

# Annual Report 2020 – 2021

*European Sea Ports  
Organisation*



# Table of contents

## Introduction – 3

- About ESPO
- Foreword by Annaleena Mäkilä, Chair

## ESPO Committees and Networks – 5

- Port Governance and Management
- Intermodal, Logistics and Industry
- Trade Facilitation, Customs and Security
- Marine Affairs
- Sustainable Development
- Cruise and Ferry
- Labour and Operations
- Economic Analysis and Statistics
- Blue Growth
- Energy

## Year in Review – 21

- ESPO Conference
- ESPO Award
- ESPO events organised, co-organised or supported
- Port Pro of the Month
- Year in pictures

## How ESPO works – 31

- ESPO's structure
- Members
- Secretariat

## Trends in ESPO – 34

## Facts and Figures (PortinSights) – 35

## Colophon – 38

# 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, 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*

This annual report comes out at the moment when ESPO members, EU policy makers and friends of ESPO have started seeing each other again after almost two years of digital meetings. It goes without saying that the corona pandemic has been extremely challenging for an organisation like ESPO, which works by definition cross-border, which relies on exchanges between port professionals and with policy makers, and which thrives on personal contacts. But we have also learned from this. Colleagues and members from all sides of Europe can “meet” virtually without travelling, and this is a tool we will probably keep using now and then.

Allow me to say, ESPO has succeeded very well in keeping all members actively engaged during this difficult period. Weekly morning coffees, albeit online, helped us not only to better understand what is going on in Brussels, but also allowed members to stay in touch. I would like to thank the secretariat for their efforts in keeping the network going and for all the work that has been delivered over the last year. This annual report shows very well the wide scope of initiatives ESPO has been working on. But I would also like to thank members who continued to contribute to position papers, discussions, studies and shared their data on PortinSights.

The past working year has been very busy at the EU political level. The Green Deal and the Fit For 55-package, the EU’s recovery plan and the review of Europe’s TEN-T policy are one by one very important topics that required our full attention. They will also be the focus of our work during the next year. Over the last twelve months, ESPO has also stepped up its work on Europe’s energy policy. Europe’s ports will play a crucial role in the production, supply, import and export of new clean energies for the economy and society. Different ports will take up different roles in that respect. This will imply adapting infrastructure, skills, connectivity and could even impact on the governance of certain ports. It is important that the role of ports in the new energy economy is recognised by policy makers.

The rapidly changing world and the huge challenges ahead require innovative solutions, collaboration, cross-sector engagement and future-proof and coherent legislation more than ever before. We hope that ESPO can continue to play a crucial role in creating coalitions of the willing to contribute towards sustainable growth in Europe. We also look forward to sharing our experiences and proposals with the Commission, Parliament and Council to achieve a coherent and fit-for-purpose legislative framework that delivers the Green Deal ambitions, which are fully shared by ESPO.

# 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 2020 until mid-October 2021.

## Port Governance and Management

*Chaired by Bernhard Zampolin (DE)*

## Intermodal, Logistics and Industry

*Chaired by Cédric Virciglio (FR)*

## Sustainable Development Committee

*Chaired by Heidi Neilson (NO)*

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

## Trade Facilitation, Customs and Security, and Marine Affairs Committees

*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 Rossum (NL)*

## Legal Advisory

*Chaired by Mārtiņš Ziemānis (LV)*

# Port Governance and Management

## EU taxonomy for sustainable activities

The EU taxonomy is a classification system establishing a list of environmentally sustainable economic activities. For each sector, including transport, the European Commission is setting up technical screening criteria of such sustainable activities. While the EU taxonomy was designed to predominantly guide private investments, it is also more and more used for public funding considerations. ESPO reacted on 18 December 2020 to the draft delegated act (Final act adopted on 21 April 2021) stressing that the criteria need to be fit-for-purpose and underlined the continued importance of basic port infrastructure, for example in promoting a modal shift to short-sea shipping. On 3 August 2021, the [Platform on Sustainable Finance](#) published a draft report with recommendations for technical screening criteria for the taxonomy's four non-climate objectives, but transport infrastructure has not yet been included in the draft.

## ESPO-Deloitte study on the changing role of ports

Together with Deloitte, ESPO developed a study called "[Europe's ports at the crossroads of transitions](#)" to make an analysis of the main drivers and trends impacting Europe's ports, in order to define the changing role of port managing bodies in Europe. More than 50 ESPO members participated in workshops and talks to identify drivers and trends which are changing the 'portscape'. The study was presented at the ESPO Conference Regatta 2021.

## Launch of Port Governance Fact Finding

Every five years, ESPO conducts a fact-finding survey to assess if and how port governance models have been changing in European ports. After the publication of "[Trends in Port Governance 2016](#)", ESPO has launched the next survey in October 2021. For the first time, the questionnaire will be carried out through ESPO's digital data platform [PortinSights](#) and contains new sections in the fields of circular economy and the strategic role of ports.

## Other topics

Together with the updated EU Industrial Strategy, on 5 May 2021 the European Commission published a **proposal for a Regulation on foreign subsidies distorting the internal market**. The Port Governance and Management Committee discussed the proposal and its relevance for European ports. The proposal aims to close the regulatory gap in the Single Market, whereby subsidies granted by non-EU governments currently go largely unchecked. ESPO is following the legislative process in the European Parliament and Council. In addition, ESPO followed and informed members about the steps of the **state aid modernisation**, especially in the field of energy, as well as the implementation report of the **Concessions Directive**. The Committee followed up on the establishment of **freeports** in the UK and discussed the possible implications for EU ports. Furthermore, members discussed the impacts on ports of the disruptions in the maritime supply chain.



