

2019-2020



Annual Report

European Shortsea Network



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CHAIRMAN FOREWORD

Dear readers:

We are pleased to be able to give you an overview of the activities of the Shortsea Promotion Center (SPC) in the European Shortsea Network (ESN) in this annual report.



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COVID-19 has the world firmly in its grip; European countries are affected to varying degrees. Logistics and shipping have proven to be a reliable and stable system in these times of crisis. COVID-19 will continue to affect us strongly in the coming months, as well, and the possible long-term effects remain to be seen. Questions arise as to whether production will be shifted back to Europe and what this might mean for the flow of goods. We will probably get no clear answers in the near future. Of course, the developments in the last weeks and months have also had an impact on the work of the Shortsea Promotion Center. In the meantime, however, we have adapted to the circumstances and are continuing to work hard on promoting shortsea shipping in Europe. There are plenty of good reasons to do so.

Over one third of the cargo transport in the EU is carried out by shortsea shipping. In relation to tonnage, shipping is the environmentally most favorable mode of transport. Shortsea shipping takes on a pioneering role in this respect. The so-called Emission Control Areas have led to most innovations generally being implemented in shortsea shipping first, since its shorter routes are predestined for the use and further development of new technologies. For that reason alone, shortsea shipping should be given as much attention as possible. Particularly since there is still a lot of freight on the roads that potentially could be transported on waterways. At the same time, steps toward zero emissions need to continue being taken. Anyone trying to improve their environmental footprint nowadays needs to at least look into shipping by sea or waterways as an alternative. The national Shortsea Promotion Centers are glad to provide assistance.

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 shortsea shipping even more important and meaningful. This goal can only be reached if this form of transport, already the most environmentally friendly one, is given higher priority in regard to the choice of transport modes, regulatory frameworks and conditions, and subsidies.

We would like to thank Prof. Kurt Bodewig, European Coordinator for TEN-T Motorways of the Sea, for his assessment of the future of Motorways of the Sea in connection with the European Green Deal.

ESN supports the promotion of shortsea shipping through numerous activities of the national SPCs and regular exchange of information with the relevant European institutions and businesses. The following pages will give you an overview. Hopefully they will provide you with interesting information. I would like to cordially invite you to make use of the expertise of the national SPCs.

In closing, I would like to remind you of an extremely important, but seldom mentioned effect of shortsea shipping. It links not only the markets, regions, and economies in Europe, but the people, as well. Millions of passengers on ferries are the best proof of this. Today more than ever, this is a point that deserves to be emphasized: "Shortsea shipping makes connections."

Markus Nölke
Chairman ESN



The Future of in the context of the

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AN INITIAL ASSESSMENT

by Prof. Kurt Bodewig

Only 100 days after the new EU Commission had been in office, President Ursula von der Leyen presented in March 2020 the so-called “European Green Deal”, setting the goal of a climate neutral Europe by 2050. In her annual State of the Union address of 16 September 2020, she even stepped up the ambitions of the Green Deal by unveiling a plan to cut the European Union’s greenhouse gas emissions by at least 55 per cent from 1990 levels by 2030.

What does this mean in view of current worldwide debates about a new responsibility for the climate? In which way climate policy can also be linked to new conditions caused by the impacts of the global Covid-19 pandemic on societies and economies?

The world is currently facing unprecedented challenges compared to past economic and financial crises. This requires unprecedented efforts to recover. The central element of Europe’s response to the crisis is the NextGenerationEU programme, a 672.5 billion EUR recovery and resilience

facility. This programme will be firmly linked with the European Green Deal aiming at a green and digital transition of Europe’s economy. In this context, we see the worldwide shipping and maritime sector facing particular new challenges since this sector always acted at global scope and

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Motorways of the Sea European Green Deal

had ever since been confronted with global competition.

The EU Green Deal:

Significant steps towards a European Green Deal have been made during the first year of Ursula von Leyen's leadership of the European Commission. It is a remarkable achievement that the three European Institutions – European Commission, European Council

and European Parliament – have agreed on the fundamental goal of decarbonising Europe by 2050. At the same time, the Commission has been confronted with very complex challenges: above all with the unprecedented economic and health crisis due to the Covid-19 pandemic with severe drop-downs of European economies as well as with renewed refugee and migration crises. All these circumstances have put a heavy burden on the European Institutions. However, the EU Green Deal always remained in the focus, even with the huge recovery efforts needed to face the Covid-19 pandemic. Equally, the European transport policy, which is directly and indirectly affected by the pandemic got another attention during this crisis.

The Covid-19 crisis has proven to have devastating effects on air transportation as well as on the maritime sector. The drop in air traffic, which dropped down to less than a tenth of the level

reached the year before, clearly shows this. The economic damage caused by the steep decline in industrial production hit the German seaports just as suddenly. Overland transport was confronted by a range of problems caused by lockdowns and travel restrictions, and up to several days of delays at the border crossings. The European Council of Ministers on Transportation was able to improve this situation with new and clear rules set up via the concept of "green lanes".

In the future, the Green Deal will play an important role not only with regard to the recovery of the transport sector but most importantly with regard to its future reorientation.

On 11 December 2019, the European Commission under the leadership of President von der Leyen presented the action plan of the Green Deal that sets ambitious goals:

- 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.

Soon after, on 14 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

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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 mobilise 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.

In addition, the “Just Transition Mechanism” has been set-up: the EU will provide financial and technical support to people, companies and regions most heavily impacted by the transition to a more environmentally sound economy. 100 billion EUR will be provided during the period 2021–2027 for the most affected regions.

However, the presentation of the draft of an EU climate law on 4 March of this year also showed that consensus has not yet been reached on a comprehensive legislative programme aiming at climate neutrality in Europe. Concrete legislation are to be worked out in 2020 and 2021 and then debated by the EU states and the European Parliament. The EU Commission and the Council Presidency will be facing the mounting challenge of achieving consensus in light of the recovery phase following the acute crisis. On the other hand, the goals targeted by the deal also provide opportunities for an important transformation process that may also make it possible to link the various goals mentioned in the beginning.

