

Annual Report 2021 – 2022

*European Sea Ports
Organisation*



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About ESPO

THE FIRST PORT OF CALL FOR EUROPEAN TRANSPORT POLICY MAKERS IN BRUSSELS

ESPO ensures that seaports have a clear voice in the European Union: it represents the common interests and promotes the common views and values of its members to the European institutions and its policy makers.

ESPO represents the port authorities, port associations and port administrations of the seaports of 22 Member States of the European Union and Norway at EU political level. ESPO also has observer members in Albania, Iceland, Israel, Montenegro, Ukraine and the United Kingdom.

ESPO's mission is to influence public policy in the European Union in order to achieve a safe, efficient and environmentally sustainable European port sector, operating as a key element of a transport industry where free and undistorted market conditions prevail, as far as practicable.

Foreword

*By ESPO Chair,
Annaleena Mäkilä*

Since the beginning of 2020, we are experiencing several successive world crises, with each new crisis more unexpected and unpredictable than the last. The continued fallout from the pandemic and the Russian invasion of Ukraine have turned Europe's economy and society upside down in an unprecedented way. At the same time, these crises have also uncovered some truths that have previously been overlooked or ignored. The perfect storm we are in the middle of has highlighted the essential and critical role seaports are playing in mitigating the effects of these crises, and ports are likely to play an even greater role in the future. These crises do not alter the fact that Europe's, and hence the ports' main challenge, is to stop or at least limit climate change. Unfortunately, the efforts deployed by ports to respond to these crises, and the agility ports have shown during this period, are not always contributing to reaching the Green Deal ambitions.

It is our belief and our wish that these crises, and in particular the ongoing energy supply crisis, will not stop the green transition in Europe – on the contrary. However, to make this green transition a reality, ports must be able to count on an adequate legislative framework legislation that sets clear goals and supports ports in their role, their efforts, and their investments to enable the green transition.

During the past year, ESPO has been very active in assisting its members in following the legislative process on the relevant Fit-For-55 proposals and the more recently published REPowerEU measures. At the same time, we have been working very constructively with both the Commission, the Parliament and the Council to develop a legislative framework that allows ports to pursue their strategies and make the investments that make the most sense, in order to reduce emission effectively and enable ports to act as partners in the green transition. Finally, with a view on the review of the TEN-T guidelines and policy, we believe it is time to consider the importance of ports not only in terms of tonnes but also the role of ports in ensuring the supply of energy, as well as their strategic role in the new geopolitical reality we are living in.

The ESPO Conference in June of this year in Valencia was a real success. It was an absolute joy to see each other again after more than two years to discuss and exchange. Being part of a network like ESPO is more important than ever in periods like this. Brainstorming about possible new world developments, new solutions and approaches to tackle new problems is key to making ports fit for the future. This year we have also been able to enlarge our ESPO network with the ports of Montenegro. I am also very grateful for the efforts our members have deployed in the ESPO fundraising for the Ukrainian port community and their families to help

them in getting through this extremely difficult period. I would like to thank all ESPO members who engage actively in the work of our organisation, and give the secretariat the knowledge and information to develop well-founded positions. I would of course also like to express my gratitude to Zeno and Daan, the two vice Chairs, with who it has been a pleasure cooperating during the last two years. Last but not least, many thanks to the ESPO secretariat for the good work, ensuring continuity, and being our real first port of call in Brussels.

ESPO Committees and Networks



ESPO Committees and Networks

Technical expertise and advisor input come from the Technical Committees and Networks on the following topics.

These specialised Committees and Networks are made up of experts from the member ports and are coordinated by the ESPO secretariat. The recommendations of the Technical Committees are submitted to ESPO's Executive Committee who then takes the final decision.

The following section gives an overview of the work of all ESPO Committees and Networks, with in the 'Spotlight' the most important files. This report presents ESPO's work for the period mid-October 2021 until end-October 2022.

Port Governance and Management

Chaired by Bernhard Zampolin (DE)

Intermodal, Logistics and Industry

Chaired by Cédric Virciglio (FR)

Sustainable Development

Chaired by Heidi Neilson (NO)

Vice-Chair EcoPorts in Sustainable Development Committee Chryssanthi Kontogiorgi (GR)

Trade Facilitation, Customs and Security, and Marine Affairs

Chaired by Kristin van Kesteren-Stefan (B)

Economic Analysis and Statistics

Chaired by María Dolores Lloveras (ES)

Cruise and Ferry

Chaired by Antonio Revedin (IT)

Labour and Operations

Chaired by Panagiotis Fevgas (GR)

Blue Growth

Chaired by Carlos Botana (ES)

Energy

Chaired by Huibert van Rossum (NL)

Legal Advisory

Chaired by Mārtiņš Ziemānis (LV)

Port Governance and Management

Trends in European Ports' Governance 2022

Every five years, ESPO is conducting a fact-finding survey to assess if and how port governance models have been changing in European ports. ESPO had launched the survey end of 2021, which was for the first time conducted through ESPO's data platform PortinSights. Compared to the last edition in 2016, the survey included additional questions in the fields of circular economy and the strategic role of ports. The Committee was instrumental in evaluating the received data, in deciding the focus of the report, as well as in discussing evolving topics to be included in a future edition.

The report "Trends in European Ports' Governance 2022" was presented at the ESPO Conference 2022 in Valencia and is available both hard copy and on the ESPO website.

Consortia Block Exemption Regulation

In preparation of its decision on the continuation of the Consortia Block Exemption Regulation, which expires in April 2024, the European Commission launched a call for evidence. ESPO submitted a common position to the consultation, stressing the need for more transparency and monitoring, as well as clear rules for consortia in the shipping sector. The Committee on Port Governance and Management monitored throughout the year the developments on both EU and international level with regards to the disturbances of the maritime logistics chain, as well as initiatives and political actions linked to shipping consortia.

Foreign distortive subsidies

In May 2021, the European Commission published a proposal for a regulation on foreign subsidies distorting the internal market to close the current legal gap and to ensure a level playing field for all undertakings operating in the single market which receive support from an EU member state or from a non-EU country. End of June 2022, the European Parliament and the Council reached an agreement on the text. ESPO welcomed the agreement as an important tool to reach a level playing field, while also stressing the importance of an open investment environment.

Other topics

The Committee also held exchanges about the implementation of the Port Services Regulation in preparation of the upcoming implementation report, which is due in March 2023. In addition, members of the Committee, together with the ESPO secretariat, actively followed the relevant aspects of the Commission's REPowerEU initiative, such as permitting procedures and "go-to areas". Furthermore, the Committee on Port Governance and Management followed up on the establishment of freeports in the UK and discussed the possible implications for EU ports.