## POSITION PAPER

• 10 JUNE 2021

Joint Deloitte-ESPO study:  
Europe's ports at the crossroads  
of transition

# Intermodal, Logistics and Industry

## Connecting Europe Facility 2021–2027 (CEF II)

Following the adoption of the Connecting Europe Facility II Regulation in July 2021, the implementation of CEF II has been high on the agenda of the Intermodal, Logistics and Industry Committee. ESPO actively accompanied the process of drawing up the call schedules and port-relevant priorities in the CEF II Work Programme 2021–2023. Following the publication of the 2021 CEF II Transport Call, ESPO organised info sessions to highlight the port-relevant topics and assist members to participate with well-developed project proposals.

## Revision of the TEN-T network

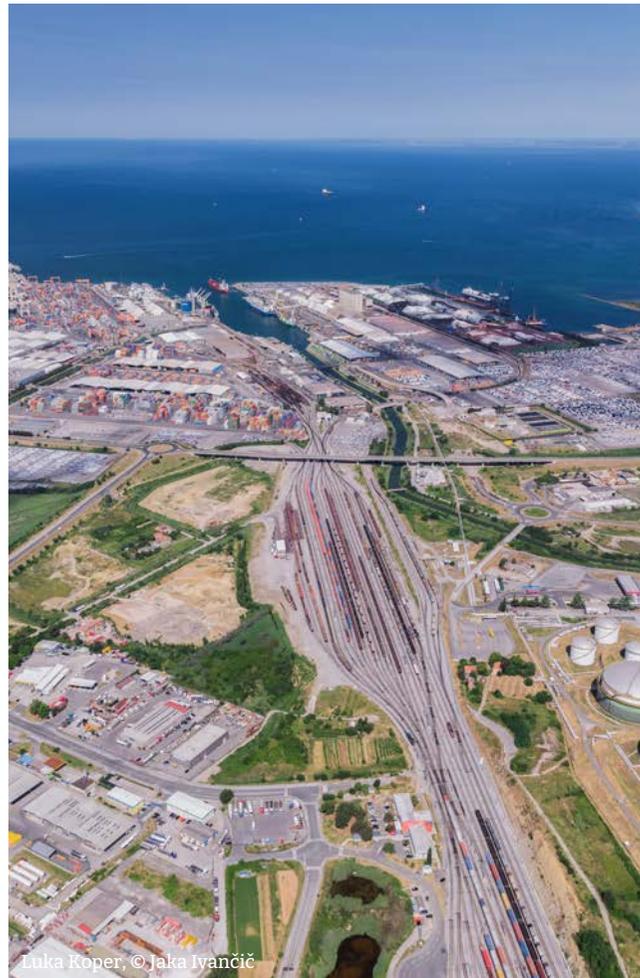
Ahead of the Commission's proposal for the revision of the TEN-T Network, ESPO adopted a position paper on the priorities of European ports for a revised TEN-T Network. The main objectives listed in ESPO's position are to strengthen the maritime dimension and to achieve a better recognition of the essential role of ports as multimodal and strategic nodes in the Network. ESPO was closely involved in the discussions on how to modernise the Motorways of the Sea (MoS) pillar with MoS Coordinator Prof. Kurt Bodewig. The Commission's legislative proposal is expected in Q4 2021 and ESPO will continue to work with the European institutions in 2022 to ensure that European ports' priorities are reflected in the revised TEN-T framework.

## Seaport-rail connection

2021 marked the Commission's European Year of Rail, culminating in the journey of the "Connecting Europe Express" across Europe. On 4 October 2021, ESPO highlighted in a [joint statement](#) with the European rail infrastructure managers and European rail freight association the importance of rail freight, the high potential of better seaport-rail connections and the need for a level playing-field for all rail governance models in European seaports. Earlier in 2021, ESPO rail experts had given [input to the European Railway Agency's report on rail freight](#), focusing on the important role seaports play for rail freight. ESPO is also a member of the European Rail Facilities Portal and participated in the Working Group on the TAF-TSI revision.

## Other topics

A horizontal topic of 2021 was the recovery from the COVID-19 pandemic, to which end the Commission had set up the [Recovery and Resilience Facility](#) with a total budget of EUR 723.8 billion. Member States had to submit national recovery plans of investments and reforms to access their share of the budget. Jointly with more than 30 organisations, on 10 February 2021 ESPO initiated a transport sector initiative to call on Member States and the European Commission to ensure that the transport sector receives adequate consideration in the National Recovery and Resilience Plans. ESPO also closely monitored the establishment of the [Brexit Adjustment Reserve \(BAR\)](#), with a budget of EUR 5 billion, to ensure that ports which have been negatively affected by the withdrawal from the Union are eligible to benefit from the fund. All Member States receive a share of the BAR following an allocation method reflecting the impact of Brexit on the respective Member State and the BAR is also implemented by the Member States. In addition, ESPO was closely following the European Parliament's own-initiative report "[Towards Future-proof Inland Waterway Transport \(IWT\) in Europe](#)", ensuring that the role of seaports was well reflected in the final report.