TEN-T and Motorways of the Sea

It is clear that transport will have to play a key role in implementing the Green Deal. The Trans-European Transport Network (TEN-T) and its nine corridors already respond to the necessary decarbonisation of the transport sector, which includes various elements such as traffic reduction and a shift to more environmentally friendly modes of transport.

The European legal and regulatory framework related to the Green Deal is already being worked out with numerous legal initiatives. Among them are the revisions of the Directive on Alternative Fuels Infrastructure

and of the TEN-T Regulation.

The Motorways of the Sea (MoS) play a special role in this context. The central goal of MoS according to the TEN-T Regulation is to create a European maritime transport space without borders.

The MoS programme is financed through the Connecting Europe Facility (CEF). MoS supports and promotes the maritime economy and maritime transportation modes and ports in upgrading or creating new maritime links as well as via so-called wider benefit actions (e.g. sea traffic management strategies etc.).

The CEF I programme of 2014–2020 funded the maritime sector with 1.5 billion EUR so far, whereof 435 million EUR were devoted to 50 MoS projects



Shortsea Promotion Centre

INTRODUCTION

(status as of January 2020), which are usually co-financed with 70 percent of national funding. A large part (185 million EUR) of the MoS funds went to projects with an environmental priority (for example for the development of alternative fuels, LNG terminal development, etc.).

The maritime sector is facing immense challenges that are currently being further intensified by the Covid-19 situation. The necessary conversion to a sustainable economy affects all areas, from propulsion technology and fuels to a sustainable organisation of supply chains using emission-free modes of transport. All this clearly shows that much still needs to be done in the area of short-sea shipping and the maritime sector as a whole. The Green Deal documents do mention short-sea shipping, but unfortunately do not consider it as

a sustainable mode of transport. We need to take a stronger position in this regard in the upcoming discussions. Therefore, as European Coordinator for MoS I plan to intensify this discussion and position short-sea shipping more strongly in the policy discussions with decision makers.

A modal shift from roads to maritime shipping makes sense only, and especially, if the maritime connections are climate neutral. That means that maritime and inland shipping already need to make great efforts right now if decarbonisation is to be achieved by 2050. The development of technological innovations and new – zero-emission – fuels for shipping must be advanced in these areas and in research and development (R&D). It is important that EU regulations as well as the international IMO guidelines point in the same direction: decarbonisation and reduction of emissions have highest priority, as SECA (Sulphur), NECA, and other regulations show.

In my Detailed Implementation Plan (DIP) for Motorways of the Sea, which has been published in July 2020, the primary goal is to “create a sustainable, smart, and seamless European Maritime Space” with three aims:

- Sustainable: reduction of GHG emissions and water and air pollution.
- Seamless: improvement of landside connections with the TEN-T network and the core network corridors; better seaside connections with the peripheral and ultra-peripheral regions of Europe.
- Smart: digitalisation of the maritime sector; maritime safety and automatisation.

The Future of MoS:

The concept of MoS might have to be changed and redefined in the future. The evaluation of the TEN-T guidelines, which has been kicked off last summer and led to a broad public discussion, already reached a high response. Over 650 statements were submitted, showing that TEN-T is viewed as an important element in shaping the future transport policy. Maritime views were also strongly expressed. This TEN-T evaluation is to be concluded in Autumn 2020.

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Building on that, the EU Commission will initiate the revision of the TEN-T Regulation. The Commission plans to present a legislative proposal for a new TEN-T Regulation by mid 2021.

In the focus of the review is obviously the Green Deal; in other words the new TEN-T Regulation will considerably be reshaped in the direction of decarbonisation of transport and emission reductions. For instance, for maritime transport only LNG is mentioned as an alternative fuel in the current TEN-T Regulation. In the future, we need to open this to other – zero-emission – fuels such as hydrogen and to innovations in sustainable energy production. It is also necessary to differentiate between short, medium, and long-term energy sources.

As European Coordinator, I have initiated a dialogue with representatives of the Member States and of the EU maritime associations about the future of MoS. We can already underline the following preliminary result of this consultation process: MoS is of highest EU added value, not least because of the intensive cooperation between many European ports and the creation and upgrade of new short-sea shipping connections between two Member States with a particular focus on the deployment of alternative fuels. MoS is thus also important to reach the goals of the Green Deal.

But just ‘carrying on’ is not an option either. The quite complicated structure of the MoS CEF grants and their equally complicated implementation (strict rules on eligibility, etc.) need to be made clearer. Above all, MoS must be more closely integrated in TEN-T. It needs to become part of a truly maritime dimension of TEN-T and comprise all maritime transport elements including ports, terminals, short-sea shipping, etc. The primary goal remains that of creating a sustainable, smart, and seamless European maritime space.

Since we cannot assess the effects of the current pandemic at this point, and its worldwide development is quite heterogenous, we have to reckon with crisis-laden economic developments that are at least comparable to the financial crisis of 2007. Global industries are already suffering

from broken supply chains. Consumption has been falling worldwide; digitalisation will continue to exert its effects on the labour market. Many new developments will be disruptive at least in part. Today we have no way of knowing what effects will appear when in global regions and when or where the pandemic may subside.

That production in China has regained speed makes me somewhat more optimistic. That the economic and financial crisis in 2007 and 2008 normalised in the ports more quickly than it was expected was not conceivable in advance.

Just as in the 1930s US president Roosevelt’s New Deal was a bold plan that led to the recovery of the US and then the worldwide economy, in this situation today the European Green Deal can support the recovery phase, achieve climate goals, and further the development of a digital and research-based society. Transport plays a crucial role in the Green Deal and short-sea shipping must expand its share in the modal split if we are to reach the goals that we have set.

