



## Annual Report 2004

### Introduction

In the course of the 2<sup>nd</sup> activity year under the 2<sup>nd</sup> business plan 'SSS 2003-2005', work continued, based on four pillars:

1. Taking and/or promoting concrete initiatives;
2. Locating bottlenecks in shortsea shipping (SSS) and take action to solve them;
3. Developing the European dimension of SSS and networking;
4. Promoting SSS generally.

Guidance of the market prospector and assistant market prospector continued to run through the core team and the SSS working group; the core team met 5 times, the working group 4 times. In those cases where quick action was necessary, e-mail and fax were also used to make inquiries with the core team. Within the working group a subgroup tackled a list of bottlenecks for SSS.

Although the activities displayed by the promotion centre all related to the four pillars mentioned, some specific actions nevertheless stood out:

***The upgrading of the centre's own website with a regularly supplemented news section.***

***The launch of an electronic newsletter.***

***The organisation of a workshop aimed at road transport, together with the SPC Portugal. In general, the contacts with that target group grew more intense.***

***The 'Transit' brochure, an ESN project co-ordinated by Flanders.***

***Strong involvement in the European Shortsea Network.***

***Particular attention to the new member states of the EU (including participation in workshops in Lithuania and Malta, and the publication of the Baltic States Special).***

***Attention to political measures. Anticipating on the LKW-Maut, for instance, a country special was made on Denmark and the Baltic States.***

***An SSS memorandum was sent to the new members of the Flemish Parliament.***

***The information towards the target groups was presented in as practical a way as possible by using 'best practices', both in the newsletters and on the website.***

In the reporting we follow the four pillars and their items as mentioned in the business plan.



## **1. Taking and/or promoting concrete initiatives (the 'fieldwork')**

### ***a. ESN database of regular liner services***

A third grant obtained from the European Commission made it possible to upgrade the ESN Website and database. A number of technical improvements now enable the promotion centres to make adjustments themselves and to place, for instance, Flemish success stories directly on the website by their own initiative. The database has been adapted also, putting the promotion centres in charge of the basic information on shipowners, agents and liner services, the location of the shipowner's headquarters being the decisive factor. The responsibility for the data concerning countries that do not have a promotion centre has been spread over other countries (Flanders, for instance, covers Rumania). At the end of 2004 the promotion centres have launched a complete screening and overhaul of the information database. Both the website and the database are, indeed, important tools to corroborate the European dimension of SSS towards all target groups.

In 2004, 16,800 'unique' users visited the ESN [website www.shortsea.info](http://www.shortsea.info). From our own SSS website 2,072 users clicked through to ESN. That represented a decrease compared to the year 2003 (2,908 through-clicks) but can be explained by a more intensive propagation of the ENS website itself, leading to more direct consultations.

### ***b. Participation in projects /test cases***

Of the three projects/feasibility studies we contributed to in 2003, one has been partially realised. Research into the goods flows between the United Kingdom (UK), Flanders and Poland, has incited, in 2004, already one shipowner to install a route between the UK and Poland. Other possibilities (i.e. including a Flemish port) are still being examined by that shipowner. Once again it becomes clear that a certain equilibrium of exports and imports is needed to be able to start up an SSS liner service. In 2004 we have been contacted about the possibilities of a ro-ro service between Flanders and (one of) the Baltic States. Currently the road haulage tariffs of the Baltic firms are too low and a lot of merchandise is still shipped from Flanders on an ex-works basis. The entry into the EU should in the long run lead to changes in that respect (e.g. because of rising wage costs).

### ***c. Specific issues***

Next to answering specific questions from the market (by e-mail, fax, telephone or direct contact), the reinforcement of the SSS team also made it possible to put more work into active prospecting. The possibility to use a 'teaser' in that respect is under examination. Our own database has been updated regularly: an increasing number of agents and shipowners keep us informed of any changes.

The list of shipping offices for ad-hoc shipments is requested regularly also.

From those contacts we try to draw interesting practical examples and success stories, which – with the consent of the parties concerned – are then published, in order to convince others.

In 2004, a total of 120 files were handled, related to all those specific issues. Some 25 information packages were sent out as an introduction after a first contact (on trade fairs etc.).