## POSITION PAPERS

- **10 FEBRUARY 2021**  
[Recovery and Resilience Facility | Transport keeps us going forward](#)
- **30 APRIL 2021**  
[Position of the European Sea Ports Organisation in contribution to the Public Consultation accompanying the Impact Assessment for the revision of the TEN-T Regulation \(EU\)1315/2013](#)
- **27 SEPTEMBER 2021**  
[Contribution of the European Sea Ports Organisation to the online public consultation on an EU Contingency plan for transport](#)

# Trade Facilitation, Customs and Security

## Brexit and its impact on the European port sector

Brexit has continued to feature this year as one of the major items on ESPO's agenda. On 31 January 2020 the UK left the EU, marking the start of a transition period, where the UK remained part of the EU Single Market and Customs Union until 1 January 2021. This transition period allowed the EU and the UK to negotiate a Trade and Cooperation Agreement. During these negotiations, ESPO has ensured that the Commission was aware of the challenges and priorities for European ports. As from 1 January 2021, ESPO has focused on the implementation of the EU-UK Trade and Cooperation Agreement and the consequences of the UK's full withdrawal from the EU on ports and shipping. ESPO is part of the EU Domestic Advisory Group of the EU-UK Trade Cooperation Agreement (transport subgroup), which provides for

the involvement of civil society in the implementation of the Agreement. The Trade Facilitation, Customs and Security Committee also monitored and discussed the establishment of freeports in the UK and its implications for EU ports.

## European trade policy

The Trade Facilitation, Customs and Security sub-Committee also engaged with new initiatives in the field of EU trade policy. The Committee analysed and discussed the EU's new trade strategy, which was set out with a Communication "Trade Policy Review – An open, sustainable and assertive trade policy". Furthermore, ESPO also monitored relevant legislative developments regarding the proposal for a regulation establishing the European Union Single Window Environment for Customs. In this context, ESPO published a position on the proposal on 15 December 2020,

asking to provide more clarity on the relationship between the Maritime and Customs Single Window environments. Finally, ESPO this year also started the work regarding the proposal for a regulation establishing a Carbon Border Adjustment Mechanism, which was published on 14 July 2021, and 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. ESPO will follow the further legislative process and assess if certain concerns have to be addressed.

## Cybersecurity

ESPO contributed last year to the development of a Cybersecurity toolkit for transport, developed by the Commission. Furthermore, ESPO also followed up closely all relevant legislative developments with regards to

the Commission's proposal for a Directive on measures for high common level of cybersecurity across the Union (NIS 2.0), which was published on 16 December 2020 and identified ports as essential entities, setting obligations for port managing bodies, their port facilities and entities operating works and equipment in the port. On 10 March 2021, ESPO issued a position on the NIS 2.0 proposal, asking mainly that the scope of the NIS 2.0 Directive should be limited to those ports that need high levels of protection, while at the same time drawing attention to the protection of the entire port ecosystem as well as the broader transport and logistics chain.

## Other topics

The Trade Facilitation, Customs and Security sub-Committee also followed this year the European Parliament's work on an own-initiative report on a [European Strategy for critical raw materials](#). In this context, ESPO published a position on 28 June 2021. ESPO also followed up closely relevant policy developments leading up to the publication of the Commission's [new Arctic strategy](#) on 13 October 2021 with a Communication called: "A stronger EU engagement for a peaceful, sustainable and prosperous Arctic". The Trade Facilitation, Customs and Security sub-Committee also followed relevant legislative developments regarding the proposal for a Directive on the [resilience of critical entities](#), which was published on 16 December 2020 and designates managing bodies of ports, including their port facilities and entities operating works and equipment contained within ports as critical entities requiring them to take appropriate measures. Finally, ESPO also contributed to the development of a [Contingency plan for transport](#), which aims to provide guidance for European freight and passenger transport in times of crisis, by drawing on lessons learnt from the COVID-19 pandemic. In this context, ESPO published a position on 27 September 2021.



Port of Zeebrugge, © Mike Louagie

## POSITION PAPERS

### • 28 JUNE 2021

[Position of the European Sea Ports Organisation on the draft report of the Committee on Industry, Research and Energy \(ITRE\) on a European Strategy for critical raw materials \(2021/2011\(INI\)\)](#)

### • 10 MARCH 2021

[Position of the European Sea Ports Organisation on the proposal for a Directive on measures for high common level of cybersecurity across the Union \(COM \(2020\)0359\)](#)

### • 15 DECEMBER 2020

[Contribution of the European Sea Ports Organisation to the public consultation on the proposal for a regulation establishing the EU Single Window Environment for Customs](#)

### • 27 SEPTEMBER 2021

[Contribution of the European Sea Ports Organisation to the online public consultation on an EU Contingency plan for transport](#)

# Marine Affairs



© Ports of Szczecin and Świnoujście

This year the Marine Affairs Committee continued to monitor the implementation of the regulation establishing a [European Maritime Single Window environment](#). In short, the EMSWe regulation aims to establish harmonised rules for the provision of the required information by shipowners or their representatives at port calls, by ensuring that the same data sets can be reported to each maritime National Single Window in the same way. ESPO also contributed to the implementation of the EMSWe regulation through expert groups set up by the Commission.

Furthermore, ESPO looked into the developments this year with regard to the [revision process of the Port State Control Directive](#). The PSC Directive establishes a system of inspection of foreign flagged ships in the EU for the purpose of verifying that the competency of the crew on board and the condition of the ship and its equipment comply with the requirements of international conventions on the safety of life at sea and on the protection of marine environment. In the context of its revision process, ESPO contributed to the impact assessment study carried out by consultants from COWI and Grimald Studio Legale. ESPO will continue to follow up all relevant developments leading up to a possible revised PSC Directive in the coming year.

The Marine Affairs Committee also closely followed this year relevant developments regarding [cybersecurity](#) and the proposal for a [NIS 2.0 Directive](#) (see Trade Facilitation, Customs and Security Committee). Furthermore, ESPO monitored the revision process of the Regulation establishing a [European Maritime Safety Agency](#), which aims to both expand and update EMSA's mandate. The Marine Affairs Committee also followed up relevant developments regarding the establishment of non-mandatory ["EU Operational Guidelines on trials of Maritime Autonomous Surface Ships \(MASS\)"](#). Finally, The Committee also monitored relevant developments with regards to the implementation of the [Port Reception Facilities Directive](#) and followed the developments in the Safe Sea Net Group Meeting of experts organised by EMSA.