Kurt Bodewig,
European Coordinator for the
TEN-T Motorways of the Sea

Current Tasks (partial list):

- Professor for Transport Policy and Infrastructure at the University of Applied Sciences Osnabrück since 2014
- Honorary Professor and regular Guest Professor LOGInChina at the Hefei University in China since 2013
- Vice President of the German Road Safety Council since 2010
- President of the German Road Safety Association since 2007
- President of the Baltic Sea Forum, UN accredited NGO, strategic partner of CBSS since 2003



© Prof. Kurt Bodewig



Main actions 2019 – 2020

Intermodal Transport Cluster as an SPC Croatia is continuously working on the development and promotion of intermodality in the Croatian transport sector by carrying out the role of a bond between the economic sector and state bodies.

Best Practices

Project MULTIAPPRO



Intermodal Transport Cluster continues its work as a lead partner of the project MultiAPPRO – **Multidisciplinary approach and solutions to development of intermodal transport in region** funded under the Interreg ADRION transnational programme. Project gathers 9 partners from public and private sector operating in a total of 6 ADRION countries (Croatia, Italy, Greece, Slovenia, Albania, Montenegro). Overall objective of the project is the development of intermodal transport in the Adriatic-Ionian region and one of the main project outputs is development of Promotion Network that will encourage establishment of new SSS Promotion Centres into coordinated work of already existing Centres within European Shortsea Network. Furthermore, SSS and MoS promotion action plan serves as a strategic document for performing common promotion campaign that will be implemented within the project.



Project NEWBRAIN

Intermodal Transport Cluster is a partner on a NewBrain project which is funded under the Interreg ADRION transnational programme and activities of Intermodal Transport Cluster are co-financed by the Croatian Government Office for Cooperation with NGOs. NewBrain project, implemented by 10 organizations representing core logistic nodes of Adriatic Ionian transport system of 9 regions from EU and IPA countries, aims to unlock the potential for integrated intermodal transport, with particular reference to short sea shipping, and improve the connections between the main logistics nodes of the Adriatic Ionian area by strengthening the transnational coordination of key logistics and intermodal operators and enhancing their capacities to launch feasible investments. Project also implements activities supporting environmental dimension since the positive environmental benefits in each node are assessed and aim is to widely communicate them to the citizens to raise their awareness on the logistic node commitment to environmental sustainability.

Programme and Project initiatives

Intermodal Transport Cluster remains an active partner on a dozen of EU projects funded from different programmes: Interreg ADRION, Interreg Central Europe, Interreg Italy-Croatia, Interreg MED programme with the aim of implementing activities supporting SSS and intermodal transport sector on both national and regional level. For more information please visit our social pages or visit our website: www.shortsea.hr



Focus 2021

- **Promotion of SSS and intermodality:** implementation of project activities focused on the promotion of SSS and intermodality, participation at conferences/workshops, publication of promotion material for the entire intermodal transport sector in Croatia but also related to different project activities, keeping an up-to-date website where interested parties may find data about intermodality and shortsea shipping, publishing articles about best practices and EU projects in implementation.

Contact:

Tanja Vujnović Kereš
SPC Croatia – Tina Ujevića 52A, 51 000 Rijeka
Tel + 385 (0)51 344 252
e-mail: vujnovic@shortsea.hr
www.shortsea.hr

Main action 2019

- SPC Finland's annual Shipping Barometer 2019 was published on 22 January 2022 connected to Finland's largest maritime trade exhibition NaviGate in Turku. The barometer is based to survey for main shipping companies operating to and from Finland, and financed by the Finnish Transport and Communications Agency Traficom, Finnish Shipowners' Association and Government of Åland. It provides annual information on shipping trends and on ship owners' views on topical issues, as well as forecasting indicators of export and import of Finnish shipping industry. The barometer report is published in Finnish and Swedish.

Focus 2020

- Coordination of CSHIPP – Clean Shipping Project Platform, financed by Interreg BSR. CSHIPP focuses on the environmental effects of shipping and the business potential of clean shipping in the Baltic Sea Region. Various channels are used in dissemination of clean shipping data. The platform consists of projects and organisations focused on enhancing and promoting clean shipping in the Baltic Sea region. <https://cshipp.eu/>
- Coordination of SEAMEASURES Seed Money project, focusing on decarbonization of the Baltic Sea and the North Sea shipping. financed by Interreg BSR
- SPC Finland's Shipping Barometer 2020
- Shortsea shipping in the context of Blue Economy and Blue Growth

Outlook 2021

- Implementation and participation in clean shipping related projects in the Baltic Sea area in particular.

Contact:

Riitta Pöntynen
P.O.Box 181, FI-28101 Pori, Finland
tel. +358 40 351 0476
e-mail: riitta.pontynen@utu.fi
www.shortsea.fi



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Current Situation

Shortsea shipping plays a very important role in German seaports, accounting for around 62 percent of the total throughput. A broad range of universal, specialized, and niche ports offer tri-modal connections to the hinterland and provide excellent opportunities to shift traffic to the waterways, thus reducing congestion on the roads and improving the transportation sector's carbon footprint. To sustain the importance of shortsea shipping and to open up new potentials, spc Germany engages in five core activities in its daily work.

Currently spc has around 60 members from all parts of the logistics chain, as well as 12 ministries. The following gives a selection of examples of the many activities spc carries out.

Consulting

Shifting the transport of heavy-lift and oversize loads from road haulage to waterway shipping is a focus of our work in 2019/20. In connection with this, spc Germany organizes the annual Forum on Special Transports to network with representatives from industry, government agencies, administration, and politics. Furthermore, spc Germany is active in the working group "Shifting Oversize and Heavy-Lift Transports from Road to Waterway and Rail" of the Federal Ministry of Transport and Digital Infrastructure. The final report will be completed in Q 4/2020.

Education and Training

Expanded activities in the area of education and training focus on careers involving the waterways. Therefore, spc was present at the career choice events "Einstieg" in Frankfurt am Main and "Berufe live Rheinland" in Cologne. Increasing competition for personnel, resulting from a lack of qualified employees, makes recruitment more difficult. The website www.shortseashipping.de was expanded to include a section on occupation and career. It provides information about the occupational profiles of sailors and boat operators, locomotive engineers, freight forwarding agents, shipping agents, and port logistics specialists, as well as links to companies that offer apprenticeships in these areas.