POSITION PAPERS

- **3 OCTOBER 2022**
[Contribution Of The European Sea Ports Organisation \(Espo\) To The Call For Evidence For The Evaluation Of The Consortia Block Exemption Regulation](#)
- **3 OCTOBER 2022**
[Review Of The EU Consortia Block Exemption Regulation](#)
- **2 NOVEMBER 2022**
[Commission proposal for a Directive amending the Renewable Energy Directive, the Energy Performance of Buildings Directive and the Energy Efficiency Directive](#)

Intermodal, Logistics and Industry

Revision of the TEN-T network

The European Commission published the proposal for the revision of the TEN-T network in December 2021 and, in July 2022, proposed an amendment to its initial proposal in order to account for the changed geopolitical situation following the Russian war against Ukraine.

ESPO invited DG MOVE to the Committee meeting early on in the year to present and discuss the proposal. Following the exchange in the Committee, ESPO published its position on the Commission's proposal on 4 April 2022 and organised several meetings with the European Parliament's co-rapporteurs and other involved Members of the Parliament. Europe's ports support in particular that the Commission's proposal strengthens the importance of the maritime dimension through the concept of the 'European Maritime Space' and by facilitating short-sea shipping connections.

In addition, ESPO welcomes that the proposal recognises the multi-dimensional role of ports within the framework of Europe's TEN-T policy and, for the first time, explicitly recognises their role as cross-border multimodal nodes which serve not only as transport hubs, but also as gateways for trade, industrial clusters and energy hubs.

On 10 October, the co-rapporteurs Dominique Riquet (Renew, FR) and Barbara Thaler (EPP, AU) presented their draft report in the European Parliament's TRAN Committee. ESPO actively engaged with members of the TRAN Committee to further improve the port-related aspects of the draft report.

Connecting Europe Facility 2021-2027 (CEF II)

The Connecting Europe Facility II Regulation has been in place since July 2021. Since then, ESPO has been actively monitoring the different Transport Calls

and the ports' performance in these Calls. The 2021 CEF Transport Call was open until 19 January 2022 and was heavily oversubscribed. A total of 135 projects have been selected for co-funding by the Commission. Out of the total number of accepted projects, 25 are port projects amounting to 18.5%. In terms of funding, the Commission has allocated EUR 5.4 billion, out of which EUR 202 million are set to go to port projects, amounting to 3.7% of the total funding.

ESPO organised a follow-up meeting with the European Climate Infrastructure and Environment Executive Agency (CINEA) to evaluate the performance of port projects in the application process and to present the CEF 2022 Transport Call, which opened in September 2022.

ESPO also communicated other funding opportunities to members, such as the CEF military mobility call, the Innovation Fund call, as well as calls under Horizon Europe.

Combined transport

The Intermodal, Logistics and Industry Committee agreed in 2021 that ESPO and EFIP should prepare a joint position on the revision of the Combined Transport Directive, to be submitted to the Commission's public consultation, which was opened in May 2022. European sea and inland ports consider the revision of the Combined Transport Directive as an important tool to incentivise and promote the use of multimodal transport. The revision should aim to strengthen infrastructure connections, interoperability and complementarity between the transport modes. The final position was jointly submitted to the public consultation and published on the ESPO website.

European Railway agency report on rail-port synergies

Following the European Year of Rail in 2021, ESPO remained closely involved in the European Railway Agency's (ERA) work on rail-port synergies necessary to promote and improve European rail freight. ESPO members were involved in the preparation of the report through structured surveys and interviews. The report was published in July 2022 and addresses both infrastructural as well as operational challenges. ERA also identifies the difference of governance models across Europe with regards to the rail management in maritime ports.

Other topics

A horizontal topic of 2022 was the Russian aggression against Ukraine. Jointly with the European Commission and other stakeholders, ESPO was closely involved in the establishment of the "Solidarity Lanes" in order to enable essential Ukrainian exports to leave the country. Projects enhancing the solidarity lanes have been included within the priorities of the 2022 CEF Transport Call. ESPO informed members about the changes to the Commission's TEN-T proposal, which have been introduced to increase the

connectivity with Ukraine and Moldova and to downgrade connections to Russia and Belarus. In addition, ESPO published a joint statement with the European Federation of Inland Ports (EFIP) calling for a concerted answer to respond to low water levels in inland shipping.



POSITION PAPERS

• 4 APRIL 2022

[Position of the European Sea Ports Organisation on the Commission proposal for the revision of the Union guidelines for the development of the Trans-European Transport Network \(TEN-T\)](#)

• 26 APRIL 2022

[Joint Position on the Revision of the Combined Transport Directive](#)

• 20 SEPTEMBER 2022

[ESPO – EFIP Joint statement on low water levels](#)

Trade Facilitation, Customs and Security, and Marine Affairs

Russian invasion in Ukraine

The Russian invasion of Ukraine which started on 24 February has been high on ESPO's agenda. The European port community condemns the Russian invasion of Ukraine and continues to express its solidarity with the Ukrainian port community.

Following the Russian invasion of Ukraine, the EU has imposed a number of sanctions packages – eight in total – against Russia, including targeted restrictive measures (individual sanctions), economic sanctions and diplomatic measures. The EU has also adopted sanctions against Belarus in response to its involvement in the invasion of Ukraine. The sanctions aim at banning a series of Russian products to be imported into the EU and at banning the export of certain EU goods to Russia. As part of the fifth sanction package, the EU decided to close its ports – later on also the access to locks -

to Russia's entire merchant fleet of over 2 800 vessels, with some exceptions. On 12 April 2022, ESPO has been expressing its support for these sanctions packages, but Europe's ports have stressed the importance of clarity and uniformity in the application of the sanctions in the different EU Member States. Moreover, ports have asked governments to put everything in place to guarantee a smooth implementation of this decision and limit further disruption of the EU supply chain.

Ukraine solidarity lanes

On 12 May 2022, the Commission announced an Action plan for EU-Ukraine Solidarity Lanes to facilitate Ukraine's agricultural export and bilateral trade with the EU. The plan aims at enabling Ukraine to effectively import and export goods, by establishing alternative logistics routes using all transport modes linking the EU to Ukraine. An important role is in this context also foreseen for several

relevant European ports. ESPO informed members about this initiative and brought interested ports in contact with the Commission in view of facilitating the matchmaking.

