

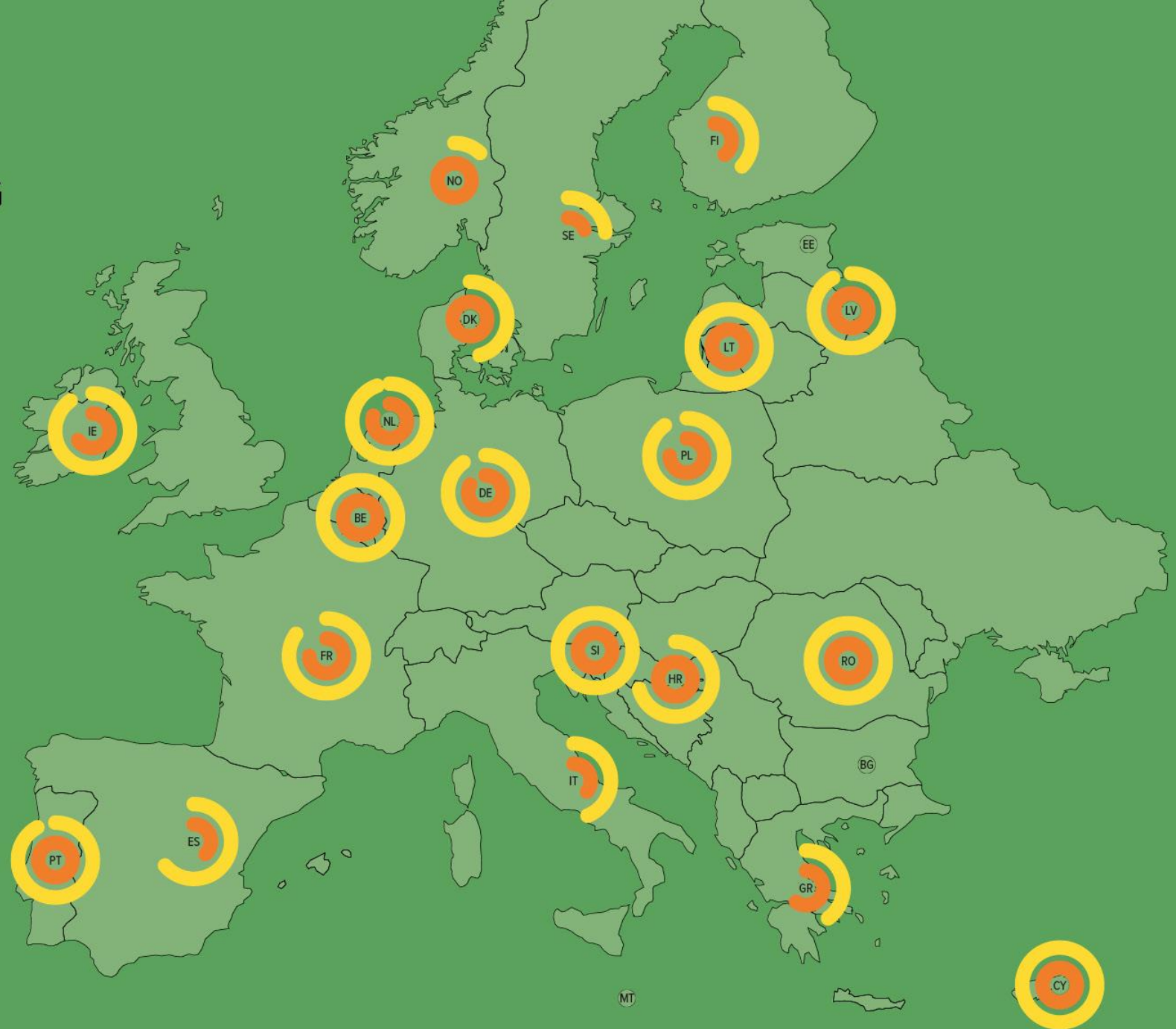
TRENDS IN EU PORTS' GOVERNANCE 2022



OVERVIEW OF RESPONDENTS TO THE FACT-FINDING SURVEY 2021 – 2022

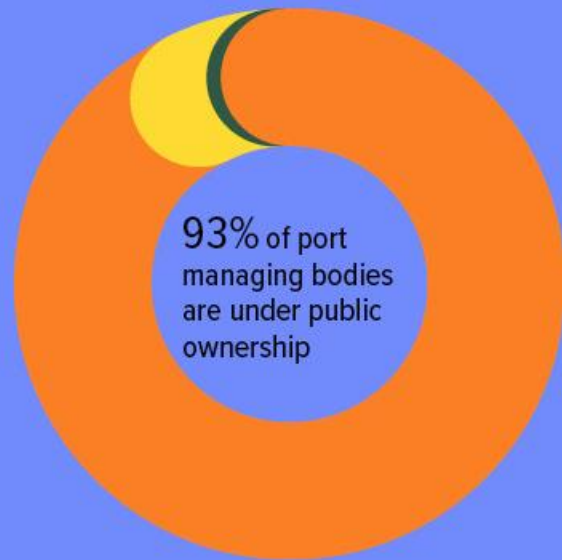
Differentiation according to region

- 24% North Sea
- 24% Baltic Sea
- 20% Atlantic
- 17% Western Mediterranean
- 13% Eastern Mediterranean
- 3% Black Sea



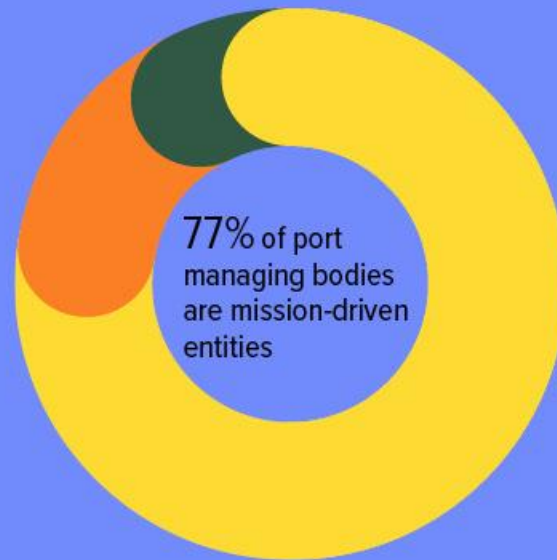
**BOTH PUBLIC
ROLE AND
COMMERCIAL
EXPECTATIONS
ON THE RISE**

BOTH PUBLIC ROLE AND COMMERCIAL EXPECTATIONS ON THE RISE



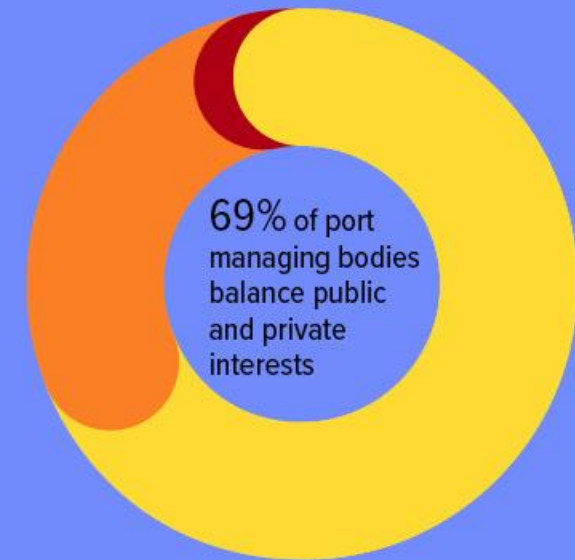
Ownership of EU port managing bodies

- 93% Public ownership
- 6% Mixed public- private ownership
- 1% Private ownership



Port managing body by type of organisation

- 77% A mission-driven entity where profit/cost recovery is a must but not the only consideration
- 15% A non-economic public body run with general interest objectives
- 7% A profit-maximising business



