eMaritime Initiative: On Common European Maritime Space

"I believe open markets and equal treatment for all market players are necessary conditions for the continuing development of maritime transport. I am committed to fighting administrative, legal and political barriers by supporting smart innovative solutions. Work on the e-Maritime concept and on inter-modal intelligent transport solutions will be a particular priority for my work in the coming years." **Siim Kallas**, *Vice-President of the Commission responsible for Transport*

Main: Extends the Common Market to Sea transport; Requires a change in existing regulations, supported by electronic data exchange systems. Short term measures: Simplification of customs formalities; Guidelines for speeding-up checks relating to animal and plant products; Simplification and harmonisation of administrative formalities for vessels at EU ports. Medium term measures: Vessels having a call in a third country; Deployment of eMaritime systems; Intermodal carriage of dangerous goods; Administrative single window.

European Maritime Transport Space without barriers (COM 2009 10 final of 21 January 2009).

e Maritime initiative

"eMaritime is working and doing business in the maritime sector with the support of internet based applications. The EU eMaritime initiative will embody policies, strategies and capabilities facilitating the development of "eMaritime" services. The EU eMaritime initiative is aimed at fostering the use of advanced information technologies for working and doing business in the maritime transport sector.
The EU eMaritime will focus on promoting interoperability between all stakeholders in the maritime transport sector including ports, shipping, inland waterways, logistics and administration authorities.
eMaritime initiative component: The eMaritime Strategic Framework; The eMaritime Support Platform;
The eMaritime Applications: Administration Applications, Ship Operation Applications, Port/Terminal Applications, Transport Logistics Applications. Administration Domain: Applications as National Single Windows for ship and cargo reporting integrated to SSN; Port Operations: as Port Community Systems & Port Single Window; Shipping Operations: as Short Sea Shipping Integration into Logistic chains. As early as possible and at the latest on 15.02.2013, all information will have to be channelled through an electronic National Single Window.

DG MOVE C2 Unit, SKEMA Project Consortium

e Freight Initiative

"eFreight initiative denotes the vision of paperless freight transport processes where an electronic flow of information is linked to the physical flow of goods. eFreight initiative was introduced as a means to support electronic exchange of information in business to business, business to administration and administration to administration relations. A key action has been: "to develop together with stakeholders, a roadmap for the implementation of eFreight, expanding on the concept of the "Internet for cargo".
eFreight Platform: The eFreight platform will deliver integrated software capabilities for building, customising, integrating, running and managing: eFreight market places; Transport chain process management applications; Next Generation National Single Windows incorporating the Single Transport Document.

DG MOVE, e Freight Project Consortium

e Customs Initiative. Customs Single Window

eCustoms Decision: Decision on the paperless environment for customs, trade and transport. Obligation to develop and make IT systems; Allocation of tasks between MS and Commission; Specific legal acts for individual IT systems. Main - Customs Single Window Project.
The eCustoms - electronic customs initiative - aims at establishing secure, interoperable electronic customs systems for the exchange of the data to: Facilitate import and export procedures; Reduce compliance and administrative costs; Improve clearance times; Coordinate the approach to the control of goods and application of the legislation; Ensure proper collection of Community duties and charges; Enable a seamless flow of data between the parties involved and allow re-use of data.

e Customs Decision

e Port. Port Single Window. Port Community System

"Although port authorities continue to be important players, their role has changed. Other stakeholders such as terminal operators, shipping lines, logistics providers and the surrounding community are increasingly gaining in importance. In port communities the different stakeholders involved in port business, have started cooperating closely with each other and the port authority with a view to optimising internal port processes and making the port more efficient. The common target shared by stakeholders in the port community was to attract as much cargo as possible. The port community was characterised by little cooperative interaction and strong competition between different ports."

The Evolving Role of EU Seaports, Study DG for Internal Policies

"Port Community System and Port Single Windows used to be part of strategy of port. Nowadays they are becoming a commodity. Integration between authorities and ports, both at national and multinational level is the issue. This is real strategic target for the coming future."

Oscar Diaz, *Director of Innovation and Engineering, Portel S.A*

e Navigation Strategy

"e Navigation is an International Maritime Organization led concept based on the harmonisation of marine navigation systems and supporting shore services driven by user needs. eNavigation is currently defined as: "eNavigation is the harmonised collection, integration, exchange, presentation and analysis of maritime information onboard and ashore by electronic means to enhance berth to berth navigation and related services, for safety and security at sea and protection of the marine environment".
eNavigation is a broad, long-term, concept, involving many stakeholders and having the potential to impact on the entire maritime community."