Marketing

Participation in the transport logistic trade fair in Munich in June of 2019!

With over 60,000 visitors and over 2,300 exhibitors, transport logistic is the leading trade fair worldwide for logistics, mobility, IT, and supply chain management. At the fair, spc had a joint stand together with some of our members under the motto: "Shortsea shipping – the clever logistics solution." Twice yearly, theme nights are held and members as well as the whole spc network are invited. Topics of current interest are emphasized at the theme nights. In the spring of 2019, the current state and possible effects of Brexit were on the agenda. The theme night in the

fall of 2019 centered on digital applications in the ports. Other regular marketing activities include expanding the social media activities; our newsletter; the informational magazine spc_AKTUELL with issues focusing on topics like "Shipping and Climate," "Masterplan Inland Waterways," or "Innovative, Green, and Digital – A Branch in Motion"; image films, workshops, and more.

Networking

On the national and European level, spc is involved in numerous committees to promote the interests of shortsea and inland waterway shipping, for example in the River Sea Shipping Committee (RSSC) of the European Barge Union (EBU).

Europe

Involvement as an associated partner of the EMMA project.

The EMMA Extension Project (08/2019-01/2021) aims to enhance inland navigation in the Baltic Sea Region by supporting digitalization in inland waterway transport (IWT) and by implementing new logistic concepts in the Baltic Sea Region.

Focus in 2020:

- Initiation of the project "Beverage Logistics" in cooperation with the leading trade associations in the beverage industry and with the goal of increasing potential shifts in transport mode and integrating them into the market to increase the share of freight shipped on the waterways.
Time period: July 2020 to the spring of 2021.
- Organization of the 4th ShortSeaShippingDays (marketplace and conference event) with around 400 participants in Lübeck (postponed from March 2020 to 2021/22 because of COVID-19).
- Chairmanship of the European Shortsea network (ESN) in conjunction with the German presidency of the EU Council from 1 July 2020 to 31 December 2020!

Contact:

SPC Germany

Markus Nölke – Managing Director

Phone: +49 228 300 4890

Mobile: +49 160 9624 23074

E-Mail: noelke@shortseashipping.de

Website: www.shortseashipping.de



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Main Actions 2019

- **Shortsea Shipping Days 2019:** SPC Greece organized in June 2019, the Conference of the European Shortsea Network- Shortsea Shipping Days 2019, in Piraeus. Annual conference focused on the main challenges of the European shortsea shipping market, with the emphasis being given on technological evolutions, energy efficiency, port industry developments and policy priorities, while top issue discussed was the challenge of integrating SSS into European logistic chains. The need to modernize the European policy for SSS was emerged as a precondition for improving the competitiveness of the mode, reflecting the trends and needs of the European transport sector. Green financing, simplification and harmonization of procedures, innovation support and shifting freight mode initiatives, were some of the solutions discussed. Conference was under the auspices of the European Shortsea Network (ESN), the Ministry of Maritime Affairs and Insular Policy, the Hellenic Chamber of Shipping, the Hellenic Shortsea Shipowners Associations and the Association of Passenger Shipping Companies.

Focus 2020

- **Network for the promotion of Multimodal transport:** In March 2020 SPC Greece, the Hellenic Logistics Association and the International Maritime Union signed MOU aiming at strengthening the collaboration among signed actors, in order to develop and systematically promote multi-modal transportation alternatives in Greece.
- **Supporting academic research:** During 2020, SPC Greece focused on supporting academic transport research, particularly intermodal studies and the conditions that have led to the low shares observed in country level. Research conducted by the University of the Aegean.



- **Connecting academia and business actors:** In the context of creating a stable and structured framework of cooperation between the academic community and trade partners in the transport sector, SPC Greece promotes the sign of a memorandum of cooperation between the Hellenic Shortsea Shipowners Association, the Hellenic Federation of Road Transports and the Department of Shipping, Trade and Transport of the University of the Aegean with the aim of:
 - producing innovative and applicable research results,
 - increasing the competitiveness of SSS and road transport companies, and developing complementarity and synergies between the means
 - developing and documenting policy proposals, especially “green” initiatives for minimizing external costs
 - optimizing the overall transport system in country level and the wider region

Contact:

SPC Greece

Sapfo Simantoni

Eva Stefanidaki

81 Akti Miaouli

Piraeus, Greece

Tel: +30 210 45 26 236

E-mail: s.simantoni@shortsea.gr

Website: www.shortsea.gr

Main actions 2019/20:

Events:

The IMDO hosted the TEN-T seminar on “Ireland’s European Connectivity –Ports and maritime links in the Atlantic sea basin” in April 2019 – a joint seminar organised by the European TEN-T Coordinators for Motorways of the Sea, the Atlantic and North Sea–Mediterranean Corridors in cooperation. This event drew an international audience and created a valuable platform for the Irish maritime industry to advance its views on how the EU should meet the challenges of Brexit. The event attracted more than 120 delegates and was co-hosted by the Department of Transport, Tourism and Sport.

The IMDO are a partner on the EU funded project on “Marine and Maritime Research, Innovation, Technology Centre of Excellence (MARiTec-X)”. The European Union’s support is aimed at establishing a Centre of Excellence in Cyprus that fosters world-class research, technology development, and innovation activities related to the marine and maritime sector.

In June 2019, the Ocean Wealth Summit in Cork attracted more than 500 national and international delegates from across the marine sector. The IMDO played a key role in the business events at Our Ocean Wealth Summit.

As well as presenting a trade show event, the IMDO welcomed a trade delegation from the United Arab Emirates and signed a Memorandum of Understanding with the Dubai Maritime City Authority (DMCA) that will allow both parties to pursue mutual interests in port development and maritime commerce.

The IMDO coordinated an Ireland exhibition stand at the Digital Transport Days conference in Helsinki in October 2019.

In November 2019, The IMDO attended the Motorways of the Sea seminar on “Financing the Maritime Sector and MoS”, which was organised by the European Coordinators for Motorways of the Sea and the Atlantic Corridor and hosted in Rome by the Italian Ministry of Infrastructures.