# Sustainable Development

## The European Green Deal and the Fit for 55-package

This year, the work of the Committee has been focused on the European Green Deal and the implications of the extension of EU climate policy to the maritime sector through the publication of the Fit for 55-package in July 2021. The Committee has been convened several times in the last year to develop positions on the various legislative proposals put forward by the European Commission, especially those relating to the provision and use of alternative fuels infrastructure in European ports, energy taxation, and emissions-trading.

Through the concerted efforts of Committee members and the secretariat, ESPO has advocated for a goal-based and technology-neutral approach to alternative fuels infrastructure and called for adequate public funding to be made available to

the maritime sector and ports. ESPO has urged policymakers to ensure that the entire Fit for 55-package and the individual proposals work together, in order to ensure the coherence of the proposed legal framework. Furthermore, ESPO has drawn attention to the fact that the regional scope of the package runs the risk of creating negative competitiveness effects on ports as ports and markets outside the EU do not need to abide by the proposed climate policies. As negotiations between EU institutions on the Fit for 55-package gather pace, ESPO is well-positioned to provide technical and political input on key issues, and will continue to forcefully promote the interests of European ports.

## Publication of the ESPO Green Guide 2021

Starting in late 2020, ESPO has been working on a new version of the ESPO Green Guide, together with a number of

members in a dedicated expert group. In September of this year, the ESPO Green Guide 2021 was published. The 2021 Guide provides Europe's ports with tools and concrete guidance for greening, and comes as a response to the main environmental challenges currently facing the port sector, with climate change being by far the most urgent. The Guide is a bottom-up initiative from the port sector that provides a vision for ports in a green future, and steps up the ambition of ports in response to raised climate and environmental targets on the European level. It includes a template for individual port roadmaps, and a checklist of greening tools available to port managing bodies. The new Guide also includes a comprehensive and updated overview of port-relevant EU and international legislation. For the first time, the Green Guide is accompanied by a new and continuously updated digital database of good green practices from European ports. Over 70 good practices are already available at [www.espo.be/practices](http://www.espo.be/practices).

## POSITION PAPERS

- ESPO position on the proposals for Alternative Fuels Infrastructure Regulation and FuelEU Maritime Regulation

- **24 MARCH 2021**

[Towards an intelligent legislative framework for OPS](#)

- **NOVEMBER 2020**

[ESPO Criteria for a Market-Based Measure \(EU ETS\)](#)

- **7 SEPTEMBER 2020**

[Position of the European Sea Ports Organisation on the FuelEU Maritime](#)

- Energy Taxation Directive

- Renewable Energy Taxation Directive



## 2020 Environmental report

In October last year, ESPO presented the [2020 Environmental Report](#), which had air quality, climate change, and energy efficiency as the top three environmental priorities for ports. Since then, the EcoPorts Network has been growing and now consists of 122 members in 26 countries, with 29 PERS-certified ports. The environmental monitoring and certification provided by the EcoPorts Network was integrated as a key tool in the [ESPO Green Guide 2021](#) published in September 2021.

In October 2021, the [ESPO Environmental Report 2021](#) was presented at the GreenPort Congress hosted by Piraeus Port Authority. For 2021, the report shows a number of positive trends amongst key indicators. Based on the slightly larger sample compared to 2020, the five top environmental priorities are the same as in 2020, with air quality, climate change, and energy efficiency as the top three priorities.

The 2021 Report finds that ports are demonstrably improving their environmental management, addressing their priorities through

bottom-up initiatives. In 2021, a growing number of ports provided environmental training programmes and training, and close to 40% of ports are certified with EcoPorts PERS. In 2022, ESPO will start looking at updating the questions in the Self-Diagnosis Method (SDM) checklist.

## Top 10 environmental priorities of the port sector in 2021

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

# Cruise and Ferry

## POSITION PAPERS

### • 24 MARCH 2021

[Towards an intelligent legislative framework for OPS](#)

### • 29 JULY 2020

[ESPO welcomes EMSA and ECDC COVID-19 Guidance for safe and sustainable restoration of cruise operations](#)

Since last year, ESPO has continued monitoring the impact of COVID-19 on cruise and ferry ports. Figures from ESPO's PortinSights show that in the second quarter of 2021, the total number of passengers in European ports remains far lower than before COVID-19. According to academic studies, the decline in passenger ship calls was the lowest in the third quarter of 2020. To enable the restoration of passenger traffic, ESPO has contributed to operational guidance for cruise, monitored the development of the EU Digital COVID Certificate, and advocated for supporting ports as part of a sustainable and smart recovery.

Since 2020, ESPO has been closely involved in the implementation of EU legislation for checks of third-country nationals entering the EU. ESPO has called for this legislation to be practicable, fit for purpose, and not overly burdensome in terms of the administrative processes related to checks of passengers arriving in ports in the EU. A priority for European ports has

been to find practical ways to check passengers travelling in vehicles as well as lorry drivers, and to ensure that any additional infrastructure needed to carry out checks in port areas should be limited and supported by public funds. ESPO has worked with the European Commission on the implementation of the Entry-Exit System (EES) and the European Travel Information and Authorisation System (ETIAS). In 2022, ESPO will also follow the revision of the Advanced Passenger Information Directive.