IMO e-Navigation Strategy

Black Sea Single Window Initiative

e Maritime Applications

Administration Applications, Ship Operation Applications
Port/Terminal Operations Applications, Transport Logistics Applications

e Maritime Organizations

To Black Sea Port Community Systems
To Black Sea Port Community Windows, To Black Sea National Single Windows

Shortsea & Inland Shipping
Intermodal Promotion Centre Bulgaria
9000 Varna, Bulgaria, P.O. Box 2, Tel./Fax: +359 52 60 10 11
www.shortsea.bg, e-mail: office@shortsea.bg; shortseabg@yahoo.com

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Black Sea
e MARITIME SUMMIT

High Level Meeting of Black Sea
Maritime Administrations and Maritime Organizations

Bulgarian Maritime Day 2010

e Maritime Applications: Port Community Window, National Single Window
e Maritime Organizations: Port Community Systems

With support of:

Ministry of Transport
Executive Agency Maritime Administration
National Company Port Infrastructure
Maritime Cluster Bulgaria
Bulgarian Shipowners Association
Bulgarian Association of Shipbrokers and Agents
Bulgarian Shortsea & Inland Shipping Promotion Centre
Bulgarian Association for Freight Forwarding and Logistics

Directorate-General for Mobility and Transport

Stakeholders Dialogue
for eMaritime Organizations & eMaritime Applications

October 11-12th 2010

GOLDEN TULIP
Business Hotel Varna
Conference Center

Maritime Varna
Maritime Burgas
Maritime Bulgaria

EUROPEAN
COMMISSION

M S C

e Maritime

Conference concept, programme and organizing Shortsea Promotion Centre Bulgaria

Mr. S. Tzarnakliyski   **Mr. E. Moskov**

FOREWORD

Dear Colleagues, Dear Executives,
Esteemed Ladies and Gentlemen,

Effective maintenance, modernization and development of the transport infrastructure, including the infrastructure that ensures sea and land-sea transportation, integration of our national transportation system into the European one, including achievement of interoperability, improved business milieu for the providers of transport and related services, curtailment of the negative impacts of transportation on the environment and public health, and higher safety and security of the transportation services are among the priorities of the recently adopted Transport Strategy till 2020.

The 2010 High - Level Black Sea eShipping Summit focused on eMaritime provides an excellent opportunity for the major stakeholders in the maritime sector - the business and their associations, maritime and port administrations and the government, both central and local - to discuss and develop a vision and an action plan for the cross-fertilization of our common efforts to develop and improve the provision of shipping and related services both through the modernization of the transport and port infrastructure and improvements in the business environment and through the introduction of modern technologies.

The Summit takes place shortly after the public discussion of the eMaritime initiative of the European Commission and will surely help fine-tune Bulgarian policies and business undertaking in the area to achieve the aims of fostering the use of advanced information technologies in the maritime transport sector to improve the environment for both working and doing business there. The promotion of interoperability between all stakeholders in the use of standardized and simplified applications and procedures will provide a solid basis for coherent, transparent, and efficient interactions and solutions to the challenges in the maritime sector.

The Summit is the perfect forum to arrive at a consensus on the priorities and on the ways and means for the Bulgarian maritime community to go along and make best use of the initiative of the European Commission through the introduction of a National Single Window as well as through actions in the specific areas of eFreight and eCustoms, though the introduction of the long overdue Port Single Window and Port Community Systems, or, to make use of the same model of description, through actions in the area of ePort. This also fully applies to the IMO initiative of the development of a strategic vision or concept that will integrate existing and new navigational tools, and in particular electronic tools, so as to contribute to navigational safety while simultaneously reducing the burden on the navigators (eNavigation) and the other relevant eInitiatives of the European Commission.

Welcome in Varna at the e Maritime Summit…
Let,s make together the Black Sea region better for port and transport development!

Sergey Tzarnakliyski, Executive Director Maritime Administration
Evgeniy Moskov, General Director Port Infrastructure NC

for e Maritime Varna, e Maritime Burgas, e Maritime Bulgaria, e Maritime Black Sea

Mr. N. Hristov   **Mr. G. Petkov**

Dear fellows,
Dear Chairmen of professional maritime organization of Black Sea countries,
Colleagues and friends,

We have a pleasant obligation to inform and invite you for participation - personally you and your Board members - to participate actively in work of High Level Black Sea eMaritime Summit one day before FONASBA/ECASBA Annual Meeting 2010 in beautiful Bulgarian port-city Varna. Hosting organization of FONASBA and ECASBA 2010 Annual Meeting is Bulgarian Association of Shipbrokers and Agents.