Prof. Kurt Bodewig and Prof. Carlo Secchi presented their report on “Enabling the uptake of the TEN-T project pipeline by the financial market” and stakeholders from across the EU’s maritime sector exchanged views on presentations on the wide spectre of funding and financial instruments suitable for the maritime sector.

2019-2020 General Activities

In 2019, a consortium of ports and shipping companies was created, led by the IMDO, commenced working on a Motorways of the Sea project to build a port community system for the maritime industry, based on Blockchain technology. This project has the potential to lower costs, drive efficiency and improve competitiveness throughout the maritime industry.

The IMDO has been undertaking a number of important studies in 2019/2020, 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 2020.
- „The Development of Alternative Fuel Infrastructure in Irish Ports“ – a feasibility study published in September 2019.

The IMDO will launch the 17th volume of the “Irish Maritime Transport Economist” in June 2020 which provides valuable time series tracking the development and performance of Irelands ports and shipping services.

Focus 2021

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

International Shipping Services Centre (ISSC) in Cork: The IMDO is supporting the development of the ISSC to create a world-class cluster of international shipping orientated companies centred in Cork Docklands.

Contact:

SPC Ireland

Holly Faulkner / Kate Farrell

IMDO

Three Park Place, Upper Hatch Street, Dublin 2, Ireland

Tel + 353 (0)1 775 3900

www.imdo.ie

SHORT SEA SHIPPING
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Main actions 2019 – 2020

- Support the implementation of the National Strategic Plan for Ports and Logistics.
- Contribution to the second review of Motorways of the Sea Detailed Implementation Plan (DIP MoS) of the new European Coordinator, prof. Kurt Bodewig.
- Organization of the event “Financing the maritime sector and MoS” together with the European commission (26/11/2019).
- Participation in international events related to SSS and MoS such as the Munich fair (Transport Logistics 2019), the MoS Forum, the Core Network Corridors Forum, the Joint Seminar organized by the European TEN-T Coordinators for MoS, the MED, and the Scan-Med Corridors in Madrid, the Adriatic Sea Forum in Ancona and MOST Italy.
- Participation to the 4th annual EUSAIR forum in Budva (7-8/05/2019).
- Participation of the MoS webinar “Shaping the Policy of a European Maritime Space” (01/07/2020).
- Upcoming organization of a national SPC event in Italy in late 2020 focusing on the SSS and the involvement of the national/EU stakeholders.
- Participation to EU projects on SSS.

Best Practices

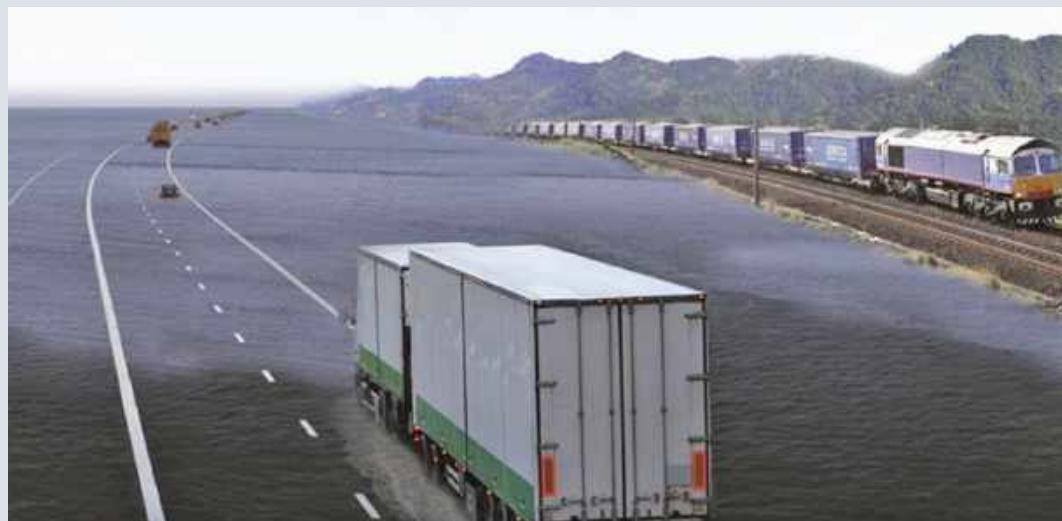
Marebonus /Ferrobonus and Med Atlantic Ecobonus project

- RAM/SPC Italy, acting as implementing body of the Italian Ministry of Infrastructures and Transport, has developed and is currently managing, the 2 national incentive schemes for sustainable multimodal transport Marebonus and Ferrobonus.
- 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. The results of the project were disseminated in various events towards the main stakeholders and the European Commission in order to elaborate the final report on the incentive with their feedback (in late 2019) which will be a tool to increase financial support towards sustainable multimodal transport in the MFF 2021-2027.



Focus 2021

- Lectures in specialized workshop dedicated to the promotion of SSS (Escola Europea SSS, lessons at Universities, etc.).
- Scouting of funding options for SSS projects in the 2021 – 2027 MFF and of new possible projects to participate in.
- Organization of a national event on the promotion of multimodal transport services in the Adriatic area in the framework of the INTESA project (Interreg IT-HR).
- Upcoming second phase of the revision of the MoS DIP in 2021.
- Participation to the consultation process for the upcoming revision of the TEN-T network.
- Participation to Maritime Spatial Planning (MSP) Activities and events.
- As SPC RAM will continue to send Newsletters to the stakeholders on the upcoming SSS events for 2021.
- Contribution to SPC's newsletter and papers.



The article “The involvement of SPC Italy/RAM in the European projects related to SSS and MoS” is available on request.

Contact:

SPC Italy

Prof. Francesco Benevolo – Managing Director RAM S.p.A

fbenevolo@ramspa.it

Ms. Arianna Norcini Pala – Head of European and National Programmes unit – RAM S.p.A
anorcinipala@ramspa.it



Main Actions 2019:

The Malta Shortsea Promotion Centre (MSPC) continued to be an active member of the Malta Maritime Forum and thus contributed to the consultations with the Government in the development of public policies that can have a bearing on the Maltese maritime industry.