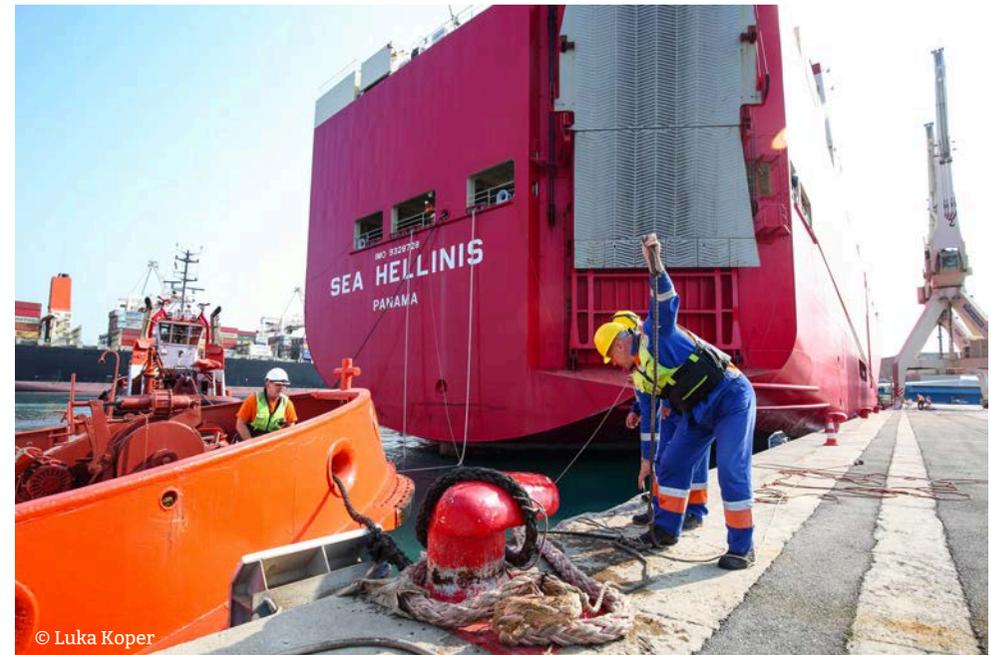
ESPO has been addressing sustainable cruise in various contexts. The Fit for 55-package contains provisions that are directly relevant to cruise and ferry ports, including requirements for the deployment and use of alternative fuels infrastructure such as onshore power supply (OPS) and liquefied natural gas (LNG). The Cruise and Ferry Port Network has thus been closely involved in preparing ESPO's positions on these issues.

The ESPO secretariat has also joined a Peer Review Group set up by the European Commission to help draft a Sustainable Cruise Charter, which will be adopted at the next pan-European Cruise dialogue in 2022. In parallel, the ESPO secretariat has joined a Nordic Council working group for sustainable cruise in the Baltic.

# Labour and Operations

In a joint decision, all four Social Partners (ESPO, FEPORT, ETF, IDC) agreed to **pause the official meetings of the Sectoral Social Dialogue Committee (SSDC)** for ports. End of October 2020, in a letter sent to Commissioners Schmidt, Vălean and Vestager, the Social Partners expressed their disappointment and frustration with respect to the lack of support and responsiveness from the Commission on several key topics for the port sector. The Social Partners called for a more meaningful dialogue with the Commission. After several exchanges, the Social Partners agreed to resume the official meetings in November 2021. Throughout the year ESPO, FEPORT, ETF and IDC continued working bilaterally on the issue of safety on board of ships.

Despite officially being put on hold, the Social Partners continued their work on **safety on board of ships** by setting up a working group on the issue. After having identified a lack of proper enforcement and implementation of the Directive on the safe loading and unloading of bulk carriers, as well as a legal gap for the protection of port workers, the Social Partners decided to develop bottom-up safety checklists. The working group will present its progress report in November 2021 and the work will continue in 2022.



© Luka Koper

## POSITION PAPER

• 10 FEBRUARY 2021

Joint statement about the Social Dialogue for Ports

# Economic Analysis and Statistics

ESPO continued to develop its [data platform PortinSights](#). More than 90 ports are regularly contributing their quarterly throughput data, accounting together for 72% of European maritime throughput. The Committee has been instrumental in analysing the impact of COVID-19 on the ports' throughput, as well as the first signs of recovery from the crisis. The analysis of quarterly comparison between 2019 and 2020 showed that Q4 already demonstrated a clear upward trend, which was continued in Q1 of 2021. ESPO is in the process 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 Q4 2022 on the ESPO website.

In 2021, the Economic Analysis and Statistics Committee explored areas to expand port performance measurement beyond port throughput. As “added-value” gains more and more importance and other factors beyond mere throughput volume are increasingly considered, the Committee decided to start the development of [performance indicators](#), bridging the sectors of transport and industry. ESPO had already developed a template 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.

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 Committee to present recent developments in maritime statistics and continue the annual comparison between ESPO's throughput data and the Eurostat data (2019 data). The joint exercise will be continuously repeated in order to optimise both parties' data quality.

# Blue Growth

The Blue Growth Network, together with the Energy Network, actively looked into all relevant EU policy developments regarding **offshore renewable energy**. In this context, ESPO monitored the developments leading up to the publication of the Commission's new Offshore Renewable Energy Strategy on 19 November 2020, which ultimately aims for the installation of 300 GW of offshore wind and 40 GW of ocean energy by 2050. In order to ensure that the ports' point of view was taken into account during the development of the EU's new Offshore Renewable Energy Strategy, ESPO published a position explaining the ports' role as well as their policy priorities for offshore renewable energy. ESPO also followed this year all relevant legislative developments regarding the European Parliaments' work on an own-initiative report on a European Strategy for Offshore Renewable Energy.