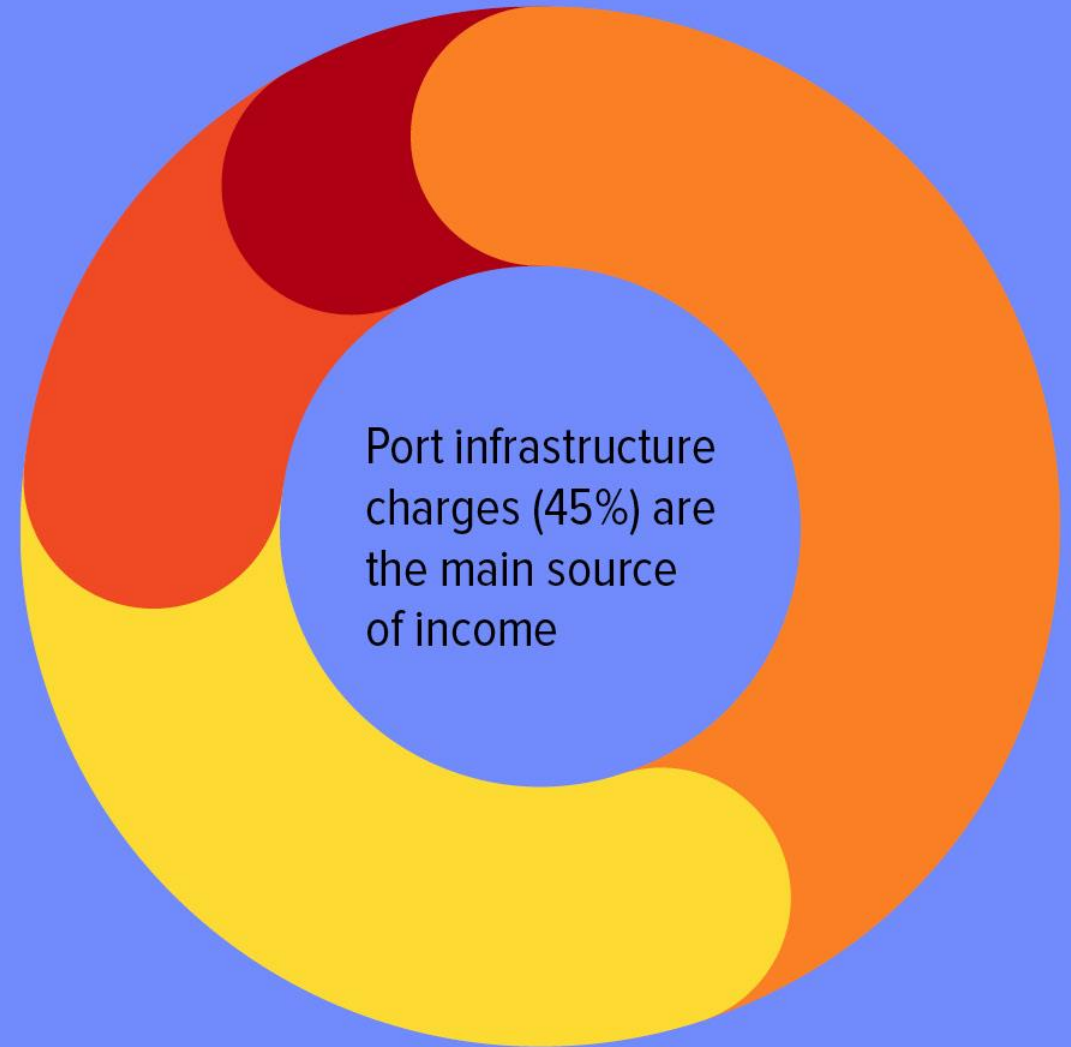
Goals of the port managing body

- 69% The balance between public and private interests
- 28% The realisation of public interests
- 3% The realisation of private interests

BOTH PUBLIC ROLE AND COMMERCIAL EXPECTATIONS ON THE RISE

Average percentage of port income source

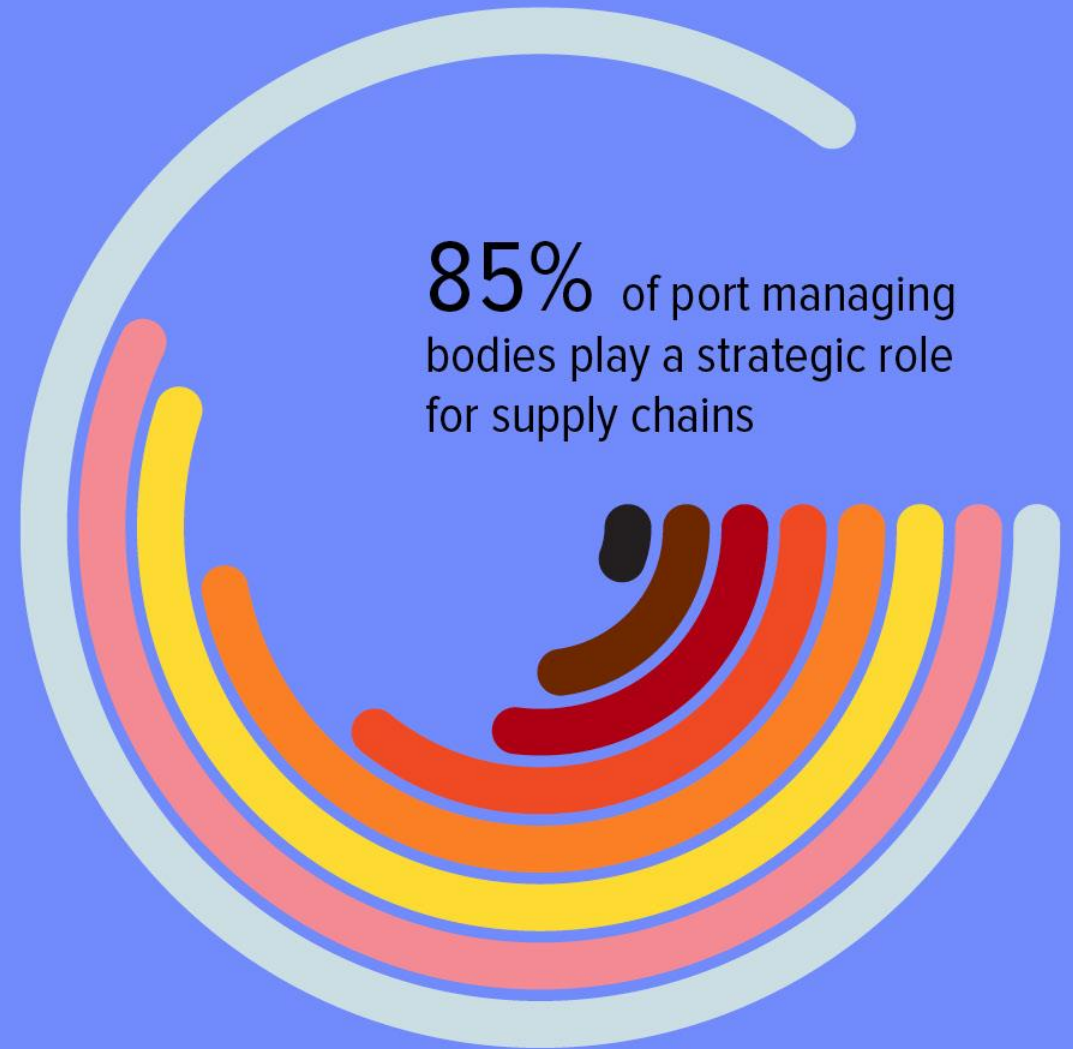
- 45% Port infrastructure charges
- 32% Land lease or concession fees
- 15% Services
- 8% Other sources