MSPC participated in the Shortsea Shipping Days in Piraeus and the consequent meeting under the presidency of SPC Romania.

At the end of 2019 it was decided that MSPC will be amalgamated with the Malta Maritime Forum in order to have a more visible presence within the industry and at the same time facilitate its administration

Best practice:

- Until its shift within the Malta Maritime Forum, SPC Malta continued with its setup being now led by an executive management team and supported by an administrator providing back office services in one hand and thus improving response, focus and flexibility.
- Malta continued to follow up on the process of establishing ESN as a legal entity under Maltese law and regularly provides information as requested by the local authorities.
- As in previous years, SPC Malta provided the market with information through its monthly newsletters and meetings and the MSPC website,
- 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 2020

- SPC Malta intends to revamp its image following it's transition within the Malta Maritime Forum. This would include it's 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

Contact:

SPC Malta

E: info@shortsea.org.mt

W: www.shortsea.org.mt



Major activities in 2019

SPC-N focus on five areas in our work to reach decision-makers:

- Digital presence/Promotional activities
- Shortsea Business Workshops – creating valuable connections
- Decision support – Shortsea Schedules
- Consultancy
- European cooperation



Digital presence / Promotional activities

- Increased awareness and visibility of the Shortsea product through our digital channels.
- Weekly articles and social media presence
- Monthly newsletter
- Presentations at Transport & Logistics together with BAMA (Norway's largest fruit importer) and Samskip on how to move cargo from Road to Sea.)
- Presentation at the Norwegian Ports association seminar in august

Shortsea Business Workshops – creating valuable connections

- Workshop with Nordfrost GmbH in Stavanger and Oslo. Opportunity for the Norwegian maritime sector and cargo-owners. The concept a ferry route from Wilhelmshaven with facilities to support fresh food logistics
- Workshop with The Port of Antwerp in Stavanger and Oslo. Opportunity: The port of Antwerp had through interviews with 70 cargo-owners identified Norway as a strategic market for Shortsea (together with Portugal and the UK).

Decision support – Shortsea Schedules

- Monthly maintenance and updates of Shipping lines and services
- The database no consists of 77 liners, 928 services and 431 ports
- Shortsea Schedules had 100K+ visitors in 2019 with >360.000 pageviews. The users are professionals from all over Europe.

**Consultancy**

- Participated in a price structure project for Norwegian ports. The purpose is to establish a common price structure to reduce administrative costs for both shipping lines and ports and prepare for digitalization of vital processes.
- Assisted shipping lines in market potential analysis prior to establishing new shipping lines

European cooperation

- Monthly meetings and projects with Shortsea Promotion Centre Sweden
- Regular meetings with Shortsea Promotion Centre Germany, including a trip to Germany and visit members of the SPC. The trip resulted in the Shortsea Business Workshops with Nordfrost.
- Participated at the ESN-meeting in Athens
- Established the LinkedIn page European Shortsea Network as a common social page to share European Shortsea News. Status pr June-20 is 41 followers, 845 post impressions last 30 days.

Focus areas 2020

- Close cooperation and dialogue with SPC-N members
- Further develop SPC-N's digital presence
- Arrange 4 Shortsea Business Workshops
- Establish dialogue with cargo-owners for increased understanding
- Maintain and further develop Shortsea Schedules
- Strengthen cooperation with ESN-members and address common challenges

Contact:**SPC Norway**

Rådhusgata 25, 0158 Oslo
Postboks 1452 Vika, 0116 Oslo
Tlf.: (+47) +48 25 45 28
shortsea@shortseashipping.no
www.shortseashipping.no



MAIN ACTIONS 2019:

January 2019

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

APRIL 2019

- SPC organized and sponsored Conference " Short Sea Shipping 2.0 "

May 2019

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

September 2019

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

FOCUS 2020

- 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



Contact:

SPC POLAND

Sławomir Mańkowski

Shortsea Promotion Centre Poland

ul. Bytomska 7, PL 70-603 Szczecin

tel: + 48 91 4308321

email: biuro@shortsea.pl

Website: www.shortsea.pl



MAIN ACTIONS 2019

Conference APTMCD 2019 – SSS and Multimodality

This event took place in Porto, on March 28, with the presence of about 150 participants.

In a partnership with T&N – Transportes & Negócios, which regularly organizes the Seminar dedicated to Maritime Transport, the Agency held, in the morning, a panel under the theme “SSS and Multimodality”, moderated by the Vice-President of the Board, and with the participation of our associates MEDWAY, JOMATIR, and TARROS.

Port of Figueira da Foz Day 2019

As part of the Port Day celebrations, on October 30, the Agency participated in the Conference “Export Challenges”, a Port initiative to debate the potential and opportunities of the Port of Figueira da Foz, moderating a panel on intermodal transport in the central region of Portugal and the its impact on this port.

Escola Náutica Day 2019

The Agency sponsors two students from management courses of Escola Nautica, allowing them to attend the MOST Iberia training. On School Day, on September 26, the Agency Executive Director symbolically delivered the scholarships to the awarded students.



MOST Iberia 2019

With the sponsorship and participation of Intermodal Portugal, EE-IT – Escola Europea – Intermodal Transport promoted the MOST Iberia 2019 Course, dedicated to Spanish and Portuguese speaking professionals.

This training action took place during the trip between Barcelona and Civitavecchia, from 26 to 29 October, with the participation of 7 Portuguese trainees.

**T&N CARGO Awards – Best ShortSea Shipowner 2019**

The Agency sponsored another edition of the T&N CARGA award, with the delivery of the award to the “Best ShortSea Shipowner” in 2019. This year, the prize was won by CLdN.

Shipping Dinner 2019

In order to promote the network of contacts and strengthen the relationship of the various entities and respective representatives involved in the shipping area, AGEPOR, APAT and T&N held the first “Shipping Dinner”, which took place in the city of Porto, on March 27.