The Blue Growth Network also monitored all relevant policy developments leading up to the publication on 18 May 2021 of the Commission's new sustainable blue economy strategy. With this strategy, the Commission sets out an agenda for **the blue economy** to help achieve the European Green Deal's objectives. ESPO contributed to the development of the EU's new sustainable blue economy strategy by publishing a position on 7 December 2020, drawing attention to the important and diverse roles of ports in the European blue economy.

ESPO furthermore participated on 28 June 2021 in the first meeting of the **European Ports Forum's sub-group on Ports as Hubs for a Sustainable Blue Economy**. 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.

## POSITION PAPERS

### • 25 SEPTEMBER 2020

[Contribution by the European Sea Ports Organisation to the public consultation on an EU Strategy for Offshore Renewable Energy](#)

### • 4 DECEMBER 2020

[Contribution from the European Sea Ports Organisation \(ESPO\) to the Commission's roadmap on a new approach for a sustainable blue economy in the European Union](#)

# Energy

## POSITION PAPERS

### • 3 DECEMBER 2020

[TEN-E review must recognise seaports as key players in the energy sector](#)

### • 4 MARCH 2021

[ESPO position paper on the TEN-E review proposal](#)

One of the main topics discussed in the Energy Network during the last working year was the Commission's proposal for a revised regulation establishing [guidelines for Trans-European Energy infrastructure \(TEN-E\)](#), which was published on 15 December 2021. Ever since ESPO has been closely following all relevant developments in the European Parliament and Council. In this context, ESPO published a position on the proposal on 4 March 2021. The position points out the importance of investing in new hydrogen infrastructure, the crucial role of import facilities and of ports in the offshore renewable energy sector, the need to simplify administrative and funding processes, and the need to have synergies between TEN-E and TEN-T.

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. In this context, ESPO monitored the work in the European Parliament on an own-initiative report on the European Strategy for Hydrogen. The report was adopted in plenary on 19 May 2021, and reflected well ESPO's main priority to consider ports as strategic hubs for the import, production, storage, supply and utilisation of clean hydrogen and the need for space and investments in new port infrastructure. ESPO also became part of the [Global Ports Coalition on Hydrogen](#) this year, and has been following the work of the [Fuel Cells and Hydrogen Joint Undertaking](#) (FCH JU).

ESPO also followed relevant legislative developments regarding the Commission's Communication on an [EU Strategy for Energy System Integration](#), published on 8 July 2020. The Communication highlights the energy needs of the transport sector and puts forward a strategy for the energy sector to ensure the transport sector can decarbonise. The Energy Network also monitored the work in the European Parliament regarding an own-initiative report on a European strategy for energy system integration, which was adopted on 19 May 2021.

Finally, the Energy Network, together with the Blue Growth Network, followed all relevant EU policy developments regarding [offshore renewable energy](#) (see part on Blue Growth Network).

# Year in Review



# ESPO Award 2020

*Enhancing the port-city relationship by encouraging innovators and local start-ups to be part of the port ecosystem*



Out of seven submissions and four shortlisted projects, [Algeciras Port Authority was the winner of the 12th edition of the ESPO Award](#), in recognition of its successful strategy to attract innovation and local start-ups. Ms Adina Vălean, EU Commissioner for Transport, announced the ESPO Award Winner during a dedicated ESPO Award Digital Ceremony on 10 November 2020. The Port's project, "The Journey of Innovation – Travesía de la Innovación", showed that Algeciras is on a transformational pathway from the port authority being landlord, operator and regulator to becoming a business and efficiency partner. The Port has an open innovation portal, organises innovation days, seminars and innovation awards, and also has a port data lab and real working port challenges for start ups.

# ESPO Conference Regatta 2021

*25 – 28 May | Valencia, Ghent, Oslo*

The 17th edition of the annual ESPO Conference took the form of a hybrid Conference Regatta, crossing Europe from South to North around the theme, "Europe's ports at the crossroads of transitions", which centred around the future of ports as part of a strong, sustainable and resilient European economy and society.

The ESPO Conference Regatta 2021 set sail in the [Port of Valencia](#) on 25 May to discuss the economic outlook of European ports and the changing role of ports. Delegates were then welcomed by [North Sea Port](#) in Ghent on 26 May, where Europe's Recovery and Resilience policy, the review of the Trans-European Transport policy, the Green Deal and Europe's mobility strategy were the main topics of the day. The last port of call, the [Port of Oslo](#), was the finish line of the event on 28 May. The last day was all about greening and sustainability, and what ports are doing on their journey to becoming zero-emission areas.

The next ESPO Conference will take place in Valencia on 2-3 June 2022.

# Events organised, co-organised or supported

- ESPO Award 2020 Ceremony, 10 November 2020, Brussels/online
- ESPO-Deloitte Workshop on the Future Role of Ports, 8-12 February 2020, online
- ESPO Conference Regatta 2021, 25-28 May 2021, Valencia, Ghent, Oslo
- GreenPort Cruise & Congress, 20-22 October 2021, Piraeus

