



Europe's ports in a world of transition and change

Isabelle Ryckbost, European Sea Ports Organisation

Maritime Conference Luleå – 3 May 2023

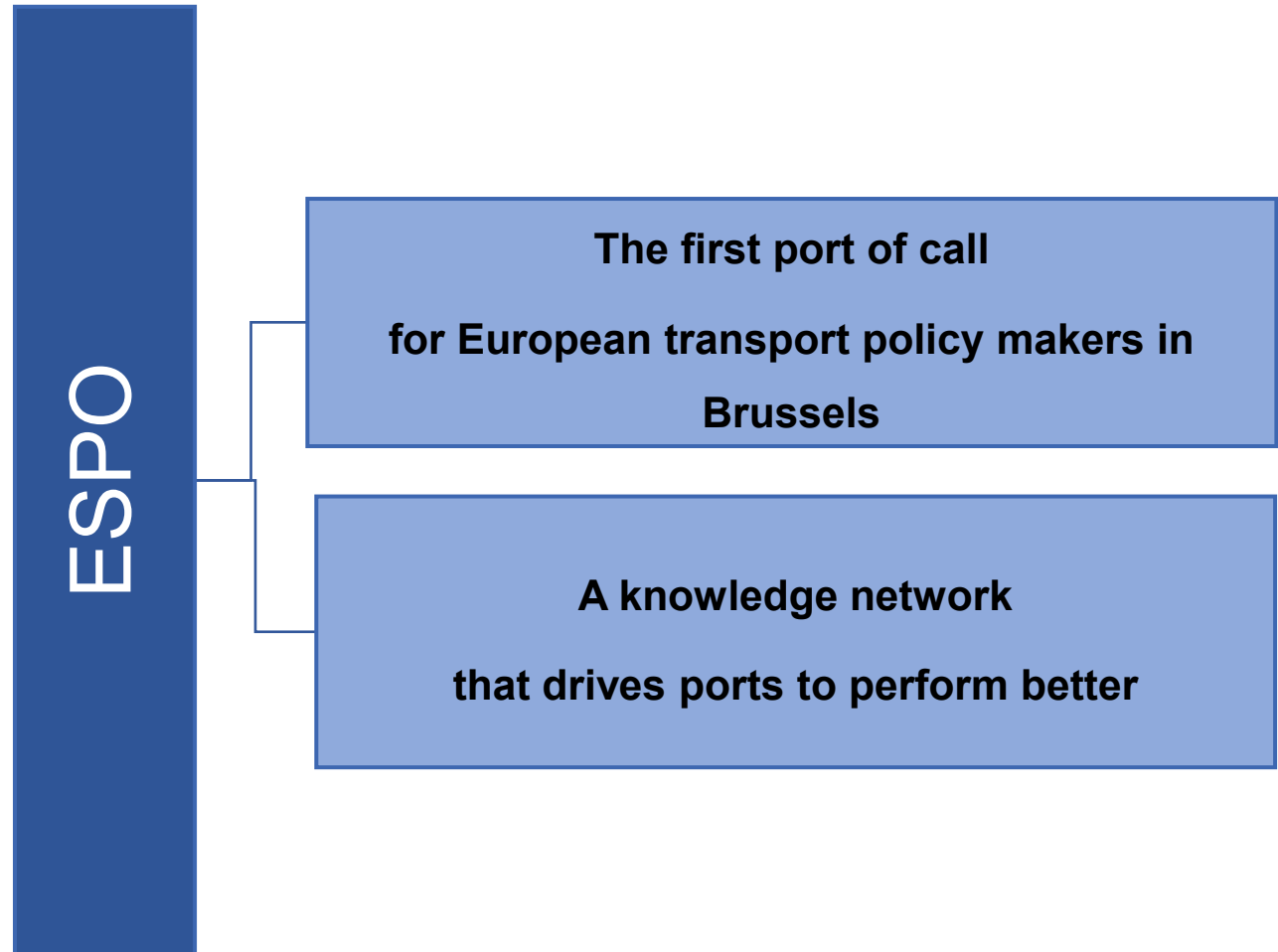


European Sea Ports Organisation

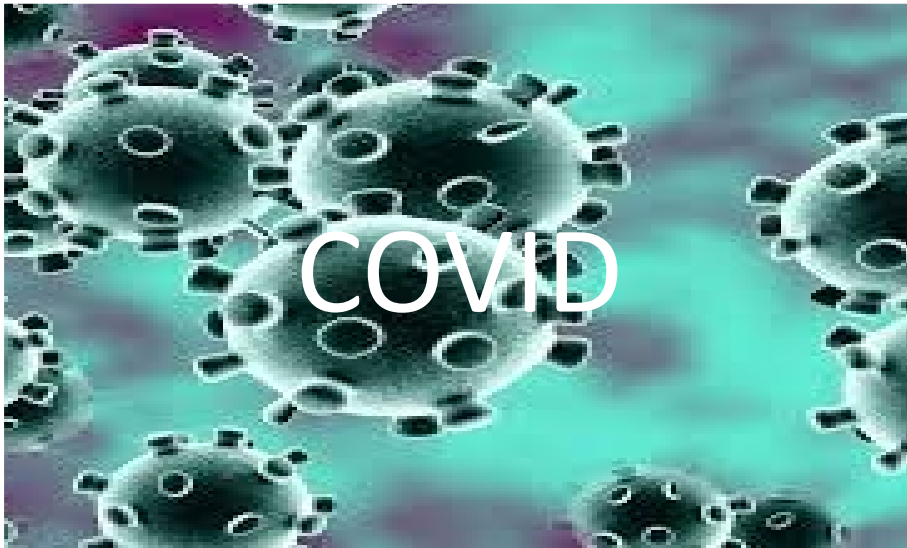


ESPO represents the port authorities, port associations and port administrations of the seaports of 22 Member States of the European Union and Norway at EU political level.

ESPO also has observer members in Albania, Iceland, Israel, Montenegro, Ukraine and United Kingdom.



The world is changing



THE DIFFERENT ACTIVITIES AND RESPONSIBILITIES OF EUROPEAN PORTS

Gateways to the world

Essential nodes of the multimodal transport chain

Hotspots for Europe's industrial activity

Nodes of energy

Safe and secure shelters

Hubs of innovation and digitalisation

Linking Europe's peripheral regions and islands to the mainland

Key players in the transport of passengers

Essential part of an emergency supply chain and facilitators of military mobility

Clusters of blue growth

PORTS ARE MULTITASKERS

What does it mean for ports? (1)



- **Ports do more than before:** Ports are taking up new roles and responsibilities on top of the traditional roles;
- **Energy Transition: ports are part of the problem, but also part of the solution:** Ports are partners in the race to net zero : ports are not only takers of energy, but also makers and movers of energy;
- **Opportunities for ports are changing:** you do not need to be in the centre of Europe to play a central role;
- **Size does not matter:** both big and small ports can become a sustainable energy hub;
- **EU: from lifting barriers to building barriers:** goes to the core of ports business as gateways to trade (new connectivities, friend/nearshoring?)
- **Both commercial and public role of ports is gaining importance:** less state aid and corporate tax vs military mobility, emergency supply chains, green investments, etc.;
- **New governance role:** from land lord to investor, operator?

What does it mean for ports? (2)



- **Uncertainty: technological, economical, geopolitical;**
- **The long term thinking and long lead times for port investments are problematic** in a world that changes overnight;
- **Cooperation:** challenges exceed the capacity of one port, one stakeholder, one economic player: cooperation both among ports and between ports and other stakeholders is important;
- **Changing balance of powers:** shipping (from horizontal alliances to vertical integration), role of new energy players (offshore);
- Impact on hinterland **connectivities**, new connectivities and on use of **hinterland modes**;
- **Space problem:** energy transition requires a lot more space than fossil fuels hydrogen 5 times more space needed): reason: less density, safety parameters, and storage: is their space in Europe?