BOTH PUBLIC ROLE AND COMMERCIAL EXPECTATIONS ON THE RISE

Port activities considered strategic functions

- 85% Supply chain
- 57% Storage of goods
- 55% Passenger transport
- 47% Access to essential industries in the port
- 36% Energy supply
- 27% Energy storage
- 23% Energy production
- 6% Other

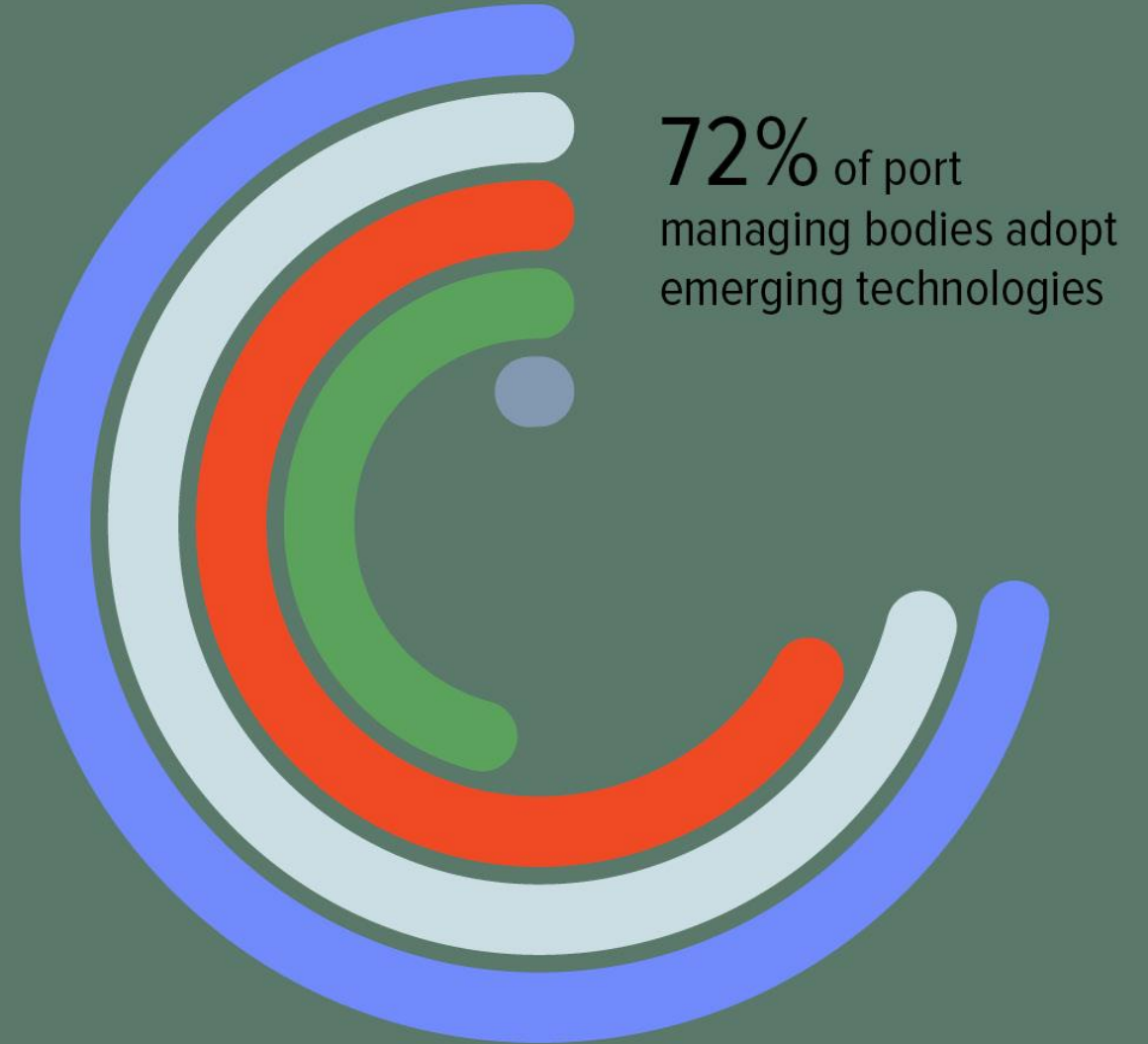


**ACTIVE
MANAGERS OF
AN EXTENSIVE
PORT ECOSYSTEM**

ACTIVE MANAGERS OF AN EXTENSIVE PORT ECOSYSTEM

Stimulating innovation in the port

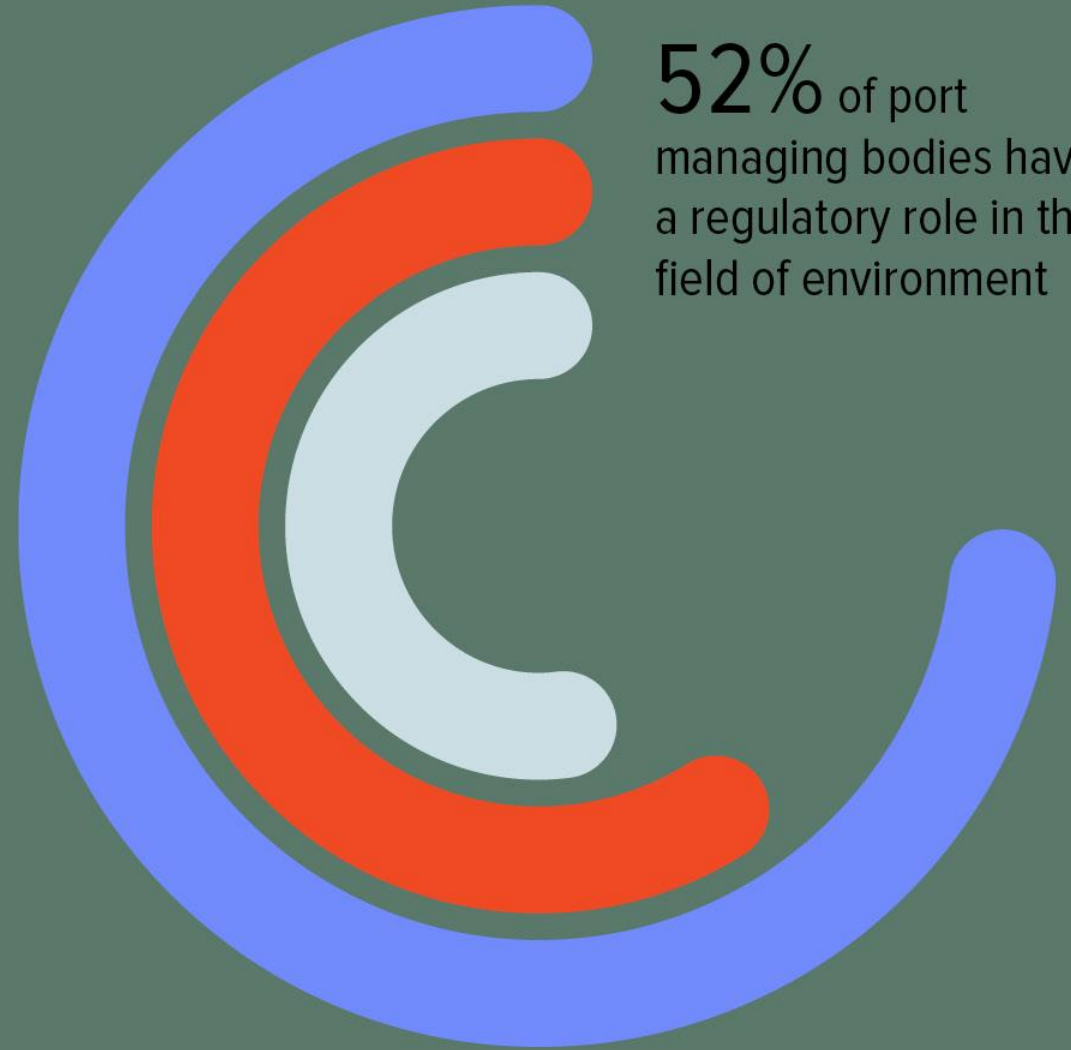
- **72%** Adopting emerging technologies and digitalisation
- **71%** Looking for new business models and opportunities for the Port Managing Body
- **67%** Partnering in projects with customers, port operators and other companies
- **46%** Creating an innovation ecosystem in the port
- **1%** Other