Since the beginning of the economic crisis more people are concerned about the logistic element in their overall transport chain. The shippers, in particular, see it as an important item, that partly determines their competitive position. Measures such as the LKW-Maut and large-scale road works have set a number of shippers thinking. The fact that, despite the crisis, the figures of SSS continue to rise, is extremely significant.

### ***d. Follow-up of files***

Here too, the reinforcement of the SSS team has a favourable effect, since more time can be spent on the follow-up of the files. In this respect it is important to realise that this way we sometimes learn why a particular 'modal shift' didn't take place. This, in turn, can stimulate further action. Half of the files are subjected to a follow-up more than once.

### ***e. Supply side***

Owing to the fact that our role as a neutral promotion centre has become more widely known and that our newsletter and website are excellent notice boards for new initiatives and SSS services, we are being sent information, e.g. through press releases. Any information that may be lacking in our database is applied for.



## **2. Locating bottlenecks in shortsea shipping (SSS) and take action to solve them;**

A number of bottlenecks hampering SSS continue to exist and are further acted upon.

Consultation with the Flemish Region, which already started in 2003, was continued. Together with the Flemish Nautical Authority, a close look was taken at the Flemish SSS policy and a number of strategic lines have been plotted.

The coasters' running-in expenses to the ports have also been scrutinised further: the possibility, under particular circumstances, of an extension of the pilot exemption was examined. The investigation continues in 2005.

Measures taken by the Flemish ports to cut the port costs for coasters are being stressed in presentations and press articles.

A task force of the SSS Working group discussed the 'bottleneck exercise' of the European Commission (April 22).

Within the framework of the Maritime Industries Forum (MIF) assistance was given to an update of the 'bottleneck' exercise and persistent attention is paid to the document flow issue. The European Commission's Vademecum, containing an inventory of simplified shortsea customs' procedures, has been distributed further.

The sea-river traffic on the Albert Canal and the Gent Maritime Canal remains a problem: during the last quarter of 2004 a survey was started into the possible causes of the decline. The findings will be discussed with the waterway managers in 2005.

Any positive developments are mentioned in our newsletter, e.g. the laying of the foundation stone of the new 'boulevard' bridge in Boom, a first step in the elimination of the existing bottleneck caused by the bridge pillars.

The situation of the clearance under the bridges of the Albert Canal is also being followed-up.



### **3. Developing the European dimension of SSS**

#### **a. *European Shortsea Network***

The network continued to expand in 2004 and now officially numbers 16 members: Finland, Sweden, Norway, Lithuania, Poland, Germany, the Netherlands, Flanders, Ireland, the United Kingdom, France, Spain, Portugal, Italy, Denmark and Greece. By their entry into the EU, Lithuania and Poland became full members (there are currently no 'associate members'). At the end of September, Malta attended for the first time as an 'observer'. Despite the fact that the European Commission in its 'focal points' keeps stressing the need to set aside the necessary financial means in each country, the network has been confronted with promotion centres experiencing financial problems. Denmark suspended its activities already in the beginning of 2004 and France became a 'dormant' member in the second half of the year.

Notwithstanding those setbacks, ESN has been very active in 2004. A number of bilateral workshops have been set up: on October 26, Portugal and Flanders joined hands to organise a workshop to throw light on the synergies between road and shortsea (with 158 participants a successful venture).

The third (and last) Grant from the European Commission was used to create a new website ([www.shortsea.info](http://www.shortsea.info)) and to renew the technology behind the European database for liner services.

An ESN application for 'common learning' under Marco Polo was finally not taken into consideration.

Six promotion centres (Finland, Sweden, the Netherlands, Poland, Flanders and Italy) have concluded a mutual agreement to assist new centres in their take-off phase. A request for such a tutoring project has been introduced and this time the Commission agreed to back such activity financially. Lithuania, Malta, Cyprus, Slovenia and Latvia are the newcomers that are receiving assistance and will also get financial start-up support. The project runs up to the middle of 2006.

During the Irish presidency (January-June) the first ESN Yearbook was compiled and distributed. This initiative met with a wide response in the (European) press.