For us, and I believe for your professional Maritime organization too, it is an honor and sign of notably attention Annual Meeting 2010 to be held in our Black Sea region - region of future sea trade growth - properly evaluated of International and European maritime community. This international recognition became our obligation to prove that we respond to the manifested trust and we are keen on fulfilling of European and IMO requirements of safe, security and efficient shipping as well as green shipping and green ports in Black Sea.

We have to harmonise and to improve our services in order to respond of present and future challenges in fast globalising shipping industry, to acquire IMO eNavigation and EU eMaritime initiative, as well as establishment of Port Community Systems and National Single Windows in our countries. Consolidation of our - the shipbrokers efforts - with efforts of other friendly participants - shippers, ship owners, port terminal operators and maritime administrations - is of high importance.

We need to enforce our cooperation and common working activities with European and International - Black Sea professional bodies - organizations as ECASBA, ECSA, ESPO, ESN, BASPA, BINSA, IMO, IAPH as well as EC Directorate-General for Mobility and Transport. During the High Level Black Sea eMaritime Summit of Maritime Organizations and Maritime Administrations we suggest to discus implementation of EU eMaritime initiative - eFreight, eCustoms, ePort and IMO eNavigation too, establishment of Port Community Systems and National Single Windows in the Black Sea countries.

Please pay attention to the enclosed program of the Black Sea eMaritime Summit.
Your speaker contribution and participation of your Board members will be very much appreciated…
See you in Varna at Black Sea eMaritime Summit..

Nikola Hristov, Chairman of Bulgarian Association of Shipbrokers and Agents
George Petkov, Director Shortsea & Inland Shipping Promotion Centre Bulgaria

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Short Sea Shipping

European trends: The growth of short sea shipping is a result of increasing intra-European trade, the deep sea hub and feeder concept. The increase in containerisation has also had an impact on the short sea fleet.Shipping carries nearly 90% of European external trade; European companies and residents today own about 40% of the world's shipping fleet; About 25% of the world fleet flies a European flag.

Bulgarian measures & actions: Main - Strategy for Development of Bulgarian Transport System to 2020: European standards and National interests. Changes in Merchant Shipping Code: The changes are in compliance with modern decisions in legislation of well developed maritime countries.
Main is: making Bulgarian flag more attractive, simplifying of the process of ship registration, better regulation for some shipping services. Modernization of info systems supporting short sea shipping: Implementation of 3 faze of Maritime Information System/VTMIS and starting of 1 faze of River Information System /RIS. Bulgaria build successfully EMSA Info Systems: Safe Sea Net and Clean Sea Net.

Ferryboat Shipping

European trends: The Freight Ferry Ro Ro transport has a high growth rate, especially in the Mediterranean. This has resulted in the replacement of passenger space with freight space and the deployment of faster, modern vessels.The market for unaccompanied freight transport is growing strongly in many geographical regions, and is characterised by the use of larger modern and multifunctional vessels.

Bulgarian measures & actions: In the Black Sea region rail sector constitute together with the ports a key modal interchange in the regional transport network. A new ferryboat network is established in Black Sea dominated of rail freight ferryboats. Bulgaria has signed a new agreements/memorandums for ferryboat services with Russia, Georgia and Turkey. A ferryboat alliances/pools are forming between Bulgarian and Romanian companies and between Bulgarian and Russian companies for a new Euro - Asia ferryboat bridge via port Kavkaz. Rail Ferry Varna Terminal make links to ports Constantza, Odessa, Kavkaz, Poti, Batumi, Samsun.RoCon ferry line Burgas-Poti-Novorosiysk is making Danube-Black Sea intermodal link. Russian Rail Freight Ferry Concept is dominating: in 2010 four ferryboats are operating with capacity of 200 wagons and till the end of 2012 four more ferryboats with capacity of 320 wagons/containers/trucks will operate. The new ferryboats of Black Sea Ferry Ltd. a RZD company are with European and Russian railing dimensions. Organization of RoPax Ferry link is under discussion between Bulgaria and Russia.

Container Shipping

European trends: Container transport has expanded enormously over the last 20 years. Containerised trade will continue to grow over the next decade. In particular, container trades have seen strong growth, with average annual growth rates of 10%. Volume growth is expected to resume only from 2012/2013.
East Mediterranean & Black Sea Scenarios 2020: low/bad-15.8 mio TEUs; and high/ good-25.9 mio TEUs
Capacity 2005/13,37 % - 2015/29,21% - 05/15 +118,5% Demand 2005/12,30 % - 2015/32,83 % - 05/15 +166.9%

Bulgarian measures & actions: Feeder operating container concept is dominating in Black Sea . Feeders are serving all Black Sea container terminals. The main container operators of 25 top world container lines are presented. Container lines are giving good transit time, prices and info systems. Improvement on feeder management: transit time and services is needed. Measures for simplifying of administrative procedures are required: i.e. implementation of European e Maritime initiative. Establishment in Bulgaria and Black Sea countries Port Community Windows is also needed. Black Sea Ports Network should be better..