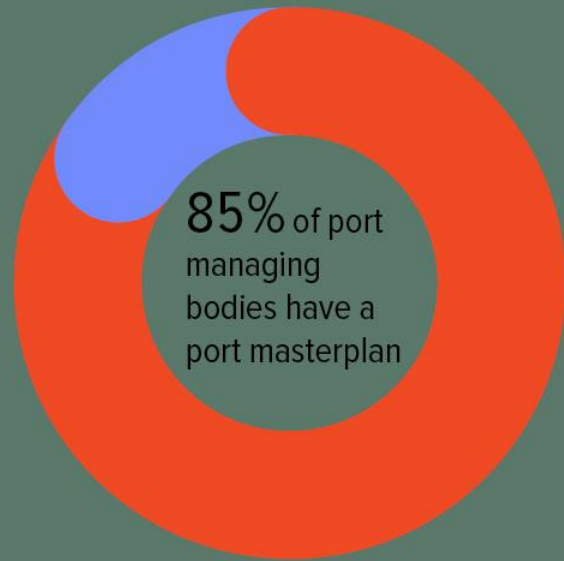
ACTIVE MANAGERS OF AN EXTENSIVE PORT ECOSYSTEM

Regulatory role of port managing bodies

- 73% Security
- 59% Safety
- 52% Environment



ACTIVE MANAGERS OF AN EXTENSIVE PORT ECOSYSTEM



Port managing bodies with a port masterplan

- 85% Yes
- 15% No

75% of port managing bodies involve the wider port community in the masterplan development



Categories of stakeholders involved in the development of the masterplan

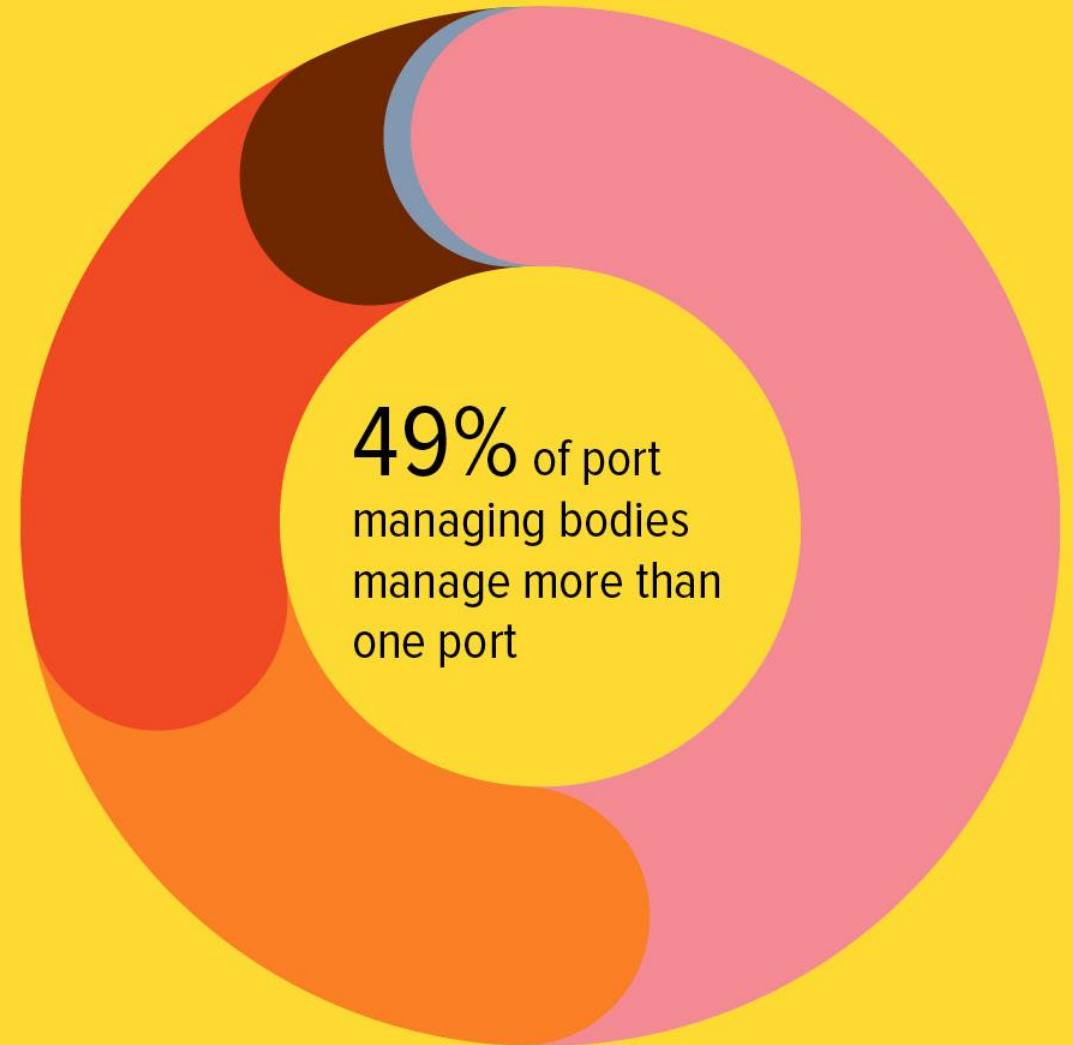
- 85% Internal stakeholders (employees, shareholders, ...)
- 78% External contractual stakeholders (shipowners, terminal operators, ...)
- 75% External non-contractual stakeholders (local authorities, citizens, NGO's, ...)
- 5% Others