Ports as critical infrastructure: Cybersecurity and Resilience

During last summer, the European Parliament and Council came to an agreement on the directive on the resilience of critical infrastructure (CER Directive) and on the revised directive on the security of network and information systems (NIS2 Directive). The CER Directive puts forward a new framework for cooperation, as well as obligations for Member States and critical entities aimed at strengthening the physical non-cyber resilience. Eleven sectors are now covered: energy, transport, digital infrastructure, banking, financial market

infrastructure, health, drinking water, wastewater, public administration, space, and food. The NIS2 Directive will put in place a broad sectoral coverage of cybersecurity obligations. This will encompass a new requirement for Member States, to include, where relevant, undersea cables in their cybersecurity strategies. Following the acts of sabotage against the Nord Stream pipelines, the European Commission published a draft Council Recommendation to strengthen the resilience of EU critical infrastructure. The draft Recommendation aims in essence at, where possible and appropriate, anticipate the implementation of the above-mentioned Directives. ESPO will now assess in further detail the impact of the final texts of these directives on the ports in view of assisting ESPO members with the implementation process in their Member State.

Trade Facilitation, Customs and Security, and Marine Affairs

POSITION PAPERS

• 12 APRIL 2022

[ESPO supports the EU's 5th sanction package against Russia and insists on a clear, uniform and smooth application in the different Member States](#)

European Maritime Single Window Environments

Over the last year, ESPO continued to participate in the work of the European Maritime Single Window Expert Group. ESPO was represented in this group by Raymond Seignette (Port of Rotterdam) until summer and is now represented by Miguel Llop Cabrera (Port of Valencia), who reports regularly to the ESPO Committee.

In May 2022, Parliament and Council reached a final agreement on the Regulation establishing the EU Single Window Environment for Customs. ESPO's main request in this context was to ask for more clarity on the relationship between the Maritime and Customs Single Window environments. This point was taken up in the Parliament position.

Brexit: ESPO member of the EU advisory Group on the EU-UK Trade and Cooperation Agreement

As from 1 January 2021, ESPO has focused on the implementation of the EU-UK Trade and Cooperation Agreement, more specifically focusing on the impact on EU ports. ESPO is a member of the transport subgroup of the EU Domestic Advisory Group on the EU-UK Trade and Cooperation Agreement (the so called "EU DAG"), which is charged with monitoring and providing advice on the implementation of the Agreement. The members of the transport subgroup of the EU DAG decided to make a paper outlining the main concerns and potential future issues that the transport sector faces due to the UK's withdrawal from the EU and issues linked to the EU-UK Trade and Cooperation Agreement. This paper was shared with the EU-UK DAG and the different relevant DGs of the European

Commission. The topic of relevance identified in the paper relate to competitiveness and reciprocal market access, the issue of freeports and the level playing field, the EU-UK maritime passengers' transport, ensuring a level playing field for ports in between the EU and UK when it comes to decarbonisation policies, and reinforcement of customs cooperation and trade facilitation between the Parties.

ESPO will continue to monitor the work of the transport subgroup of EU DAG.

Other topics

The Chair of the Trade Facilitation Committee, Kristin Van Kesteren-Stefan continues to follow up the work of the Trade Contact Group, a Commission platform for regular consultations at EU level on the development and implementation of customs related issues and developments of customs policy.

ESPO has also been following the further legislative process on the proposal for a regulation establishing a Carbon Border Adjustment Mechanism which aims to raise the global climate ambitions of countries, to preserve global competitiveness of EU companies, and to prevent 'carbon leakage' by putting a carbon price on imports from less climate-ambitious countries.

Sustainable Development

Making the Fit for 55-package fit for ports

During the past working year, the Fit for 55-package, including four important files for ports (Alternative Fuels Infrastructure Regulation (AFIR), FuelEU Maritime, EU Emission Trading System (ETS) and the Energy Taxation Directive (ETD)), has been high on ESPO's agenda. While ESPO has been fully supportive of the ambition to make the EU fit for 55% greenhouse gas reductions by 2030, it has put a lot of effort in working both with the Commission, Parliament and Council to make the package fit for purpose.

For Europe's ports it is essential to ensure ambitious and workable policies that will deliver effective emissions reduction without creating stranded assets or a competitive disadvantage for European ports. Prioritising investments in onshore power supply (OPS) where it makes sense, avoiding carbon and business leakage in the development of

an emission trading system for shipping and calling for aligning the requirements for demand and supply of alternative fuels, through a full coherence between AFIR and FuelEU Maritime, have been the main messages passed by ESPO in that respect. Legislative developments have required several Committee meetings to refine existing positions on the various legislative proposals put forward by the European Commission, as well as exchanges of views with EU policymakers and other stakeholders to come to a good compromise. ESPO has also participated in numerous workshops and conferences to explain the proposals and to share its concerns and proposals to improve the proposals. At the time of writing, the European Parliament and Council have developed their positions on most of the key files relevant to ports. These positions must be agreed before negotiations between the two institutions can start (referred to as 'trilogues'). There is significant pressure to agree the main elements of

the Fit for 55-package by the end of this year, or in 2023 at the latest.

In 2022, EU Member States agreed general approaches on emission trading and the promotion of alternative fuels in the maritime sector. A Council position on energy taxation has not been agreed yet, and has stalled due to the ongoing energy crisis. European Parliament has adopted its position on emission trading, whilst the EP TRAN Committee has agreed its stance on AFIR and FuelEU Maritime with plenary endorsement foreseen in the second half of October. Discussions on energy taxation are still ongoing in Parliament.

With negotiations between EU institutions about to move into a new phase, ESPO remains well-positioned to promote the interests of European ports on key issues relating to Fit for 55.

Onshore Power Supply (OPS)

ESPO has contributed to guidance for ports considering onshore power supply by the European Maritime Safety Agency (EMSA) published in July 2022. The guidance is intended to increase the robustness of the existing regulatory framework and provide ports with clear and uniform good guidance to aid in the deployment and usage of OPS.

Sustainable Development

25 years of EcoPorts and ESPO Environmental Reports

2022 marks 25 years since the creation of the EcoPorts Network, which is the main environmental initiative of the European port sector. It was initiated by a number of proactive ports in 1997 and has been fully integrated into the European Sea Ports Organisation (ESPO) since 2011. Since its foundation, the Network has continued to grow with many members and a growing share of ports using the tools offered as part of EcoPorts.