The Netherlands, who acted as president of the EU and the ESN in the latter half of 2004, placed shortsea shipping high on the EU agenda.

In addition, in 2004, ESN increasingly turned towards the market. Promotion centres joined hands to approach 'Euronationals' in order to promote SSS. On ESN's website we are now able to post practical examples ourselves.

Thanks to its wider notoriety, ESN is increasingly invited as a contributor to workshops and conferences. In order to save on expenses, the local promotion centre is usually delegated, although the centre with the largest experience may also be sent. Thus we contributed to a presentation on 'best practices' at the Wista conference in Rotterdam (September).

Contacts with the MEPs of the Transport Commission were made through ESN. A meeting scheduled in Amsterdam had to be postponed because of agenda problems of most of the members of parliament. Work is undertaken to organise such a meeting in 2005 in Brussels.

#### **b. *Other networking***

The contacts with the European Commission, on the one hand, and with organisations such as ECSA (European Community Shipowners Association), ESPO (European Sea Ports Organisation) etc., on the other, remain intense.

Within the MIF (Maritime Industries Forum) the Promotion Centre co-operates towards the further development of SSS.

The existing contacts with ports, authorities etc. are maintained, both through the SSS working group and otherwise.

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Export Vlaanderen continues to be an important partner. With its representative in Lisbon, for instance, the already mentioned workshop with the haulage industry was set up. We also took part in the export events Baltic-Eastern Europe (June 15) and Southern Europe (December 7).

Moreover, we had the opportunity to give a presentation on SSS to the assembled economic representatives in Brussels (June 18). Export Vlaanderen also supplies the input for the country specials.

In 2004 the contacts with the road transport companies continued on an individual basis.

At the end of 2004 the Flemish Logistics Institute (Vlaams Instituut voor Logistiek – VIL) took the initiative to compound a modular Powerpoint presentation, which can be used on missions (of Flanders Investment and Trade (FIT)). The aim is to present each of the players who are important for Flanders as a distribution region on a couple of slides. These slides may also be hiding a more extensive presentation which can be used if helpful. The project will be elaborated further in 2005.

Together with BCE (Baltic and Eastern Europe) Network the idea was launched to organise, with EU support, a workshop aimed at Eastern Europe. Yet, the E.C. opted in favour of a large-scale conference with big names. Since BCE was discontinued at the end of 2004, the conference project was given up also. However, the idea was taken up – albeit on a smaller scale and on a Flemish level – by the Flemish Waterways and Maritime Administration (AWZ) and Ernst & Young to be further developed in 2005.

Together with Promotie Binnenvaart Vlaanderen (PBV), the Promotion Centre takes part in the working group Market Research (5 meetings).



#### **4. General promotion of SSS.**

The pure promotion of the transport mode as such remained a necessary factor in 2004, both towards the main target groups (shippers) and the general public. The road works around Antwerp gave rise to continue such pure promotion (next to more specific publications).

##### **a. *Own publications***

###### **1. *Own website [www.shortsea.be](http://www.shortsea.be)***

The Flemish Promotion Centre's own website was visited 18,796 times in 2004, an increase of no less than 84% compared to 2003 (10,231). In the middle of 2004 the website was given a face-lift and update (a specific action point for 2004): the section were arranged in a more logical order, new sections ('Youngsters') were added, the news section became already visualised on the front page. Those new elements strengthened the appeal of the website considerably, resulting in an increasing number of visitors.

###### **2. *Leaflet/Brochure SSS***

It has been decided, in the course of 2004, not to replace the obsolete and pedantic SSS introduction brochures. For SITL a leaflet (A4 – recto verso) was produced in a limited number of copies, offering the advantage that ad-hoc and 100% up-to-date information could be incorporated. Also, the renewed website was promoted as an introduction medium to the Promotion Centre and SSS.

###### **3. *Country specials***

Due to the uncertain fate of our Danish colleague (with whom we wanted jointly to produce the special), we took the publication of the Denmark special completely in our own hands.

In the autumn the Baltic States special was distributed (Estonia, Latvia, Lithuania).

Both specials were drafted with a specific reference to the introduction of the German Maut, which should induce the shippers and their logistics people to reconsider their logistic chain.