**MORE
COOPERATION
WITHIN
AND BEYOND
THE PORT**

MORE COOPERATION WITHIN AND BEYOND THE PORT

Number of ports managed by the port managing body

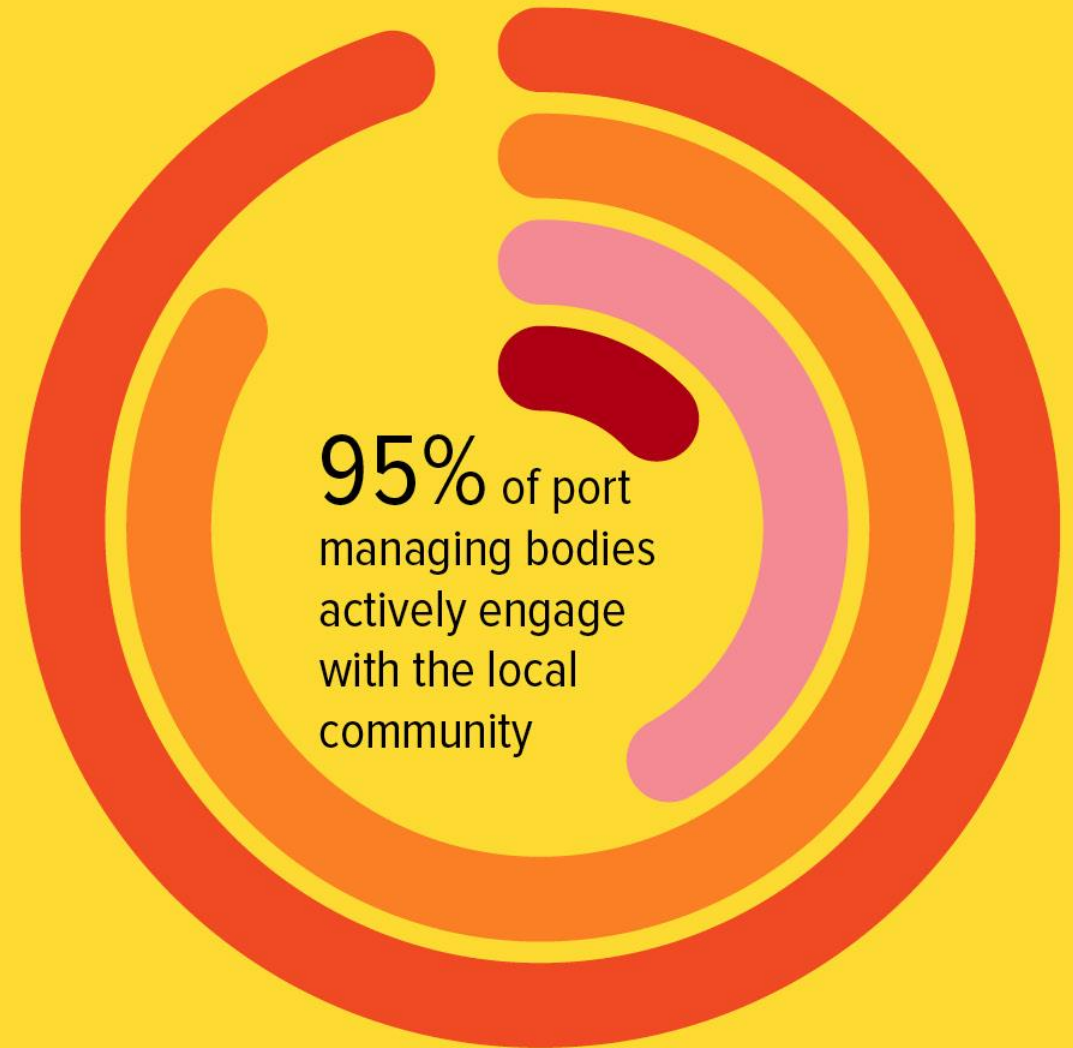
- 51% 1 port
- 21% 2 ports
- 21% 3 – 5 ports
- 6% 6 – 10 ports
- 1% 10+ports



MORE COOPERATION WITHIN AND BEYOND THE PORT

Initiatives led by the port managing body aimed at improving societal integration of port activities

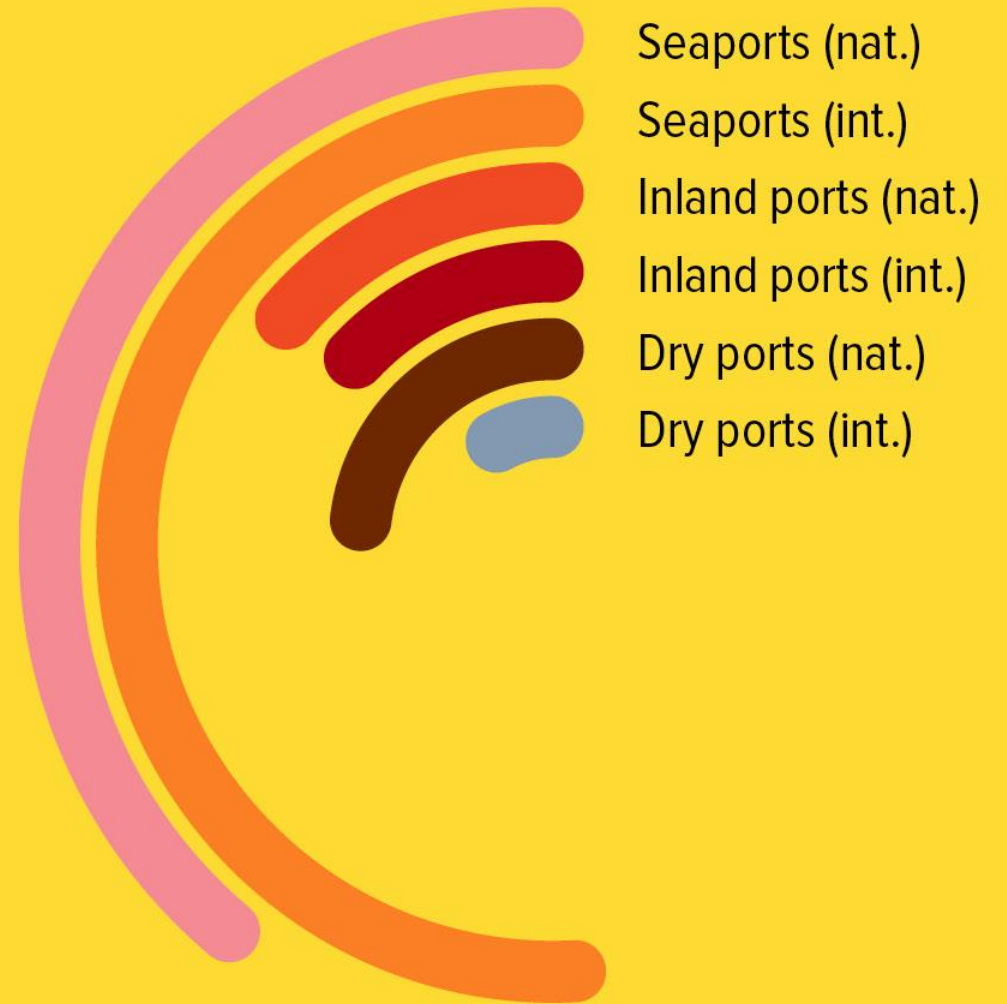
- **95%** Initiatives to establish cohabitation with local communities in and around the port area
- **84%** Initiatives to make society experience and understand the port
- **42%** Initiatives to attract young people to work in the port
- **13%** Other societal integration initiatives



MORE COOPERATION WITHIN AND BEYOND THE PORT

Partnerships with other seaports, inland ports and dry ports

- 39% Seaports at national level
- 51% Seaports at international level
- 14% Inland ports at national level
- 13% Inland ports at international level
- 23% Dry ports at national level
- 8% Dry ports at international level