With over 105 members from 25 countries, and 31 PERS-certified ports, the Network is going strong. The growing interest in the EcoPorts Network was highlighted during the 25-year anniversary celebrations held at the 2022 GreenPort Congress.

ESPO has been working together with members and academics to update the questions in the Self-Diagnosis Method

(SDM) checklist. This includes both changes to existing questions as well as inclusion of new questions that cover key environmental aspects of relevance to ports.

Alongside the updated 2021 Green Guide, ESPO also developed a Good Green Practices database, where the various environmental projects and initiatives taking place in European ports are made available to policymakers and the general public. There are currently over 150 good practices in five different categories available on the online database. In October 2022, the ESPO Environmental Report 2022 was presented at the GreenPort Congress hosted by Port of Antwerp-Bruges. The report saw changing environmental priorities amongst surveyed ports, with climate change being the top environmental priority for the first time. The ESPO Environmental Report 2022 contains several positive developments in terms of improved monitoring and environmental management, continuing trends of the past few years.

Implementation of the Port Reception Facilities Directive

ESPO has been involved in the implementation of the Port Reception Facilities Directive (PRF Directive) by the European Commission. The Directive aims to ensure the delivery of waste onboard ships to ports through EU rules that control and incentivise this. The most relevant aspect of the implementation of the PRF Directive concerns the green reduction on waste fees in ports. In January 2022, the Commission published the final criteria for sustainable waste management onboard ships, where ships that live up to certain mandatory criteria shall receive a discount on the port waste fee. This requires ports to reward ships that reduce onboard waste, or manage it sustainably, by reducing the waste fee they have to pay at EU ports. Importantly, ports can decide how much the waste fee shall be reduced.

Top 10 environmental priorities of the port sector in 2022

1. Climate change
2. Air quality
3. Energy efficiency
4. Noise
5. Water quality
6. Relationship with the local community
7. Ship waste
8. Garbage/port waste
9. Port development (land related)
10. Dredging operations

POSITION PAPERS

- **18 JANUARY 2022**
[ESPO position on the proposal for a maritime EU ETS](#)
- **18 JANUARY 2022**
[ESPO position on the proposal for a Council Directive restructuring the Union framework for the taxation of energy products and electricity](#)
- **29 NOVEMBER 2021**
[ESPO position on the Alternative Fuels Infrastructure Regulation \(AFIR\) and on the proposal for a FuelEU Maritime Regulation](#)

Cruise and Ferry

POSITION PAPER

• 24 MAY 2022

[European ports and Interferry agree priorities for sustainable future](#)

The cruise and ferry sectors are slowly nearing the end of the COVID crisis, which has left a mark on passenger traffic in Europe. The Russian invasion of Ukraine has created a new crisis, in particular in the Black and Baltic Sea, leading ports to expect significant changes to the circumstances that the sector is operating in, including potentially the willingness to travel. However, these challenges have not changed the political support for the European Green Deal and the Fit for 55-package. The Cruise and Ferry Port Network has been closely involved in the development of ESPO positions on key files in this package, especially on the particularities of the requirements on onshore power supply for the ferry and cruise vessels and ports.

In 2022 ESPO agreed on a joint statement with Interferry on the need to prioritise onshore power supply (OPS) where it makes sense as well as developing joint priorities for sustainable passenger transport. Since 2020, ESPO has been closely involved in the implementation of EU

legislation for checks of third-country nationals entering the EU Schengen area as part of the ongoing implementation of the Entry-Exit System Regulation (EES). The EES is a large-scale IT system for the automatic monitoring of the border-crossing of third-country nationals, which aims to speed up and reinforce border check procedures for non-EU nationals travelling to the EU.

Member States must carry out registrations and checks of third-country nationals close to the national borders, which in practice entails checks of passengers in ports. This raises a number of practical concerns, especially for passengers travelling in vehicles, and when it comes to new infrastructures in crowded port areas. In May, ESPO raised these concerns in a joint industry letter with Airports Council International (ACI) that was sent to the EU Commissioner for Home Affairs.

The European Commission (DG MARE) has been working on a report on sustainable cruise tourism, which also

includes a list of good practices to be shared. ESPO is a member of the Peer Review Group (PRG) which assists the Commission in drafting the report to be published by the end of 2022.

Labour and Operations

Meetings of the Sectoral Social Dialogue Committee (SSDC) for ports put on hold

After having paused the Social Dialogue in 2021 over frustration about the functioning of the Social Dialogue and the lack of support from the European Commission, the four Social Partners (ESPO, FEPORT, ETF, IDC) agreed to take up the official meetings again in 2022 following a constructive meeting with the Commission. One SSDC meeting took place in January 2022, before an internal conflict of IDC caused the Social Dialogue to be put on hold again. The secretariats of the Social Partner organisations, including the new configuration of formerly IDC into IDC and EDC (European Dockers Council), met on 6 October 2022 supported by the Commission to discuss the future of the SSDC. Whereas the majority of Social Partners was in favour of continuing the

SSDC on the basis of mutual recognition of all organisations, IDC insisted on a formal representativeness study by the European Commission to define the legitimate Social Partners. If IDC does not agree to recognise the other organisations, the official SSDC will be dormant until the result of such study (in about two years). The engaged Social Partners are committed to continue their work informally, if a continuation of the SSDC will not be possible.

Working group safety on board of ships

In the beginning of 2022, the experts of the Working Group on safety of work on board of ships presented the common vessel inspection checklist developed by the expert group, which was created in 2021, when Social Partners decided not to resume the Social Dialogue but successfully continued working on safety of work on board of ships outside the framework of the SSDC. The social partners called on the Commission to take over the checklist and incorporate it into the current revision of maritime safety legislation.

Economic Analysis and Statistics

ESPO continued to develop its data platform [PortinSights](#). About 100 European ports are regularly contributing their quarterly throughput data, together accounting for more than 70% of European maritime throughput. The Committee has been instrumental in gathering and analysing the ports' throughput data. Following the impacts of COVID-19 and the ongoing recovery, the focus has shifted towards the energy transition and the impacts of the Russian invasion of Ukraine. The analysis of the first half of 2022 shows a continuous upward trend regarding the total throughput of European ports. ESPO is in the final steps of setting up the digital quarterly report, which will feature the main developments and trends of different commodities, aggregated by port ranges. The report will be publicly available each quarter as from Q1 2023 on the ESPO website.

