shipping from Poland to Norway. Jointly with SPC Poland. Sponsored by the transport industry. Targeting Polish exporters and Norwegian importers.
- Development of new transport solution for close distance sea transport with zero emission in unmanned vessels. Multiple projects.
- Bottle-neck project with Norwegian ports to reveal for which cargoes shortsea shipping is not competitive and why.



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Shortsea Promotion Centre Poland



Main actions 2016:

January 2016

- SPC Poland was the host of traditional New Year's Meeting for 200 guests from the maritime sector attended this event
- support / sponsorship and active participation in the seminars: " Safety of Ports" organized by Maritime Office in Szczecin "Port as a local and regional economic growth's factor" organized by Maritime Academy in Szczecin

May 2016

- SPC Poland continued as main organizer of an annual "Herring Szczecin " gathering over 2400 representatives of seaborne industry from all over the world

June 2016

- support / sponsorship and active participation in the 5th Maritime Congress in Szczecin which attracted about 800 participants.

September 2016

- Word Maritime Day – SPC organized and sponsored traditional meeting on board of the river boat for 100 participants where various presentation, speeches relating to shortsea, ports and logistics were given

- SPC sponsored and actively participated in "Ballast Water Management Convention" seminar organized by Maritime Office in Szczecin SPC Poland was also active in the promotion of the SSS via local media as well as in supporting various initiatives and projects.

Focus 2017:

- "Ship to Norway " project – modal shift potential analysis - cooperation with SPC Norway / Unifeeder and Greencarrier
- 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
- working on the improvement of the website contents
- securing financial support of SPC Poland
- acquiring new members

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Shortsea Promotion Centre Portugal



Main actions 2016:

In 2016, the Agency developed its activity focused on 3 general objectives:

1. To strengthen the role of ShortSea Portugal in the National and European context;
2. Support Training and Research;
3. Capture New Associates and Strategic Partners.

In these objectives, the following actions are worthy of note: completion of the rebranding of the agency with the creation of the "Shortsea Portugal" brand; launch of the new portal www.shortsea.pt and Facebook account; partnership with the Escola Náutica in the granting of two scholarships for attendance of the MOST Management course of the EESSS; participation in the European SSS Conference and the annual ESN meeting in Barcelona; distinction with the EESSS ARETE EXCELLENTIAM award; a protocol agreement with the Escola Náutica to strengthening our partnership for the creation of new training projects, knowledge sharing and innovation in the areas of Maritime Transport promotion, namely Short Sea Shipping, National Cabotage and Traffic Inland waterways, as well as intermodality.

Focus 2017:

The main activities scheduled for 2017 are focused on three strategic objectives:

- SO 1 - Disseminate information on SSS services / offer and intermodal transport in Portugal;
- SO 2 - To promote and disseminate SSS and intermodality to educational, training and research institutions and business associations;
- SO 3 - Institutional strengthening and cooperation with national and European entities related to shipping and intermodality.

In these axes of action, the following activities stand out: to increase the contents of the portal with updated and useful information to the members; continuity in the partnership with the Escola Náutica and the promotion of merit, rewarding the best students; presence in the European forums of discussion and promotion of SSS; strengthening cooperation with European counterparts and increasing membership.

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Shortsea Promotion Centre Spain



Main action 2016:

•European Shortsea Conference: The 2016 European Shortsea Conference held in Barcelona (September 29 and 30), which brought together about 180 representatives of companies and institutions directly related to the Short Sea Shipping (SSS). The conference was structured in 5 major thematic areas:

- Shortsea Shipping Markets
- Shortsea Shipping Demand
- European Environmental Regulations
- Transport Policies and Financing
- Training Activities

•Given the success of the Conference, the SPC Spain received the 2016 Award as the “Best Company or Institution related to the Naval or Maritime sector” from the Association of Naval and Oceanic Engineers of Spain.

Best Practice:

Motorway of the Sea extension to Tangiers by Suardiaz. Suardiaz extended the Motorway of the Sea, servicing the Port of Tangiers (Morocco) twice a week and increasing the frequency between Vigo & Nantes–St. Nazaire to four departures per week.

The Motorway of the Sea extension and its frequency increase are a great opportunity for the industries located in the serviced ports’ hinterland. Above all, for those present in Northwest Spain (Galicia in particular), North of Portugal, and Northwest France, due to the consolidation of a reliable and high frequency logistics solution.

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This service will help support the trade and commerce with Morocco, Spain’s second trading partner outside the EU.

This extension will be a great step in the development of the Atlantic Corridor, in accordance with the European Commission (CEF)

Focus 2017:

•Training Activities: To promote maritime – land intermodality, Spanish General Directorate of Land Transport granted funds to the SPC Spain to develop five training programs in 2017 focusing on shippers, logistic operators and hauliers.

•Knowledge & monitoring of the Short Sea Shipping activity: During 2017, SPC Spain will launch two issues of the Spanish Shortsea Statistical Observatory, 2016 Annual Edition and 2017 first half.

•Cooperation with Public Administrations: participation of SPC Spain in the Logistic Forum of Ministry of Development, and in the Port Services Observatory of Puertos del Estado, cooperation with the Directorate General of Customs in the “Blue Belt Package”, etc.