What about European policy: from package to package



Green Deal
Ambition:
Net zero by 2050

Fit for 55
OPS in ports
Greening path for
shipping
Shipping in ETS
Taxation of
conventional
maritime fuels?

TEN-T policy review

REPowerEU
Short term: Guarantee
energy security
(independency)
Accelerate the deployment
and use of renewable
energy
Offshore wind: 60GW by
2030 – 300GW 2050
Hydrogen: produce 10
million tonnes – import 10
million tonnes by 2030

Funding schemes: Recovery Fund
Sovereignty fund, Innovation Fund ...

**Net-Zero Industry
Act**
Benchmark: 40% of
need of net zero
technologies must be
produced in EU by 2030
10% of needed critical
raw materials produced
in EU by 2030, 40% out
of processing, and 15%
out of recycling in EU



The ambitions are right: net-zero, increase energy independency, building resilience, strategic autonomy, etc.

Tools are not away fit for purpose:

- Not enough trust in stakeholders/ industry to define the best way: ex. Onshore power supply
- Funding mechanisms: from “financing” to “mobilisation” of funds
- Divergences between Member States: ex. Recovery Fund (SP/IT: 20%, Sweden 1.24% of total envelope), new State aid ease measures (risk of distortion?)
- Strategic autonomy: Foreign Direct Investment screening: fine but could also discourage good FDI
- Silo thinking remains in policy making

What do ports need? To-do's (in policy):



- 1. Assess the importance of a port not only in tonnes, TEU: Adding the energy criterion for ports in TEN-T*
- 2. Pipelines to be recognised as mode of transport*
- 3. Increase the funding for ports: ports are facing a lot of investments with added value for economy and society but not for the investing port authority*
- 4. Economic transition of ports: reflect on business model*
- 5. Safeguard competitiveness of EU ports (e.g. danger with ETS – US IRA)*
- 6. Need to build acceptance for new infrastructure: space impact – permitting must be eased (↔ nature conservation law proposal): ports are partners in green transition not game stoppers*
- 7. Regulatory breathing space: room for ports to manoeuvre, to adapt strategy*
- 8. Empower Europe's ports: strategic role of ports must be recognised and policy must translate this into financial and non-financial tools*

An aerial photograph of an industrial complex, likely a refinery or chemical plant, situated along a large canal. The facility features numerous large storage tanks, processing units, and industrial buildings. A prominent red and white building is visible on the right side of the complex. In the background, a series of wind turbines are installed in a line across a body of water, extending towards the horizon. The surrounding landscape includes green fields and some residential areas in the distance.