Development of performance indicators

In 2022, the Economic Analysis and Statistics Committee continued to explore areas to expand port performance measurement beyond port throughput. The Committee looked specifically into collecting data on the value of goods, but encountered problems as no harmonised classification system is currently in use. ESPO continues its efforts to collect port modal split data, however difficulties remain as European ports often rely on external parties for data on modal share, meaning that port managing bodies cannot always provide exact data. In view of the European Green Deal and the EU's climate ambitions, ESPO will continue its efforts to establish a representative modal split data collection.

ESPO – Eurostat cooperation

The Economic Analysis and Statistics Committee also continued its exchange and cooperation with Eurostat. Eurostat's maritime statistics unit participated in a meeting of the Economic Analysis and Statistics Committee to present trade flows by major regions and by commodities. The presentation included trade flows to and from Russia explicitly.

Blue Growth

The Blue Growth network, together with the Energy network, followed up closely all relevant EU policy developments regarding offshore renewable energy. In this context, ESPO followed up all relevant legislative developments regarding the European Parliament's work on an own-initiative report on a European Strategy for Offshore Renewable Energy. ESPO's plea to recognise the role of seaports in the development of Offshore Renewable Energy (ORE) and its impacts on the port sector has been well integrated in the final Parliament report.

ESPO is part of the working group on ORE created by the Commission, composed of 20 representatives from the whole supply chain. The objective of this working group is to identify the challenges which the ORE sector faces and potential implementation bottlenecks for reaching the 2030 and 2050 ORE goals, as well as develop recommendations to the Commission and Member States to overcome these barriers.

The Blue Growth network also monitored all relevant policy developments leading up to the adoption on 3 May 2022 of the European Parliament resolution Toward a sustainable blue economy in the EU: the role of the fisheries and aquaculture sectors. It is a response to last year's Commission communication on a new approach for a sustainable blue economy in the EU: Transforming the EU's Blue Economy for a Sustainable Future. ESPO had contributed to the development of the EU's new sustainable blue economy strategy by publishing a position outlining the policy priorities for European ports. On 21 June 2022, the second meeting of the European Ports Forum's sub-group on Ports as Hubs for a Sustainable Blue Economy, of which ESPO is a member, took place. This sub-group of the European Ports Forum was established to discuss issues surrounding the evolving role of ports in a changing industrial landscape and to see how ports can become dynamic nodes for

blue economy clusters and blue innovation ecosystems. Commission DG MARE also intends to create a Blue Forum by autumn this year in order to have a pan-European platform to define common goals.

Overall, ESPO's Blue Growth network has worked closely together with ESPO's Energy network over the last two years. It is therefore being proposed to merge these two networks into one ESPO committee.

Energy

POSITION PAPERS

• 1 JUNE 2022

[ESPO Study – The New Energy Landscape](#)

• 2 NOVEMBER 2022

[Commission proposal for a Directive amending the Renewable Energy Directive, the Energy Performance of Buildings Directive and the Energy Efficiency Directive](#)

REPowerEU

The impact of the Russian invasion in Ukraine and the sanctions (see Trade Facilitation) that has been agreed on against Russia as well as their ever impact on the provision of energy have been one of the main topics discussed in the Energy network since 2022. In March of this year, the Commission launched the REPowerEU communication aiming at phasing out Europe's dependency on Russian energy imports by 2030. Pushed by the European Council, the Commission presented two months later, on 18 May, a more detailed REPowerEU plan to reform the EU's energy system and ramp up the production of renewable energies.

This plan was accompanied by a proposal for a directive amending the Renewable Energy Directive (RED), the Energy Performance of Buildings Directive (EPBD) and the Energy Efficiency Directive (EED).

Easier permitting for renewable energy

projects through the introduction of renewable “go to areas” and a solar rooftop initiative providing an obligation for all public and commercial building to be equipped with solar panels are added to the new 2030 target of having a 45% share of renewables in the EU's final energy consumption. Europe's seaports expressed their support for the proposal. They agree that facilitating the permitting process is essential in progressing fast on the energy transition. The proposal is a way forward in recognizing the issues of complex administrative procedures. It is however important to understand that ports are complex entities and consist of multi-layered zones and overlapping activities. In its position on the issue, ESPO therefore stresses that the definition of go-to areas requires a functional approach on top of the geographical approach. Moreover, ESPO believes that reserving an area in the port only for renewable energy projects is not always feasible.

Energy Emergency Measures

On top of European initiatives to phase out Europe's dependency on Russian energy, ESPO has also been closely following the different measures and instruments proposed by the Commission to tackle the energy prices crisis.

Trans-European Energy infrastructure (TEN-E)

Over the last working year, ESPO also followed the final legislative developments on the revision of the regulation establishing guidelines for Trans-European Energy infrastructure (TEN-E). In June of this year, the revised TEN-E Regulation was officially published. The first Projects of Common Interest (PCIs) list adopted under the new rules is expected in autumn 2023.

Energy

ESPO- EFIP joint study on the new energy landscape: impact on and implications for European ports

End 2021, ESPO and EFIP commissioned a joint study “The new energy landscape: Impact on and implications for European ports” to the Royal Haskoning DHV consultancy. The aim of the study was to draw a comprehensive picture of the impact of the energy transition on Europe’s seaports, in particular in terms of new infrastructure needs or adaptation of existing infrastructure. This study is intended for both the port authorities and the policy-makers. It was presented during the ESPO Annual Conference in Valencia on 1 June 2022. Members of the Energy network were closely involved in the making of the study and in identifying the different areas/factsheets to be examined in the study.

Hydrogen

Ever since the Commission published its Hydrogen Strategy on 8 July 2020, the Energy network has consistently been following up all relevant policy developments regarding hydrogen. On 15 December 2021, the European Commission presented a package comprising proposals aiming at creating a single European market for hydrogen by 2030. The revision of the existing Gas Directive and Regulation stands out among them as the missing pieces of a solid regulatory framework for hydrogen. Moreover, to guarantee the purchase of hydrogen and to bridge the investment gap, the Commission announced the creation of an EU Hydrogen Bank funded by €3 billion from the Innovation Fund.

Clean Hydrogen Partnership - Deloitte study on hydrogen in ports and industrial coastal areas

Clean Hydrogen Partnership commissioned a study on hydrogen for ports and industrial coastal areas to Deloitte. Since last year, ESPO is part of the Advisory Board for the study. The study aims at enabling the creation of a European Hydrogen Ports Roadmap. It will also feature economic forecasts based on a variety of business models for the transition to renewable hydrogen in ports, while presenting new case studies and project concepts. ESPO invited the consultants to an Energy network meeting early on in the year to present and discuss the ongoing work on the study.