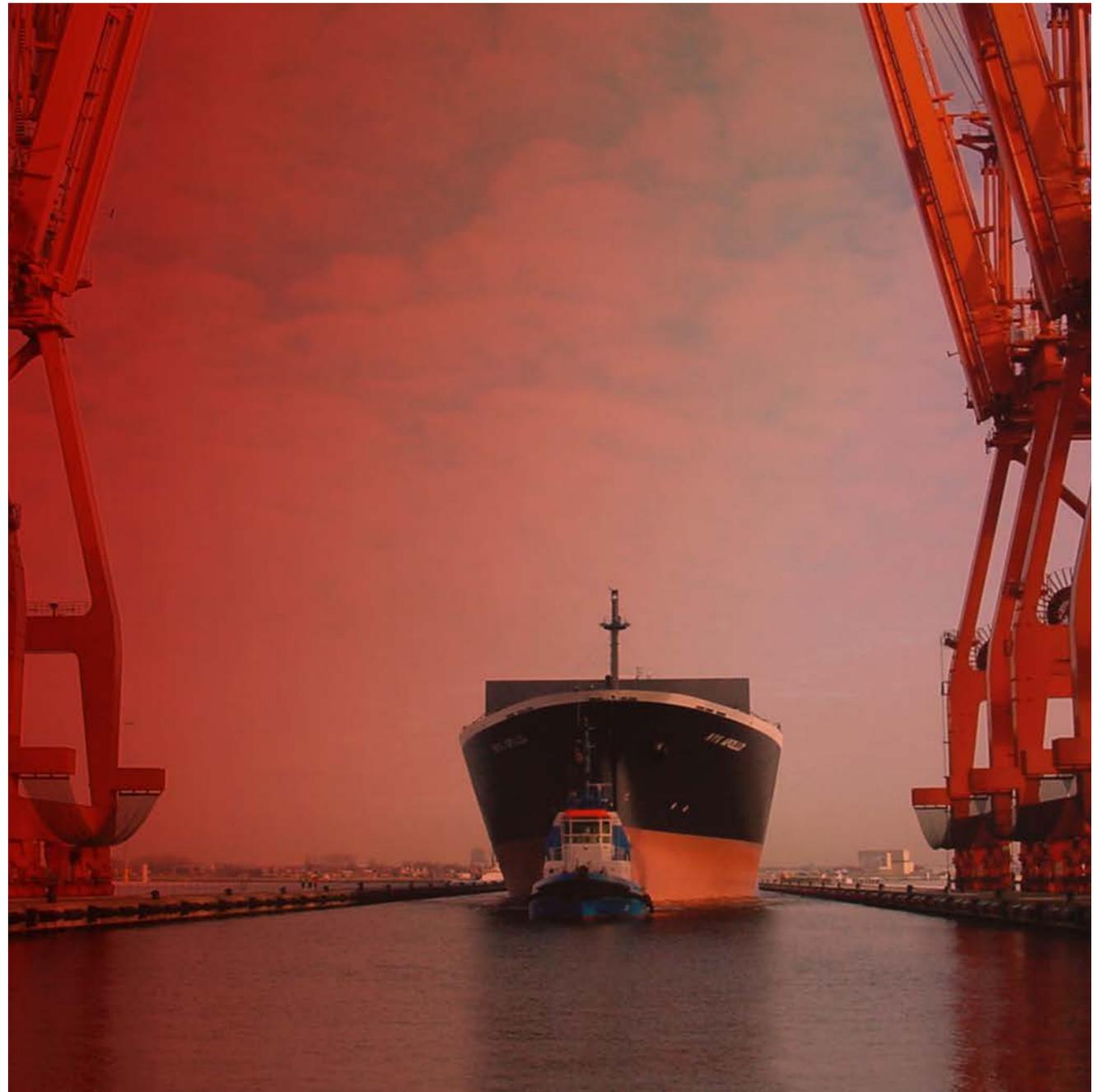
# Publications

- ESPO Award 2020 Booklet with Summary of Applications
- ESPO Environmental Report 2020
- Top 10 Environmental Priorities 2020
- Joint Deloitte-ESPO study: Europe's ports at the crossroads of transitions
- ESPO Green Guide 2021, a Manual for European Ports Towards a Green Future
- ESPO Environmental Report 2021

**Information on the above events and publications can be found on the ESPO website: [www.espo.be](http://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.*





**Holger Banik**  
*(Niedersachsen Ports,  
October 2021)*

*Managing several ports can only be accomplished together. That is why we bundle core competencies and learn from one another. It is our experience that we progress more quickly when we enter into cooperation agreements – in the ports and beyond the ports.*



**Victor Schoenmakers**  
*(Port of Rotterdam,  
November 2020)*

*I think it is of the utmost importance for the European port community for ESPO (ed.) to have a single and strong voice in the political debate in Europe and to operate as a unified organisation that also gives room to individual ports to underline their specificities and distinguish themselves in the debate.*



**Jean-Pierre Chalus**  
*(Port of Guadeloupe,  
December 2020)*

*Ports of the outermost regions need to finance the adaptation of their infrastructure as they have this particularity that they handle almost 95% of goods that are intended to local consumption. They are essential infrastructure not only for the import and export of goods but also for diversified economic activities, which generate significant benefits for all territories.*



**Tom Hautekiet**  
*(Port of Zeebrugge,  
January 2021)*

*Today we act as a facilitator for trade, but I believe we can play an even more active role in attracting new trade and business to Zeebrugge. Especially in the development of supply chains the port authority can be more involved. We can also invest more in anticipating future changes, giving us a lead in new situations.*



**Pino Musolino**  
*(Port System Authority of the  
Central Northern Tyrrhenian Sea,  
February 2021)*

*If we can build an “ecosystem” able to attract industries, or parts of them, willing to reshore, this should be done without hesitation. And ports are the ideal places where most of this reshoring could, and should, take place thanks to the availability of spaces, the need to diversify and convert areas, due for example to major changes in the energy and chemical sectors, and the ability to be at the same time logistic nodes and industrial clusters.*



**Marko Mykkänen**  
*(Port of Oulu, March 2021)*

*In general, digitalisation will be one of the major forces of change that will affect the whole port industry in the future. But it is not a threat. It is an opportunity to develop things, services, business models, awareness and above all, sustainability.*



**Glenn Carr**  
*(Rosslare Europort,  
April 2021)*

*I think in Ireland and across the world, the port, shipping and logistics industry has done an unbelievable job in keeping vital supply chains going throughout the pandemic.*