Shortsea Shipping Days 2019

The “Shortsea Shipping Days 2019” Conference was held in the port city of Athens on June 13, which brought together European participants linked to ports and SPC, port equipment manufacturers, service providers and Greek and European public entities.

ESN Annual Meeting 2019

On the same day, June 13, in Athens, an ESN meeting was held to review the activities of this association that brings together the various national SPCs, as well as to articulate the activities to be carried out by the end of 2020.

New APTMCD members

During the year 2019 APTMCD has two new members: MSC Portugal and JOMATIR.

It should also be pointed out that the latest members are from private operators, demonstrating that the market and economic operators are increasingly sensitive and alert to the theme of intermodality.

Contact:**SPC Portugal**

Eduardo Bandeira – Executive Director

APTMCD – Intermodal Promotion Centre Portugal

Rocha Conde d’Óbidos, Edifício Gare Marítima – 1º Piso

1350-352 Lisboa

PORtugal

www.shortsea.pt



Activities within the European Short Sea Shipping Network (ESN)

Starting with January 1, 2019, RIA took over the presidency of the European Short Sea Shipping Network (ESN), coordinating the communication between the network members and its activities. During the reporting period, the RIA representative participated in a meeting of ESN in which its activities and ways to improve them were discussed.

Within ESN, RIA kept formulate views on its main steps in communicating with the European Commission, but also to receive from it legislative proposals on which to formulate opinions, as appropriate.

The mentor project

- The MENTOR project – Blue Career Center of Eastern Mediterranean and Black Sea, EASME / EMFF / 2016 / 1.2.1.2. / 06 / S12.749365-MENTOR, brings together 7 partners from 4 countries in the Eastern Mediterranean and Black Sea area, including in the European Union's funding programs aimed at Blue Economy strategies.

On November 8, 2019, RIA representatives co-organized the third edition of the Career Fair organized by the Constanta Maritime University.

- The Career Fair aims to help facilitate the insertion of students into the labor market, making possible the concrete interaction between potential employers and the local workforce. Young people looking for a job thus had the opportunity to discuss with employers' representatives to find out what employment opportunities are currently available and to benefit from counseling in their chosen career. They have the opportunity to be admitted to real internships, which will support them in their further professional development, or to engage in the field of interest.

Actions in other European/regional projects

Danube Skills, Green Danube, DAPHNE Project

Maintaining communication with the maritime and port community

RIA continued to stay in touch with important actors in the field of intermodal transport, addressing issues such as involvement in conducting studies and periodic reviews on the inclusion of the Port of Constanta in multimodal transport routes.

For a better cooperation and an easy interaction with the interested stakeholders, a new RIA website was created, much easier to access by the visitors.



Also, the RIA representatives promoted within the Romanian maritime community the European concerns and potential legislative issues by sending notifications to the stakeholders in the logistics and multimodal field.

Focus 2020

- Create a LinkedIn Page to keep in touch with interested parties and easily share news, update the website and the others social media pages
- Active participation in the ESN network exchanging best practice and strengthen cooperation with ESN members
- Improve the collaboration with logistics and multimodal field

Contact:

SPC-Romania

Nicoleta Acomi, President, nicoleta.acomi@gmail.com

office@ria.org.ro

www.romanianintermodalassociation.org



MAIN ACTIONS 2019

- **Annual SPC-Spain Conference:** The 2019 Conference “Innovation in the Short Sea Shipping (SSS), for more competitive and sustainable transport” was held in Cartagena, on 20 November, and brought together about 100 representatives of companies and institutions directly related to the SSS. The conference was opened by the State Secretary of Infrastructure, Transport and Housing, and its topics were:
 - IMO 2020 just around the corner: Alternative fuels.
 - What do road freight companies ask the SSS to use it? Requirements and conditioning factors for the perishable flows.
 - Technology and Innovation at the service of a most efficient SSS.
- **Institutional meetings with governmental entities and political representatives.** SPC Spain presented proposals for:
 - Allowing the use of open loop scrubbers in the Spanish ports
 - The new Strategic Framework of Spanish Ports System
 - Preliminary draft of the amendment of the Ports Law to adapt it to EU Regulation 2017/352 about port services.
 - Improving the effectiveness of Border Inspection Services in ports.
- **SPC Spain took part on 12 December in the COP25** held in Madrid, explaining how the SSS contributes decisively to the sustainability of transport and the planet decarbonisation.
- **Participation in ESSF's plenary and SubGroups meetings.** SPC Spain is member of the 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 three conferences in different Spanish cities to promote maritime – land intermodality, focusing on the needs of shippers, logistic operators and road hauliers.
- Weekly newsletter with SSS related news.
- SPC Spain's presence in specialized media with articles and interviews.
- Continuous website updating

Knowledge & monitoring of the Short Sea Shipping activity

2019, SPC Spain launched two issues of the Spanish Shortsea Statistical Observatory, 2018 Annual Edition, 2019 first half advance.



Best Practice

IMO Marine Environment Protection Committee (MEPC 74). Special treatment for SSS in measures taken to reduce CO2 emissions from ships.

At the request of SPC Spain, the Spanish Maritime Administration formally presented at the 74th meeting of the IMO Marine Environment Protection Committee (which took place at the IMO headquarters in London from 13 to 17 May 13) the proposal to give a differentiated treatment to the SSS in the measures adopted to reduce CO2 emissions from ships. SPC Spain considers that this one is a very interesting proposal for the SSS, not only in itself, but as a precedent to consider the exceptional nature of SSS when establishing other new ship-ping regulations in the IMO.

Brittany Ferries enlarges its MoS services linking Bilbao port with the Irish port of Rosslare

Brittany Ferries now offers 9 weekly connections between Spain and the UK: 5 from Bilbao and 4 from Santander. Several months ago, it started a new connection Spain-Ireland linking the Bilbao and Rosslare ports.

In total, BF offers hold space for 2100 trucks per week, more than 100.000 trucks per year avoided on the European roads as well as their external costs.