Year in Review



ESPO Award 2021

Role of ports in the recovery of the city and the local community



Out of [eleven submissions](#) and four shortlisted projects, [Port of Gdansk Authority was the winner of the 13th edition of the ESPO Award](#), in recognition of its role in the recovery of the city and the local community. The ESPO Award was handed out by Walter Goetz, Head of Cabinet of Adina Vălean, the Commissioner for Transport, during the traditional ceremony and dinner which took place in November 2021 at the Museum of Natural Sciences in Brussels.

The Port's project "WE ARE – unification of local community of Gdańsk's districts Nowy Port and Stogi with its old neighbour, the sea port" promoted values of cooperation, solidarity and responsibility. Efforts focused on the residents of two districts of Gdańsk: Nowy Port and Stogi. During the longest lockdown, the Port funded and distributed 8000 meals to seniors who were most exposed to the risk of contracting COVID-19, purchased medical equipment for Pomeranian hospitals to combat the coronavirus, supported local sports clubs to continue training, and supported two local initiatives.

ESPO Conference 2022

2 – 3 June | Valencia

The 18th edition of the annual ESPO Conference took place on 2-3 June 2022 in Valencia, kindly hosted by the Port Authority of Valencia, around the theme "Empowering Europe's ports".

The ESPO Conference 2022 tackled the challenges of European ports as they are no longer operating in a societal, commercial, and geopolitical safe and stable environment as they were during the last decades. The global health crisis over the last two years and the war in Ukraine were discussed, bringing up the requirements of ports to be agile and resilient at all times. At the same time, speakers and panellists pointed out the challenges of the contemporary multipolar world, where Europe is trying to achieve strategic autonomy, thereby safeguarding a stable trade and economic environment and ensuring the security of supply of critical raw materials and goods. The overarching topic of discussion was this disruptive societal, commercial, and geopolitical environment taking place at a time where ports are setting course to realise Europe's ambition and prepare for a carbon-neutral and digitally smart future. The conference gathered around 270 participants.

The presentations given during the conference can be found [here](#).

The next ESPO Conference will take place in Bremen on 1-2 June 2023.

Events organised, co-organised or supported

- ESPO Award 2021 Ceremony, 9 November 2021, Brussels
- ESPO Conference 2022, 2-3 June 2022, Valencia
- GreenPort Cruise & Congress, 18-20 October 2022, Bruges

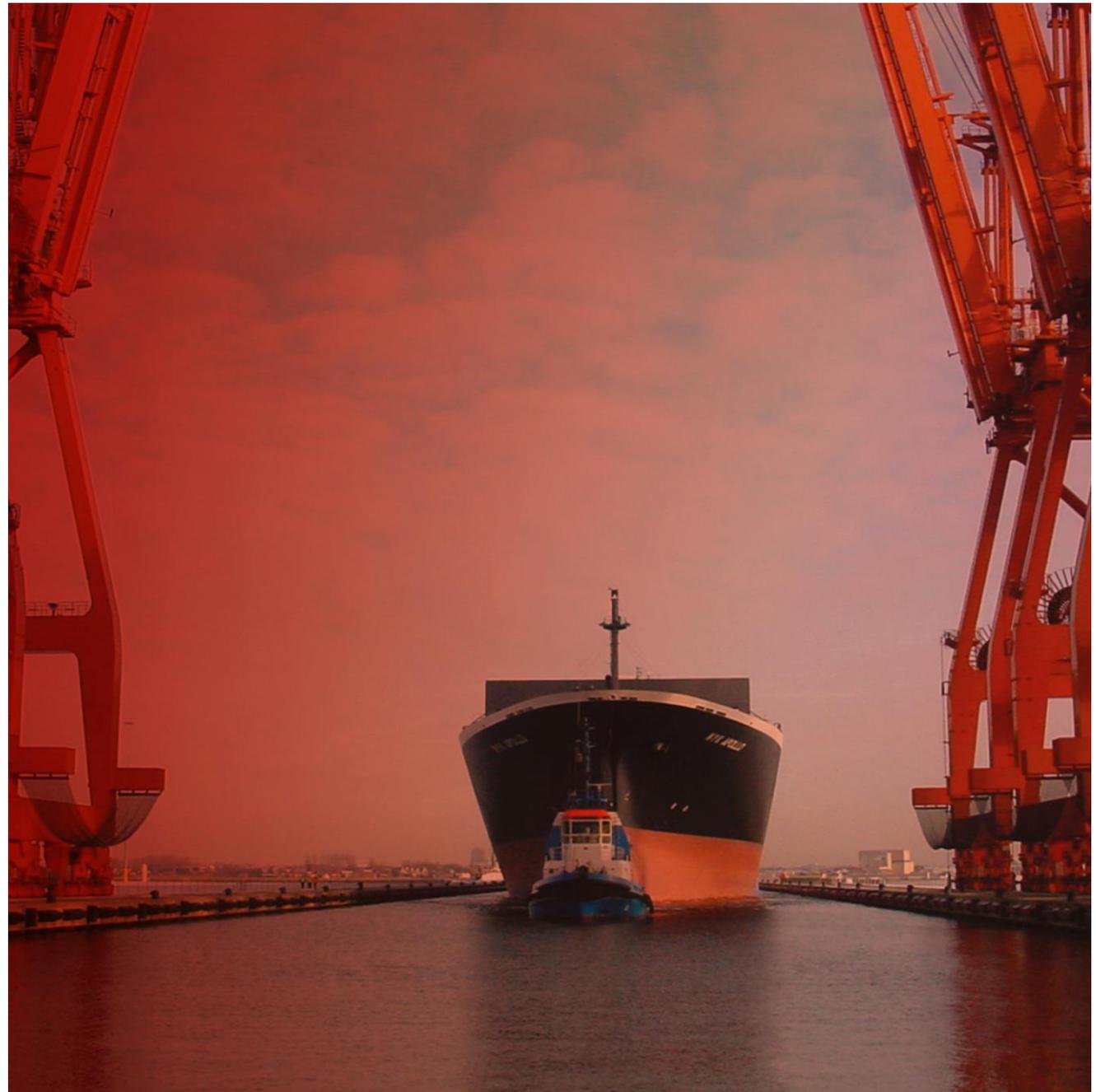
Publications

- ESPO Award 2021 Booklet with Summary of Applications
- ESPO Environmental Report 2022
- Top 10 Environmental Priorities 2022
- ESPO-EFIP joint study: The New Energy Landscape
- Trends in Ports' Governance 2022

Information on the above events and publications can be found on the ESPO website: www.espo.be, in particular under the sections 'Our events', 'Our publications', and 'Our news'.