Port Terminals

European trends: The evolution of European seaports has been driven by growing containerisation. Evolutions trends:from port communities to port regionalisation.Current situation: to port terminalisation, Future trends and developments: to port networks. West Black Sea Multi ports gateway is going to be formed European port impacts trends: the emergence of short sea shipping as a result of containerisation and intra-trades;the increase in average vessel sizes; the increase in volumes and the resulting increase in pressure on port capacity. Capacity shortages were also forecast for the Black Sea ports. On the one hand, capacity demand has slowed down, while, on the other, port extension projects have been initiated.

Bulgarian measures & actions: Main - Strategy for development of transport infrastructure trough concession procedures. In near 2 years is planed 24 terminals (containers, ferry, chemicals, bulk, etc.) in Bulgarian river and sea ports to be concessed with different PPP schemes. The projects for new container terminals in Varna and Burgas Ports are started. Container terminal in Burgas is with Deep Sea/Hub Port functional concept and in Varna with Feeder Port functional concept. After finishing the projects these two new terminals could operate more than 900 000 TEUs with possible development. Industrial groups are interested in construction of port terminals for grain, liquefied gas, etc.

Intermodal terminals & Freight villages

European trends: EU enlargement further promoted   intermodal terminal structure/network. Intra-regional volumes remain significant, especially in the EU, but the evolving economic and political environments have increased the proportion of inter-continental flows, leading to considerable changes in transport, logistics and supply chain. Supply-chain structures have become more and more complex. Logistics groups and mega-carriers are increasingly organising their operations around a network of terminals. Terminals have become the driving force in cooperation between port stakeholders with a view to optimising logistics processes.

Bulgarian measures & actions: Main - NRIC Strategy for Construction and Development of Intermodal Terminals and Freight Villages in Bulgaria. Action Plan for intermodal strategy implementation is ready and in process of implementation. NRIC created a network of six rail intermodal terminals. NRIC Sofia Poduene Stantion Intermodal terminal will be open in the near future. The other state company NC "Industrial zones" is planning establishment of new big industrial zone with logistics functions and intermodal terminal facilities near Sofia. The industrial zone Varna-West is giving priority as a Freight village to Varna Ferry & Container Terminal. Intermodal company EcoLogistics Ltd. established specialized intermodal terminal at 60 dka in Sofia - Yanna Rail Station. The intermodal terminal is operating for containers 20' 40' 45', tank containers, flat rack, swob-body, etc.. A next step is establishment of Freight village. The Sofia Intermodal Terminals are plain role as a Balkan Intermodal Traffic Platforms for Balkan - Black Sea intercontinental links.

Motorways of the Sea: Short Sea Shippnig of 21th century

"The EU "Motorways of the sea" concept aims at introducing new intermodal maritime-based logistics chains in Europe, which should bring about a structural change in our transport organisation within the next years to come. Motorways of the sea will thus improve access to markets throughout Europe, and bring relief to our over-stretched European road system. For this purpose, fuller use will have to be made not only of our maritime transport resources, but also of our potential in rail and inland waterway, as part of an integrated transport chain."
EU Maritime Policy

Black Sea Motorways of the Sea

"In particular the Black sea area could constitute a priority area for the development of Motorways of the Sea and for the enhancement of maritime trade. This includes both the improvement of existing maritime links and creation of new links, whether between the Eu and the TRACECA countries.
The extension of the Motorways of the Sea to connect EU with neighbouring regions /incl. Black sea region/ has been identified by the High Level Group as an issue of priority. The implement of Motorways of the Sea concept in TRACECA region it is essential to undertake a multitude of measures such as improving the quality of infrastructure and service in ports."
IGC TRACECA Strategy