Of those specials 6,000 copies were distributed. As far as text copy and figures were concerned, Export Vlaanderen gave a considerable input. The specials are produced simultaneously in a Dutch and English version.

###### **4. *NV Binnenvaart***

In this magazine a number of editorials were included on, amongst others, SSS statistics, the brick traffic on the Albert Canal, the conference on SSS-haulage synergy in Lisbon. The annual report of PBV included an insert on SSS also.

###### **5. *Newsletter***

The newsletter remains our main publication aimed at the players on the market. Because of its impact, as many practical examples as possible are included. The information on new services also appears to appeal. The newsletter is published 4 times a year in a separate Dutch (5,000 copies) and English (1,000 copies) version.

###### **6. *Electronic newsletter***

April saw the start, as one of the action points for 2004, of an electronic newsletter in which a number of news items are mentioned with reference to the website for full information. This newsletter consists of a Dutch-English version and is distributed at the end of each month. At the end of 2004 the electronic newsletter was sent out to 126 e-mail addresses. With this version we try to bring other news than in the printed newsletter with the clear intention of keeping abreast of current affairs.



## **7. Transit brochure (with ESN)**

Ten promotion centres have gathered the shortsea possibilities (North-South and vice versa) to carry out pure transit through Belgium (which doesn't yield any added value) by SSS. Next to those services, the possibilities offered by the Flemish ports and, subsequently, the regular inland services towards the hinterland, were also highlighted. This 'Transit' brochure was distributed on 6,500 copies (also via ESN) under the title 'Transit cargo through Belgium ? Think Shortsea !'. It was distributed just before the start of the road works around Antwerp. The subtitle 'Streamlining your modal shift from road to sea.' Illustrated its wider purpose.

### **b. General promotion and communication**

#### **1. Articles in other publications**

The attempts to encourage as many free advertorials and editorial articles as possible continued in full force. We obtained a response in the trade press on such subjects as the statistics over 2003 and the first half of 2004, the brick traffic on the Albert Canal, the Transit brochure etc. We issued four press releases and wrote the advertorials in Made in Belgium, Export Services etc. ourselves. The list of press contacts is adapted regularly.

#### **2. Advertisements**

In co-operation with BeMedia advertisements were placed in both the specialised press and in magazines aiming at shippers and logistics managers.

#### **3. Waterpower mosaic**

Cartoons are still being used as a communication tool towards both the market players and the general public, schools etc.

#### **4. Address file**

The address file was subjected to a thorough check-up at the end of 2004 and adapted on the basis of a reply form. New contacts have been included. After the check-up the file includes 4,905 Dutch-speaking and 1,008 English-speaking addressees.

#### **5. Trade fairs, seminars, workshops, presentations...**

Trade fairs and seminars are not only there to visit or to participate in, they also offer the opportunity to make contacts. Wherever possible a short presentation of SSS is made and documents are placed at the disposal of the participants. The Export Days of Export Vlaanderen are particularly interesting in that respect, because they are visited by the shippers.

**Chamber of Commerce Geel : meeting Project Cargo (January 16).**

**SSS presentation for Sealift (logistic co-ordination centre of the armed forces of European Armies) (February 3).**

**Workshop Pilotage (February 11 and November 24).**

**Belgian Boatshow : Information day for schools (February 12).**

**Information day Export Vlaanderen (February 19).**

**Participation in the Zeebrugge harbour day in London (March 5).**

**Workshop Taix Lithuania (March 4-5) : presentation SSS.**

**Participation in SITL Paris (March 9-12).**

**Participation in the Road Works Forum Antwerp (March 23): mention of the transit brochure + evaluation meeting (December 23).**