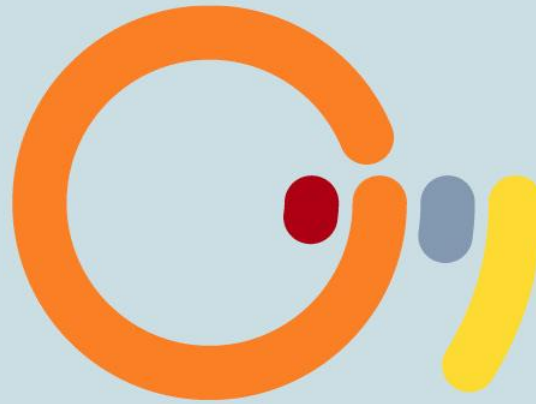
KEY PLAYERS IN THE SUPPLY CHAIN

KEY PLAYERS IN THE SUPPLY CHAIN



Port services to ships

- 26% Port managing body
- 11% Government
- 69% Private Operator
- 3% Other



Average of all services to cargo

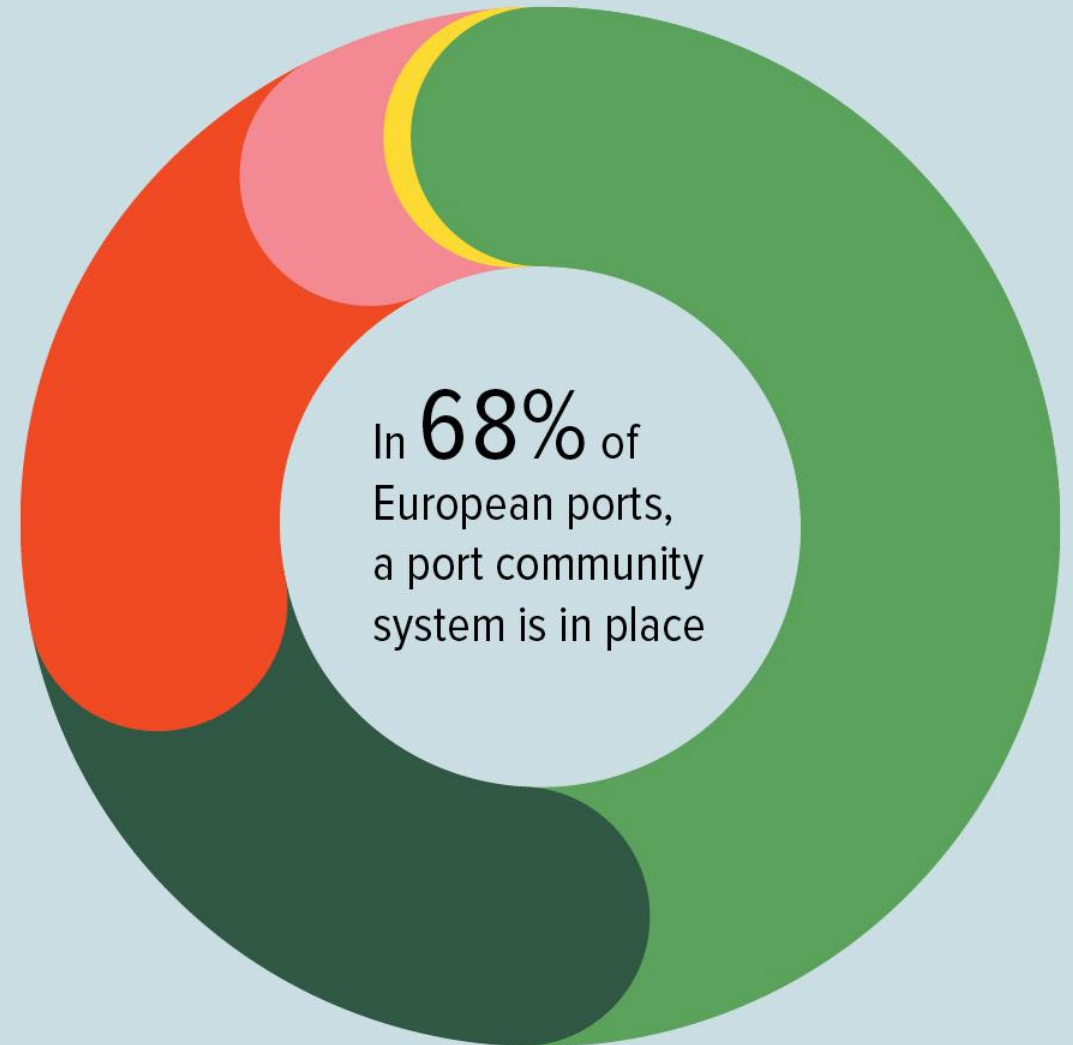
- 9% Port managing body
- 2% Government
- 95% Private operator
- 2% Other

Port services remain
in private hands

KEY PLAYERS IN THE SUPPLY CHAIN

Existence of port community system

- 32% No system available in the port
- 18% System operated by third party
- 28% System operated on non-cost recovery basis
- 15% System operated on cost recovery basis
- 7% System operated on profit basis