Port pro of the month

Each month, ESPO interviews a CEO or Port Director from one of its member ports to highlight how each port works and to help us understand what it means to lead a European port. Below you will find a selection of quotes from interviews of the last twelve months. Read the full interviews by clicking on the pictures below.





Sergio Prete
*(Port of Taranto,
October 2021)*

Ports play a fundamental role in the decarbonisation of the transport and the logistics chain. Notably, they can adopt valuable initiatives aimed at reducing environmental impacts; therefore, port management bodies can promote a meaningful dialogue with shipowners to identify technical solutions relating to alternative fuels.



Torbjörn Witting
*(Port of Kokkola,
November 2021)*

Hydrogen and all of the renewable energy concepts are very exciting. The challenge will be the intermediate storage of electricity – we believe that hydrogen will play a definite and important part in this. We have hydrogen start-ups connected to the Port and Kokkola Industrial Park (KIP) next to the Port area.



Ansis Zeltiņš
*(Freeport of Riga,
December 2021)*

The future of sustainable port operations lies in each port's ability to effectively implement in its DNA emission neutrality, energy efficiency and innovation. In Riga, we put our bet on digitalisation of logistic corridors and that means digitalisation of not only port operations, but all transportation food chain from door to door.



Dirk Declerck
(Port of Oostende, January 2022)

Whilst some people might still think that spending money in safety and environmental care is a cost, it should be clear that safety is not a cost but an utmost important investment to ensure the continuity of every company. As we give concessions for land, which is of course only one of our activities, we are responsible for the environment.



Anna-Mihneva Natova
(Bulgarian Ports Infrastructure Company, February/March 2022)

Not only is climate resilience crucial for making port infrastructure reliable for the future, but also cybersecurity and inland connections are a key priority for port development. As a critical infrastructure, we note the various proposals to strengthen the tools for assessing any security or public order risks.



Mériadec Le Mouillour
(Port of Brest, April 2022)

Our environmental policy focuses on maintaining healthy ecosystems, taking action to mitigate and adapt to climate change, and advancing responsible practices in infrastructure and throughout the global supply chain.



Fátima Lopes Alves
(Port of Aveiro, May 2022)

Cooperation with local authorities is absolutely essential to promote decarbonization and green and intelligent mobility to improve the air quality and health of the surrounding cities, contributing to the global objective of fighting and minimising climate change.



Koen Overtoom
(Port of Amsterdam, June 2022)

Our vision of clean shipping aims for emission-free vessel traffic in our port area by 2050; in other words, no more air-polluting emissions and, as regards greenhouse gases, climate-neutral emissions from well to wake. We are taking actions now towards that objective, so that by 2030 we can see an acceleration in achieving this ambition.



Dennis Jul Pedersen
(Port of Esbjerg, July/August 2022)

Whereas it took approximately 28 days to install the first offshore wind turbine 20 years ago, it now takes only 12 hours. One of the challenges from the port perspective is to have large areas available and be willing to rent it for a short time (a few months lease). This is not the business model ports are used to work with compared to the usual Ro-Ro and container terminals.



**Konstantinos
Chatzikonstantinou**
*(Alexandroupolis Port Authority,
September 2022)*

My vision for the port of Alexandroupolis is that it will be transformed into a logistics gateway for the wider Balkan region. At the same time, on the western side of the port, tourism development is planned through the construction of a marina for yachts.



Jacek Sadaj
(Port of Gdynia, October 2022)

Port managing bodies have a pivotal role in the digitalisation of the supply chain as facilitators between all parties involved in port operations, both sea - shore and port - hinterland.

Year in pictures





How ESPO works



ESPO's Structure



Annaleena Mäkilä



Daan Schalck



Zeno D'Agostino

ESPO's membership consists of port authorities, port administrations and port associations of the seaports of the European Union and Norway. Furthermore, the organisation has observer members from the following European countries adjacent to the EU: Albania, Iceland, Israel, Montenegro, Ukraine and the United Kingdom. Montenegro joined ESPO as observer in 2022.

The membership structure of ESPO is organised on a national level. This finds its reflection in the General Assembly of the organisation, where each ESPO member EU member state has three official delegates with voting rights. Observer members have

one delegate each. The General Assembly sets the overall policy of the organisation and meets twice a year. It elects the Chairman and two Vice-Chairs. For the period 2020-2022, ESPO has been chaired by [Annaleena Mäkilä](#) (Finland), assisted by Vice-Chairs [Daan Schalck](#) (Belgium) and [Zeno D'Agostino](#) (Italy). The General Assembly mandates the daily policy-making of the organisation to the Executive Committee, which consists of one representative per member state and, upon invitation, representatives of observer countries. The Executive Committee meets about five times a year.

Members

The following national port associations and port administrations are members of ESPO: Bulgarian Ports Infrastructure Company, Croatian Port Authorities Association, Cyprus Ports Authority, Danish Ports, Finnish Port Association, Union des Ports de France (UPF), Hellenic Ports Association (ELIME), Irish Ports Association, Associazione Porti Italiani (Assoporti), Transport Malta, Norwegian Ports, Association Ports of Portugal (APP), Administrația Porturilor Maritime S.A. Constanța, Puertos del Estado, Ports of Sweden.

The following members countries are represented by their ports directly: Belgium, Estonia, Germany, Latvia, Lithuania, Netherlands, Poland and Slovenia. The following observer member country is represented by its port directly: Albania.

The full list of ESPO members can be found on ESPO's website: www.espo.be/membership-overview

ESPO welcomes Montenegro's ports as observer member

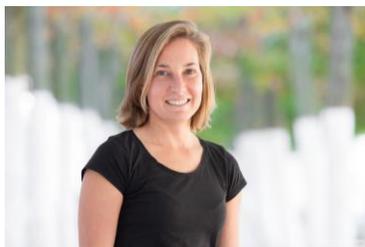
Montenegro's Ports [joined ESPO officially as an observer member on 1 June 2022](#). Montenegro is preparing itself for accession to the European Union. Montenegro's Ports play an undoubtedly important role in the economy of the country as main gateways for its trade and are important players for tourism in the region.