FOCUS 2020

- **Annual Shortsea Conference 2020:** will be held in Barcelona on 26 November.
- **Training Activities:** To promote maritime – land intermodality, Spanish General Directorate of Land Transport granted funds to SPC Spain to develop four training programs in 2020 focusing on the needs of shippers, logistic operators and hauliers.
- **Knowledge & monitoring of the Short Sea Shipping activity:** During 2020, SPC Spain will launch, due to COVID crisis, four (instead of the customary two) issues of the Spanish Shortsea Statistical Observatory.
- **Cooperation with Public Administrations:**
 - To take advantage of the amendment of the Ports Law to improve the SSS treatment related to the port fees and tariffs.
 - To contribute to the new Law of Sustainable Mobility creating instruments and procedures to support and promote SSS.
 - To cooperate with Puertos del Estado to improve the effectiveness of Border Inspection Services.
- **Recruiting new members**

Contact:

SPC SPAIN

Pilar Tejo

SPC Spain - Calle Cronos nº 63, 3º
of. 6. 28037 Madrid Spain

Tel + 34 91 304 13 59

e-mail: info@shortsea.es

Main activities 2019

Doctrine & main policy

SPC Sweden has aligned its main objectives and activities with the overriding transport strategy adopted and enforced by the Swedish Government and relevant Swedish Governmental Authorities. This strategy dictates a policy related towards electrification and increasing the share of renewable energy that must be complemented with a modal shift of freight transport from road to rail and sea.

Focus areas

- Knowledge sharing and competence development
- Collaboration
- Intermodality
- Practical modal shift i.e. realisation of shifting cargo from road to rail and sea
- Research and innovation

BCO Dialogues

A prioritized activity of SPC Sweden has been regular dialogue meetings with BCO's (Beneficial Cargo Owners) jointly with Ports and Shipping Companies. These half-day meetings have combined basically all focus areas (see above) in a round-table collaborative environment with surprisingly good results. Many meetings have resulted in further collaboration efforts either in pilot or project format and in one instance to the set-up of a completely new route. In total almost 100 BCO has enlisted themselves to attend and support our BCO Dialogue.

Practical modal shift

In total three new intermodal ShortSea routes have been established to and from Sweden;

1. Halmstad - Helsinki; a weekly liner service that commenced in April 2019 by Containerships offering customers 45` pallet wide containers thus avoiding overland transport thru Sweden with a ferry connection on the Swedish east coast.
2. Gdynia - Helsingborg - a twice weekly container service operated by Unifeeder with commencement July 2019. This intermodal concept, offering intermodal rail connection both in Poland and Sweden combined with 45` pallet wide containers, seems to appeal to a number of customers.
3. Gdynia - Norrköping; basically the same concept as 2, also operated by Unifeeder.

It should be noted that route 1 above was materialized thanks to an eco-bonus introduced by the Swedish Transport Administration and endorsed in Brussels.

We have estimated that these three new routes combined generate an annual turnover of approx. 1500 x 45` pallet wide containers. Each with a Co2-emission 245 kos less than road transport thus

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SWEDEN**

with a total Co2 emission reduction of 3,675,000 kos. A genuinely practical best practice case! Several studies have been made for additional new routes especially to and from Iberia and Central Europe (notably Poland, Germany and the Baltic States).

Intermodal SPC Network – Baltic Corridor

Together with other SPC partners around the Baltic Sea we are seeking to establish a competent network that can facilitate support to parties whom are interested to set up new intermodal ShortSea routes. We have a firm conviction that the Baltic Corridor will expand in size and importance over the next coming 3-5 years and are keen to play a constructive role in this area. In this relation we have participated in the following forums;

- 6th Railway Forum in Berlin
- EU InterReg Project South Baltic Sea in Berlin

Research & innovation

SPC Sweden is actively involved in three research projects funded by the Swedish Transport Administration;

- Logistic procurement from a sustainable perspective (Phase II)
- Digital support in calculating transport emissions (pilot project)
- Digitalisation as an enabler for intermodal ShortSea

All three research projects are conducted in collaboration with various Swedish Research Institutes and Academies to ensure that the research meets high expectations. We are also open to international collaboration and interested SPC's in Europe are welcome to contact us.

Promotional activities

Establishment of a SPC-S LinkedIn page to share news and potentially provide regular newsletters.

European cooperation

Regular meetings held with SPC Norway to exchange activities and experiences. Recent attendance in digital workshop organised by SPC-D.

Contact:**SPC-Sweden**

Lars G. Green

Project Manager

Mobnr; +46 70 565 2505

lars.green@greenconsultinggroup.se



Main actions 2019:

SPC Turkey's secretarial duties have been undertaken by the Istanbul & Marmara, Aegean, Mediterranean, Black Sea Regions Chamber of Shipping (IMEAK Deniz Ticaret Odası) as being the promotion centre's secretariat. Our yearly industry oriented educations/seminars, which of these most topic subject given to our members such as follows;

- Container Shipping, Bill of Lading and Seawaybill,
- Maritime Future -Autonomous ships,
- International Safe Management Code Practices and Inspections

Best Practices:

- Maritime Business Dialogue meeting was held in Turkish Chamber of Shipping /İstanbul -Turkey on 1st March of April 2019 with the participation of EU Delegations, Republic of Turkey, Ministry of Transport and industry stakeholders to discuss EU transportation developments and future agenda



**Focus 2020:**

- 2020 educational agenda to be followed on basis subjects as industry topics.
- Cooperation with Delegation of the European Union to Turkey and National Institution in order to funding green shipping industry.
- Maritime Nation and a Maritime Country idea/project competition for maritime transportation, maritime trade, shipbuilding and yacht building, marine tourism, maritime resources, ports, logistics, maritime training, and employment.

Contact:

SPC Turkey

Mr. Serkan INAL

Manager, Marine Safety and Shortsea Shipping

Meclisi Mebusan Str.Fındıklı,Istanbul, Turkey Post, P.O.Box 34427 Tel: +90 212 252 0130

E-mail: serkan.inal@denizticaretodasi.org.tr Website: www.shortsea.org.tr