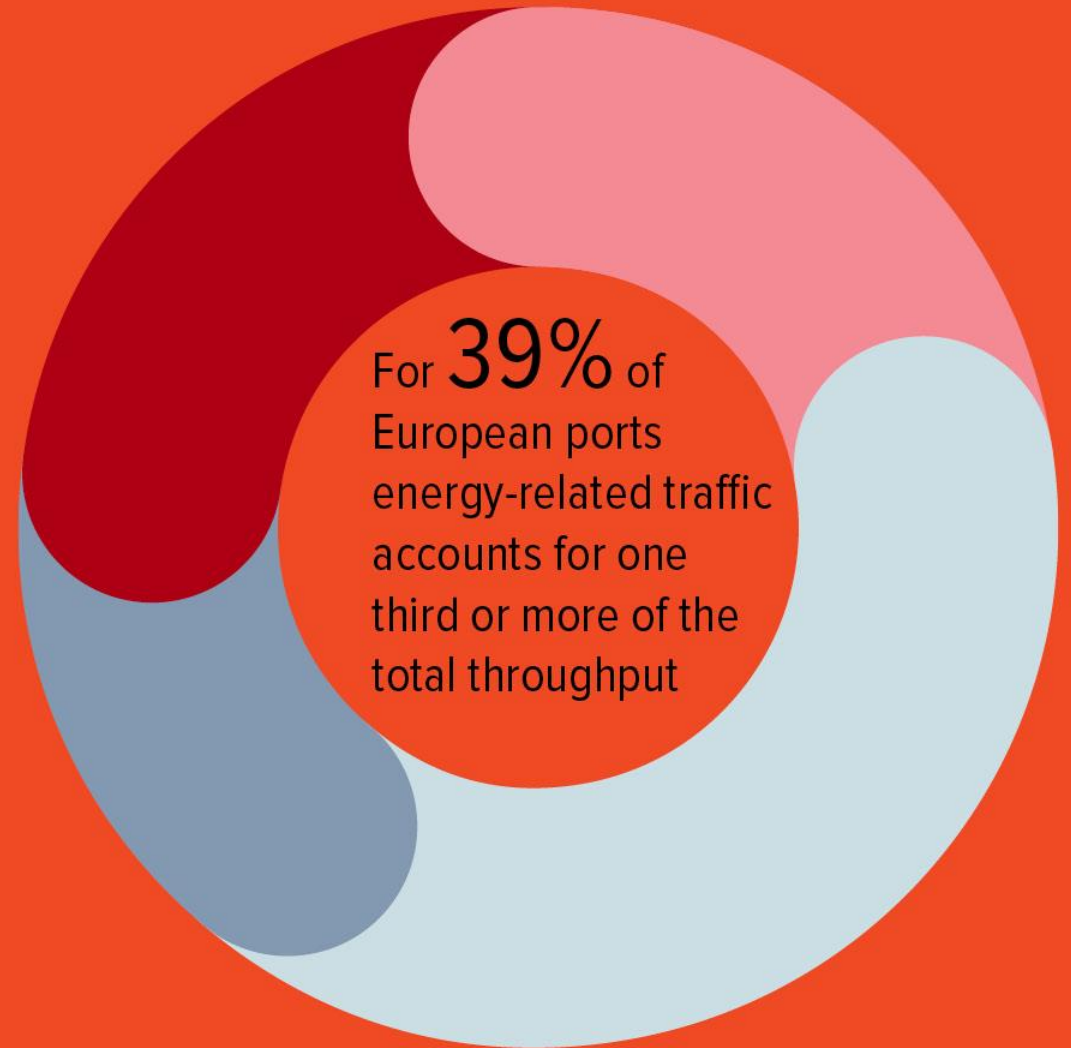


**ENERGY
INCREASINGLY
PART OF
THE PORT
BUSINESS**

ENERGY INCREASINGLY PART OF THE PORT BUSINESS

Approximate percentage of energy-related traffic in the port by volume

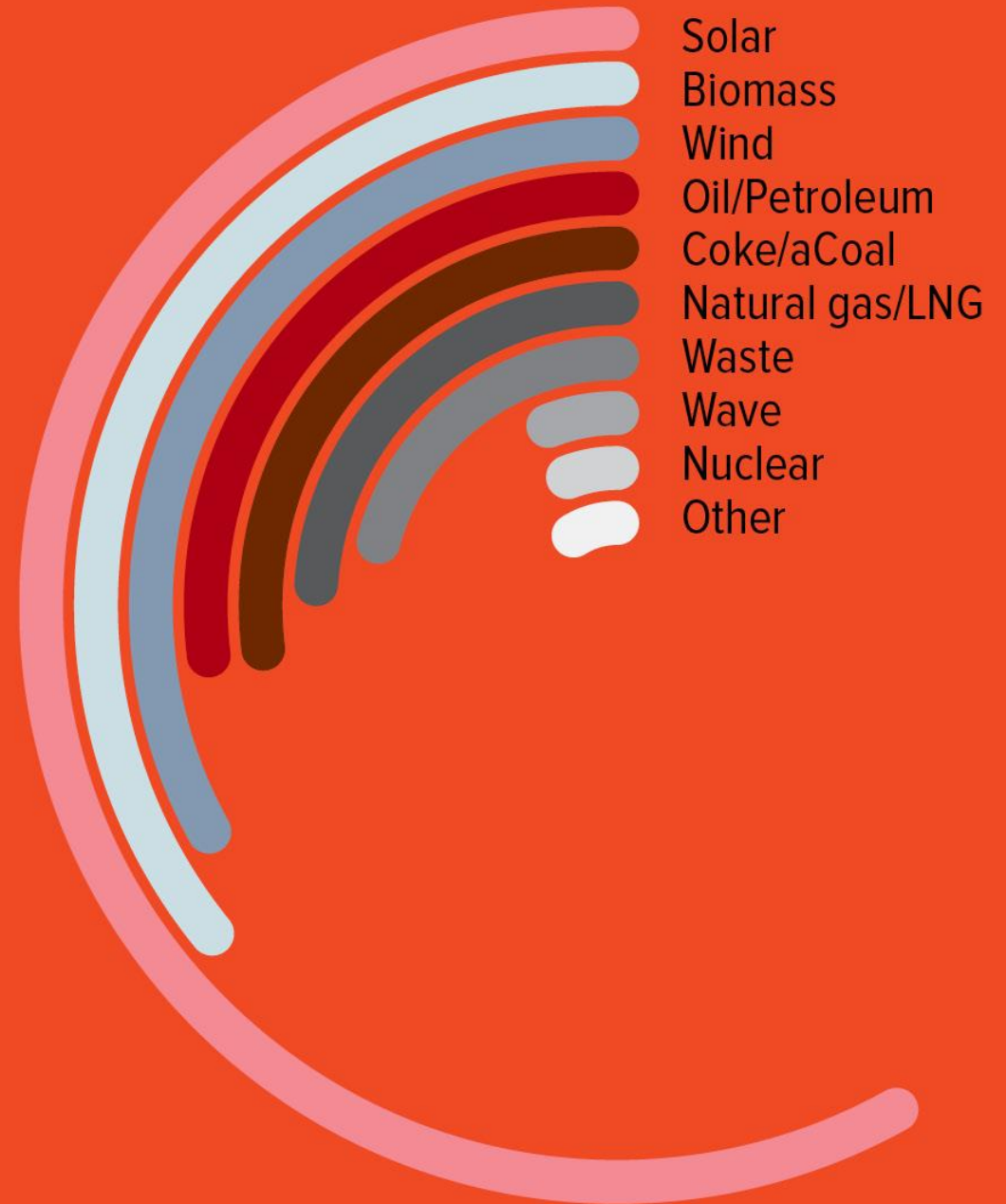
- 23% Less than 10%
- 39% 10% – 30%
- 16% 30% – 50%
- 23% More than 50%



ENERGY INCREASINGLY PART OF THE PORT BUSINESS

Energy sources for energy production in ports

- 58% Solar
- 36% Biomass
- 33% Wind
- 27% Oil/petroleum
- 27% Coke and Coal
- 24% Natural gas/LNG
- 21% Waste incinerator
- 6% Wave
- 6% Nuclear
- 9% Other

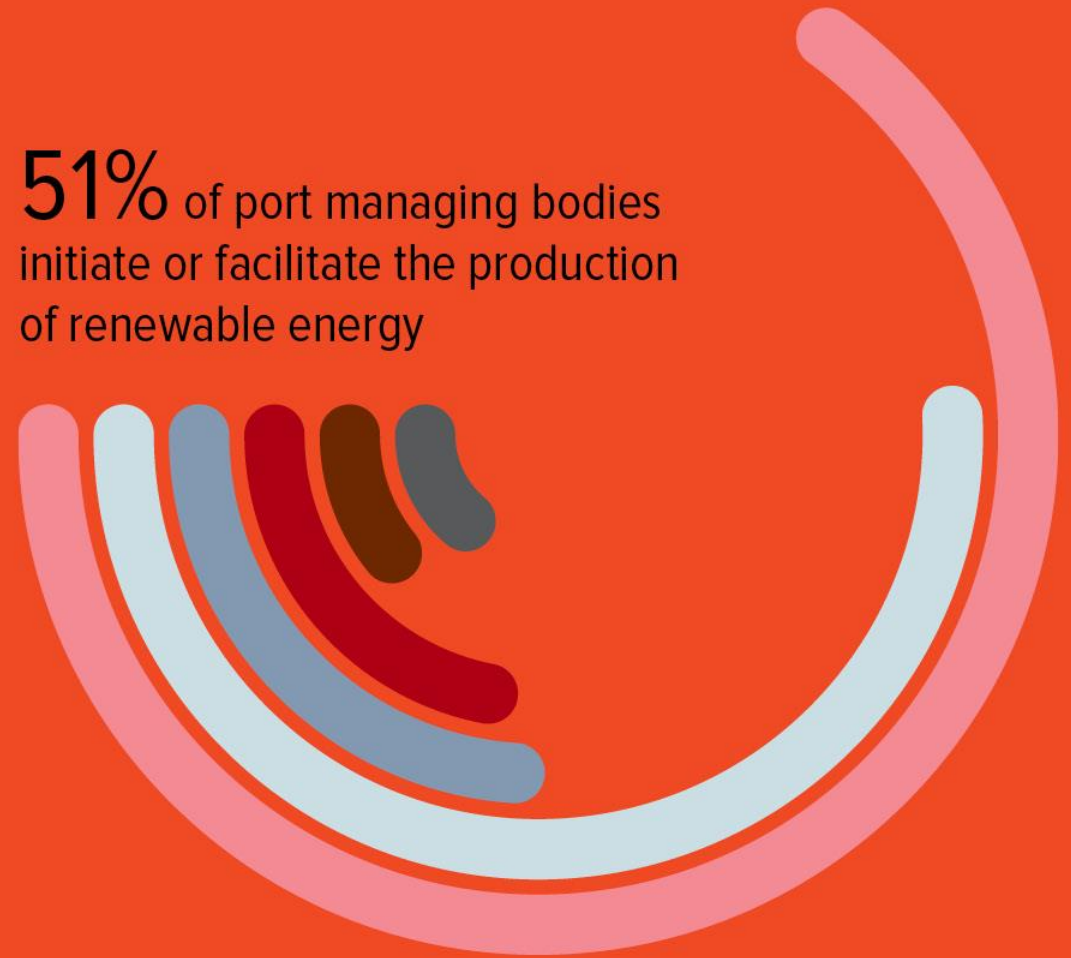


ENERGY INCREASINGLY PART OF THE PORT BUSINESS

Role of port managing body in the production of renewable energy

- 65% Provider of land
- 51% Initiator/facilitator
- 24% Investor/ co-investor
- 22% Logistics support
- 11% Operator of the facilities
- 14% Other roles

51% of port managing bodies initiate or facilitate the production of renewable energy