ESPO Secretariat



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Secretary General



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Personal Assistant, Events and Communication Assistant



Saran Touré

Personal Assistant, Event Manager



Pernelle Picat

Administrative and Event Assistant

Trends in ESPO

All technical committees together, women represent **34,30%** of the port professionals who attended ESPO meetings in 2021

In 2021, **470** port professionals participated to ESPO committee meetings

In the last year, ESPO published **8** positions papers

Since May 2021, ESPO organised **24** editions of the 'Morning Coffee' with its members, debriefing on relevant news happening in Brussels each week

The EcoPorts Network numbers **105** members in **25** countries, with **29** PERS-certified ports

Since 2009, **200** projects have been submitted for the ESPO Award on Social Integration of Ports

In the last year, ESPO published **53** press releases

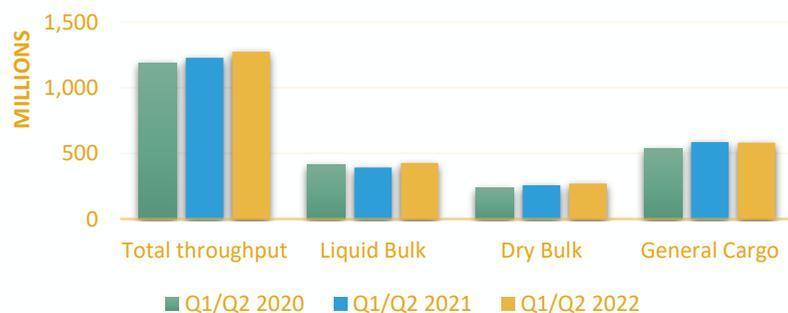
ESPO actively participated in around **100** events in the last year

Facts and Figures PortinSights



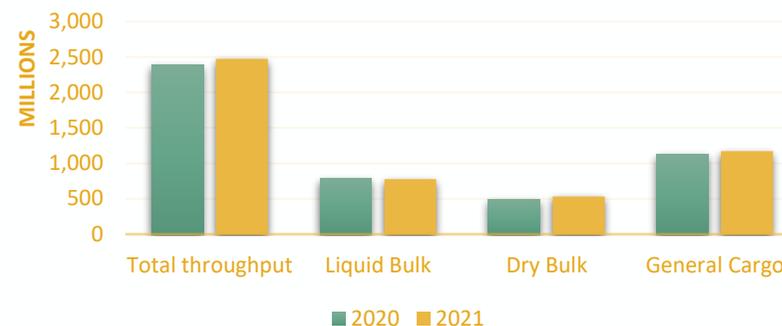
PortinSights is **ESPO's digital platform for European ports** to collect, share, compare and analyse their data. The digital platform includes throughput data, environmental data (EcoPorts) and governance data. In terms of throughput data, PortinSights currently represents over **70% of the total EU-27 throughput** and includes the **quarterly data** of 90+ European ports.

European ports (cumulative Q1 and Q2)



	2022 - 2020	2022 - 2021
Total throughput	+7,2%	+3,6%
Liquid bulk	+3,2%	+8,6%
Dry bulk	+12,7%	+4,4%
General cargo	+7,9%	-1,1%

European Ports (annual throughput)



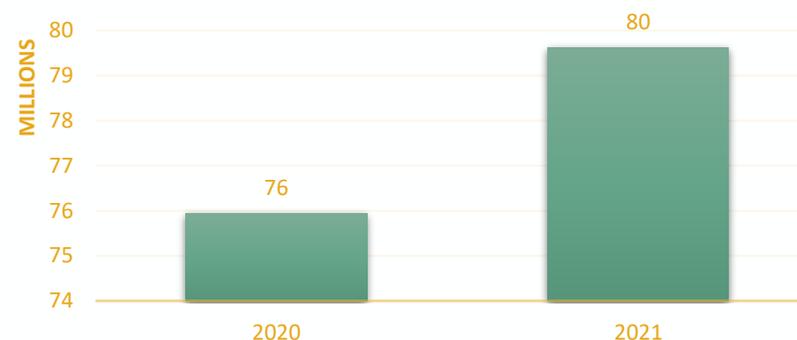
Total throughput	+3,7%
Liquid bulk	-0,9%
Dry bulk	+8,8%
General cargo	+4,7%

European ports: passengers (cumulative Q1 and Q2)



	2022 - 2020	2022 - 2021
Passengers	+59,3%	+86,8%

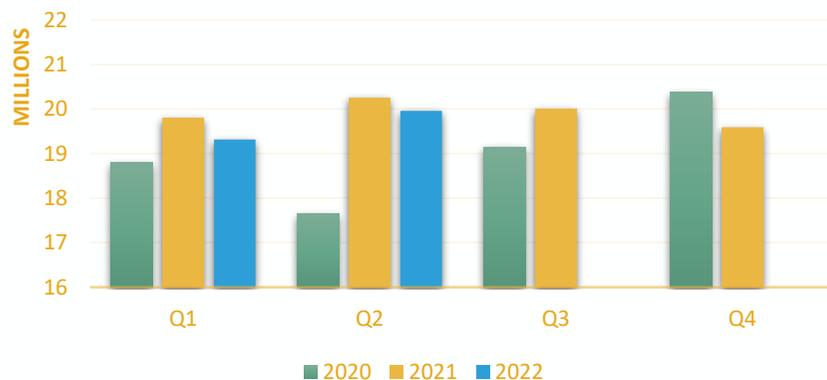
European ports: annual container (TEU)



Container TEU

+4,8%

European ports: container (TEU) quarterly

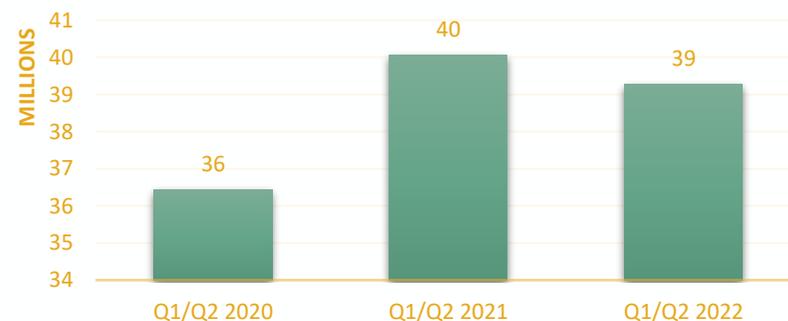


2022 - 2020

2022 - 2021

Q1	+2,8%	-2,5%
Q2	+13,1%	-1,4%
Q3	-	-
Q4	-	-

European ports: container (TEU) cumulative Q1 and Q2



2022 - 2020

2022 - 2021

Container TEU

+7,8%

-1,9%

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