Thank you!
Isabelle.Ryckbost@espo.be

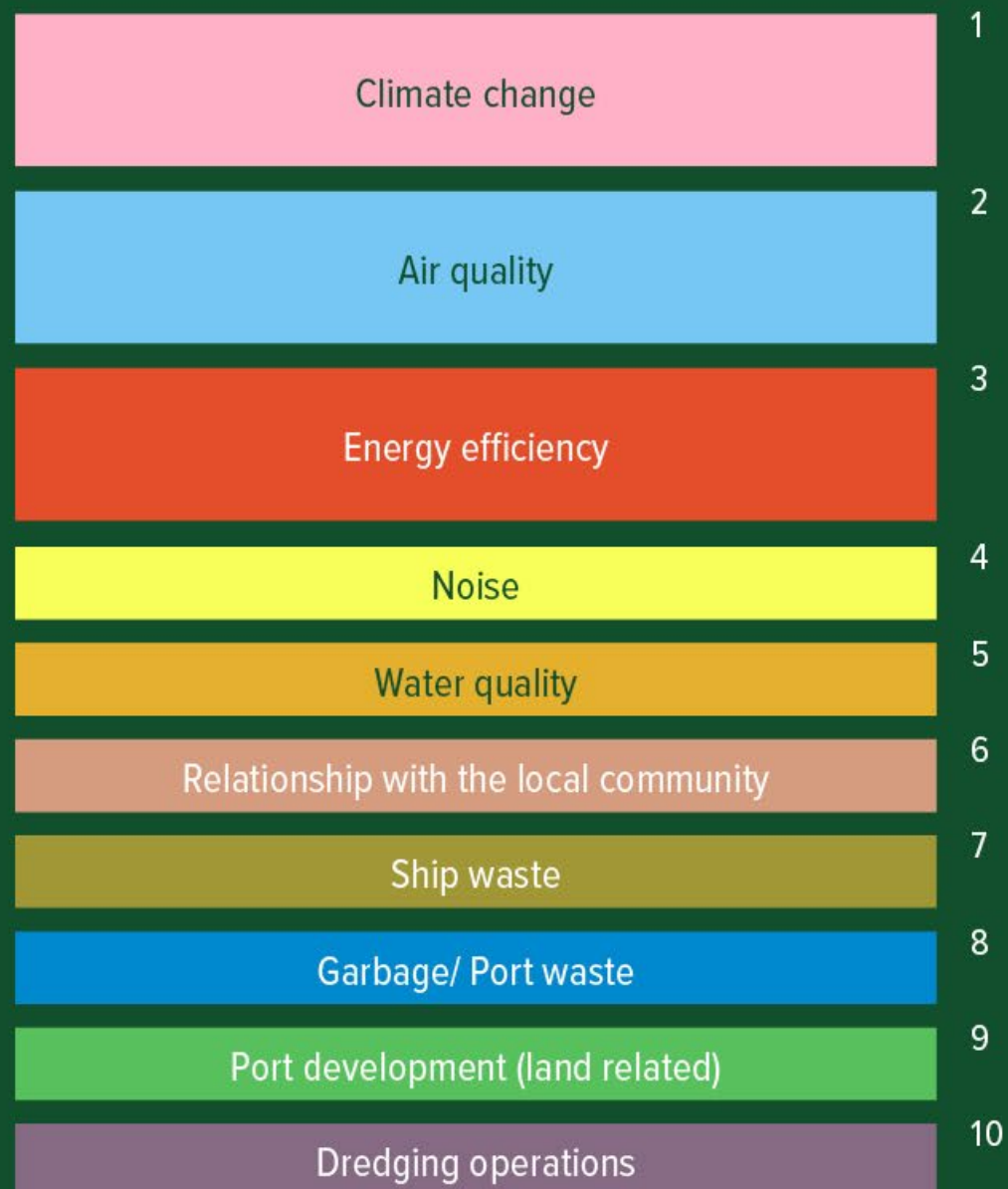
ESPO Environmental Report 2022

EcoPortsinSights 2022



TOP 10 ENVIRONMENTAL PRIORITIES OF THE PORT SECTOR IN 2022

2022



The new energy landscape

Impact on and implications for European ports





Deloitte



Europe's ports at the crossroads of transitions

A Deloitte and ESPO Study

June 2021

TRENDS IN EU PORTS' GOVERNANCE 2022