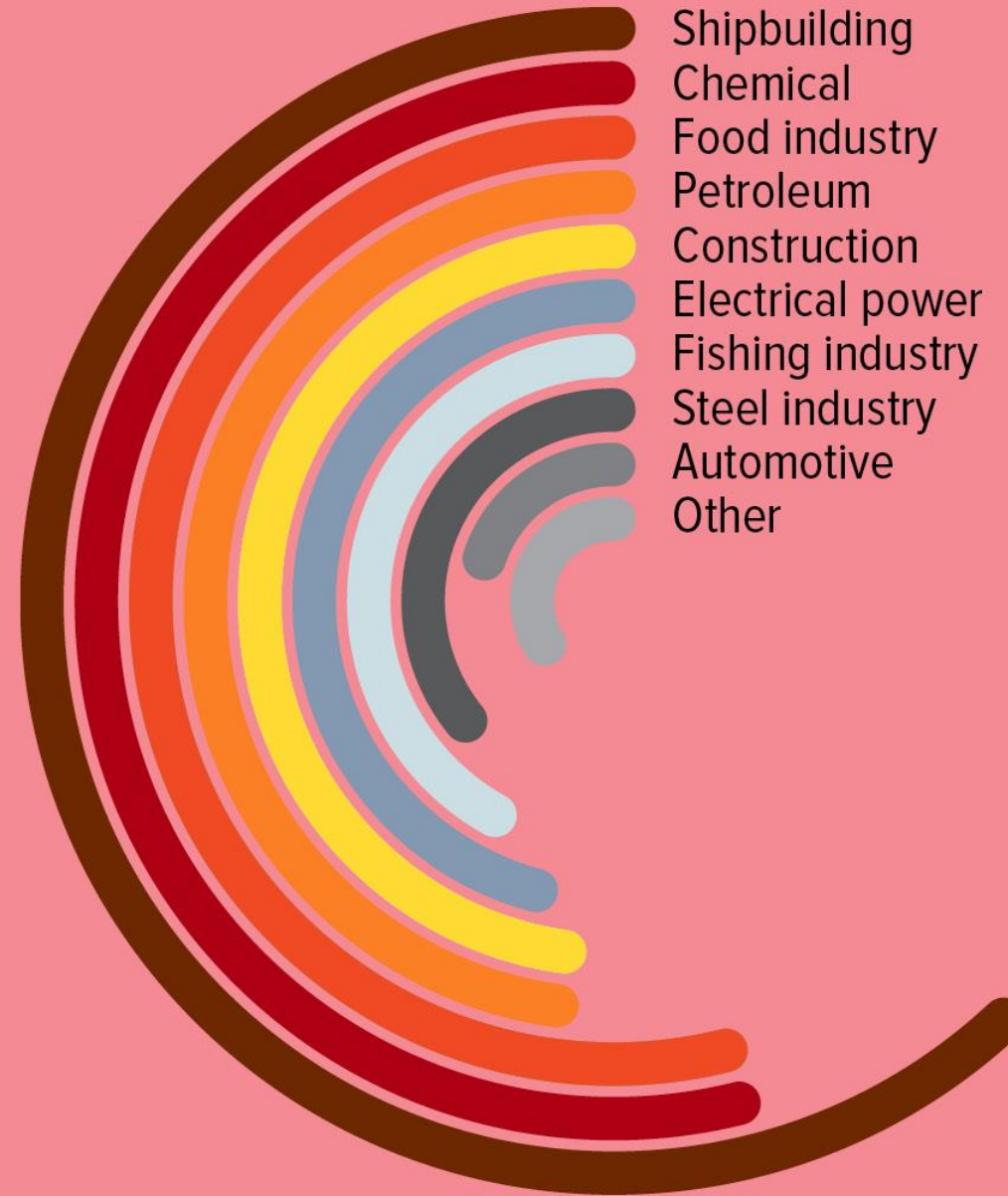


**MORE OFTEN
HOME OF
INDUSTRIAL
CLUSTERS**

MORE OFTEN HOME OF INDUSTRIAL CLUSTERS

Sectors of industry in the ports

- 62% Shipbuilding
- 54% Chemical
- 54% Food industry
- 48% Petroleum
- 48% Construction
- 46% Electrical power
- 42% Fishing industry
- 36% Steel industry
- 20% Automotive
- 34% Other



MORE OFTEN HOME OF INDUSTRIAL CLUSTERS

Role of port managing body for circular economy

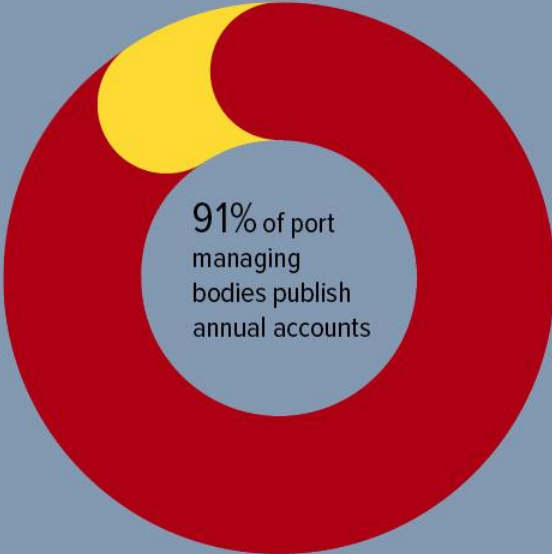
- 86% Facilitator
- 79% Provider of land
- 50% Initiator
- 29% Logistics support
- 18% Co-Investor

86% of port managing bodies active in circular economy initiatives act as facilitators



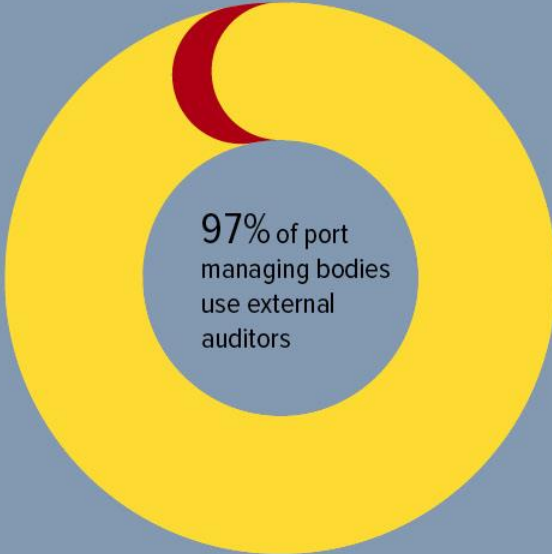
TRANSPARENCY AND ACCOUNTABILITY

TRANSPARENCY AND ACCOUNTABILITY



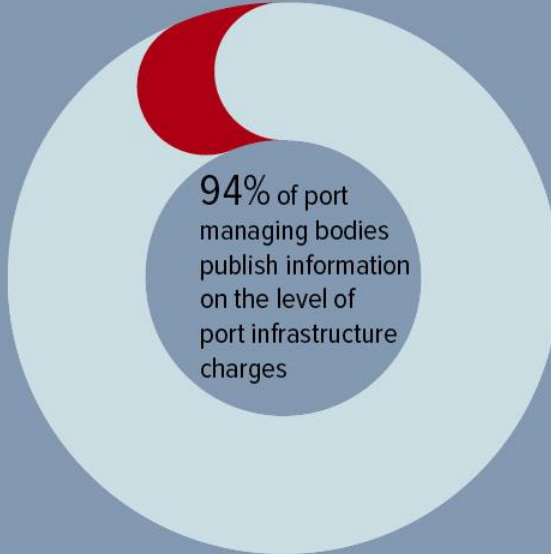
Public availability of annual accounts

- 91% Yes
- 9% No



Annual accounts are audited by an external auditor

- 97% Yes
- 3% No



Public availability of the port infrastructure charges

- 94% Yes
- 6% No

Thank you for your attention

PortinSights