**Participation in the general assembly of the Antwerp Shipping Federation ASV (March 25).**

**Participation in the Gent harbour day in Lille, France (March 26) : presentation SSS.**

**Participation in the workshop 'Hinterland links' (University of Antwerp) (April 1) : presentation SSS.**

**Participation in the seminar SPC UK Manchester (April 6) about SSS in the U.K.**

**Participation in the BCE workshop 'Co-operation between Belgian and East-European companies' (April 7 and June 14).**

**Participation in the ISPS workshop (Antwerp) (May 4).**

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*Venue Zeekanaal (Wintam) (May 4).*  
*Visit to the B2B contact days in Antwerp (May 6).*  
*Participation in a workshop 'Motorways of the seas' in Rotterdam (May 11).*  
*Participation in a ro-ro conference in Göteborg (May 25-27).*  
*Participation in the Export Days Baltic and Eastern Europe (Export Vlaanderen) (June 15).*  
*Workshop Export Vlaanderen : SSS presentation to economic representatives (June 18).*  
*SSS working group visit to the port of Liège: presentation SSS.*  
*Vlaams Instituut van de Zee (Flemish Maritime Institute) (Oostende) : presentation SSS (August 5).*  
*Wista conference in Rotterdam : presentation SSS (September 8).*  
*Discussion platform 'Flanders Logistics' (VIL) : participation.*  
*Participation in the Gent port mission to Norway (September 20-24) : presentation SSS.*  
*Workshop Taix Malta (October 14-15) : presentation SSS.*  
*Port Management, University of Gent (October 20) : presentation SSS.*  
*Participation in an afternoon workshop on "The impact of Europe on the Flemish maritime ports", organised by Serv( October 20).*  
*Organisation of a workshop SSS-road haulage in Lisbon, together with Portugal and Export Vlaanderen (October 26) : presentation SSS.*  
*Gent Polytechnic (November 22) : presentation SSS.*  
*Participation in a seminar on Bulgaria (Chamber of Commerce) (December 1).*  
*Participation in the Export Days Southern Europe (Export Vlaanderen) (December 7) with a short SSS presentation.*  
*Participation in a project 'Flanders Distribution Region' of the Flemish Logistics Institute (December 8) : SSS slides in modular presentation.*  
*Workshop 'Motorways of the seas' (AWZ-Brussels) (December 10).*  
*Participation in a forum on transport chains and models (December 14) : contribution to a paper.*

## **6. Contacts with embassies and consulates**

Our publications are sent out to all embassies and consulates of coastal countries.  
We took part in a meeting of shippers with the Rumanian ambassador in the Chamber of Commerce (May 26).

### **c. Communication towards other target groups**

#### **1. Schools and the general public**

The 'Waterpower Mosaic' cartoon continued to be distributed in schools and among the general public, as well as on fairs such as 'Belgian Boat'. The 'Waterpower' cd-rom was also used regularly.

SSS co-operated as regards content (no financial input) in the joint 'Areyouwaterproff' action, which aims at rousing the interest of youngsters for a job on the water. The commercial was shown once again in the cinemas. Assistance was given to 'Ostend at Anchor' and 'Sail' in Antwerp, in the form of an information stand boasting two large buoys.

Contacts were maintained with the universities of Leuven, Gent and Antwerp: SSS presentations were given, students developed SSS-related subjects etc. There are regular contacts also with the Gent and Antwerp Polytechnics and the Karel de Grote-Hogeschool. These usually involve an SSS presentation and/or discussion with shipping/logistics students.

16 students made inquiries about SSS for their final paper or thesis. The Promotion Centre acted as promoter or commissioner for a number of final papers of participants in the Port Management course in Gent.

#### **2. Portcentre Lillo**

On June 5 the refurbished Portcentre in Lillo was reopened. Together with Promotie Binnenvaart Vlaanderen and OPVN, Promotie Shortsea Shipping Vlaanderen has an interactive information packages stand there. The target group are the youngsters in higher secondary education. We provide information packages, cartoons and cd-roms for the accompanying teachers.



## 5. Miscellaneous.

The Promotion Centre is keeping in touch with the Flemish Logistics Institute through three working groups (Intermodal transport, Flanders Distribution Region and Tracking & Tracing). The contacts with the other members of the working groups are often useful for networking. Sporadically we also take part in activities of the Chamber of Commerce.

## 6. Continued activity.

In the course of 2005 it will be decided whether the existing business plan 2003-2005 will be extended (possibly with some readjustments), or whether a new plan will be drafted for 2006-2008. In the latter case, the third year will also be the tenth year of activity of the Promotion Centre.

Annexes (to be added)

**Figures 1999-2004**  
**Time spending**