Motorways of the Sea TRACECA 2010 Pilot Project

"Acknowledges that this first phase was important to share a common understanding of Motorways of the Sea and their potential contributions to the development of efficient intermodal maritime based freight transport links. This connections should be integrated for national, regional and transit trades of TRACECA Countries in door to door logistics transport chains.
Recognizes and stresses the importance of fostering cooperation between Ministries, Port Authorities, Customs, maritime and land transport operators across the entire intermodal chains in the elaboration of concrete and attractive integrated MoS transport solutions."
"Motorways of the Sea for the Black Sea & the Caspian Sea" TRACECA Project
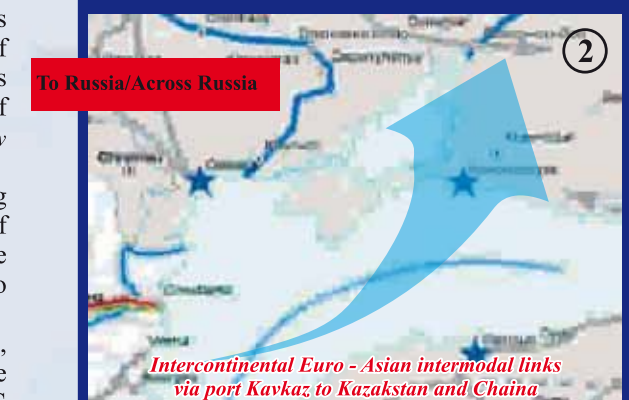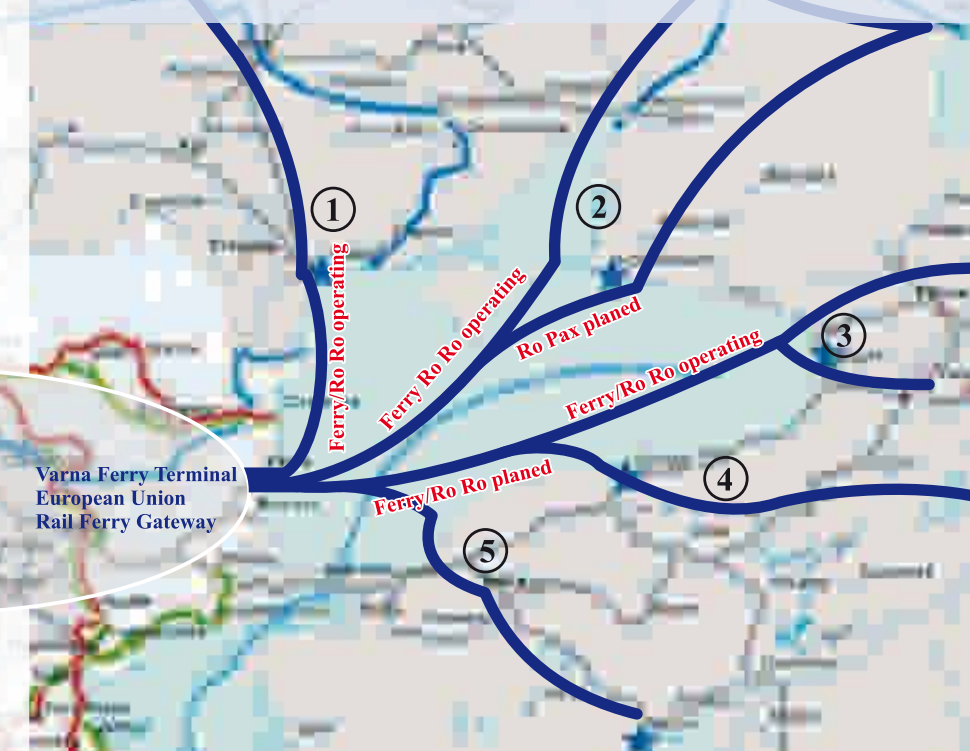
The EC provides financial support for Motorways of the Sea implementation through a variety of financial instruments, including:
Trans-European Transport Networks funding;
Marco Polo Programme; Regional and Cohesion Funds;
European Investment Bank loans;
Loan Guarantee Instrument MoS & EU neighbours

To Ukraine/Across Ukraine ①

Interregional intermodal links Black-Baltic Sea block trains "Viking" and "Zubr"

To Russia/Across Russia ②

Intercontinental Euro - Asian intermodal links via port Kavkaz to Kazakstan and Chaina

To Georgia/Across Georgia ③

Intercontinental Euro - Asian intermodal links TRACECA Corridor - Silk link to Central Asia

To Turkey/Across Turkey ④

Intercontinental Euro - Asian intermodal links via port Samsun to Near East - Irak & Iran

To Turkey/Across Turkey ⑤

Intercontinental Euro - Asian intermodal links via port Zonguldak to East Mediterrane & Near East

Varna Ferry Terminal
European Union
Rail Ferry Gateway

Ferry/Ro Ro operating
Ferry/Ro Ro operating
Ro Pax planed
Ferry/Ro Ro operating
Ferry/Ro Ro planed