**Pirro Vengu**  
*(Port of Durrës, May 2021)*

*We value ESPO's voice in Brussels and count on the unparalleled expertise of its network of Ports to help us improve standards of operation, port governance and strengthen the Albanian maritime sector as a whole.*



**Jacoba Bolderheij**  
*(Port of Den Helder, June 2021)*

*All ports need to anticipate market developments and to invest to stay relevant and, as such, to be able to play a local, regional and national role in the often long-term ambitions on again various (local, regional and even national) levels.*



**Gerardo Landaluce**  
*(Port of Algeciras,  
July/August 2021)*

*Whoever controls the port transshipment activity will control the supply chain for import and export cargo. One of the key roles of EU ports is to guarantee a reliable supply chain of foreign trade in the EU economic interests.*

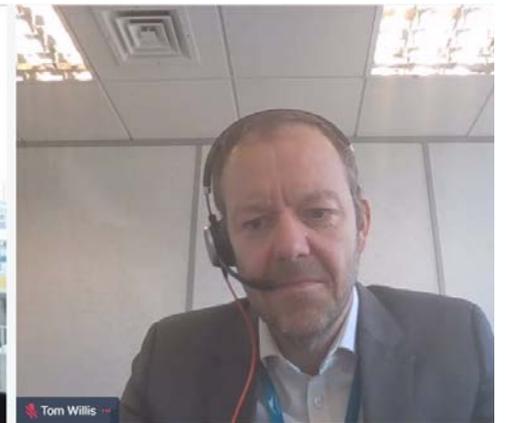
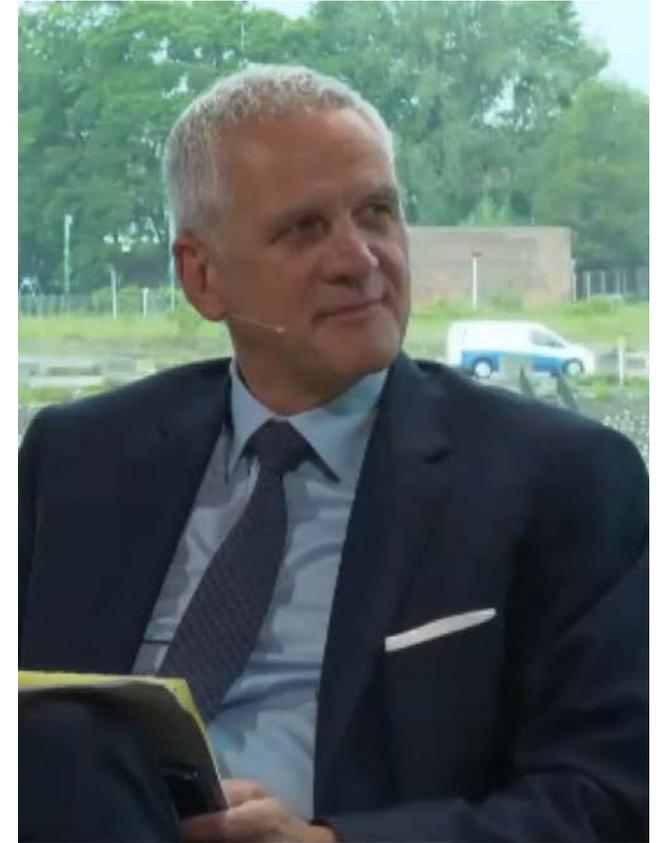


**Krzysztof Urbaś**  
*(Ports of Szczecin and  
Świnoujście, September 2021)*

*The development of the port and its competitiveness necessitates a broader approach. Thus, investment in access infrastructure, including the access from the hinterland, is crucial for the port*

# 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 is open to observer members from European countries adjacent to the EU. ESPO currently has observer members in Albania, Iceland, Israel, Ukraine and the United Kingdom.

The membership structure of ESPO is organised on a national level. This finds its reflection in the General Assembly of the organisation, where each EU member state, as well as Norway, 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](http://www.espo.be/membership-overview)

## ESPO welcomes the Port of Durrës as observer member

Durrës Port Authority has [joined ESPO as an observer member](#). Port of Durrës is Albania's port of call, accounting for nearly 90% of Albania's total international maritime freight traffic and more than 40% of Albania's total international freight traffic.

# ESPO Secretariat



**Isabelle Ryckbost**

Secretary General



**Anne-Rieke Stuhlmann**

Senior Policy Advisor Intermodal & Logistics, Social Dialogue, Statistics, Port Governance



**Valter Selén**

Senior Advisor Sustainable Development, Cruise and Ferry Network, EcoPorts Coordinator



**Turi Fiorito**

Senior Advisor



**Laurens Schautteet**

Senior Policy Advisor Trade Facilitation, Customs and Security, Marine Affairs, Blue Growth and Energy



**Anaëlle Boudry**

Policy Advisor Energy



**Cécile Overlau**

Finance and Office Manager



**Hélène Vancompernelle**

Personal Assistant, Events and Communication Manager



**Céline Lefort**

Administrative and Event Assistant

# Trends in ESPO

All technical committees together, women represent **35,10%** of the port professionals who attended ESPO meetings in 2020

In 2020, **490** port professionals participated to ESPO committee meetings

In the last year, ESPO published **13** positions papers

Since May 2020, ESPO organised **45** editions of the 'Morning Coffee' with its members, debriefing on relevant news happening in Brussels each week

The EcoPorts Network numbers **122** members in **26** countries, with **29** PERS-certified ports

Since 2009, **193** projects have been submitted for the ESPO Award on Social Integration of Ports

In the last year, ESPO published **55** press releases

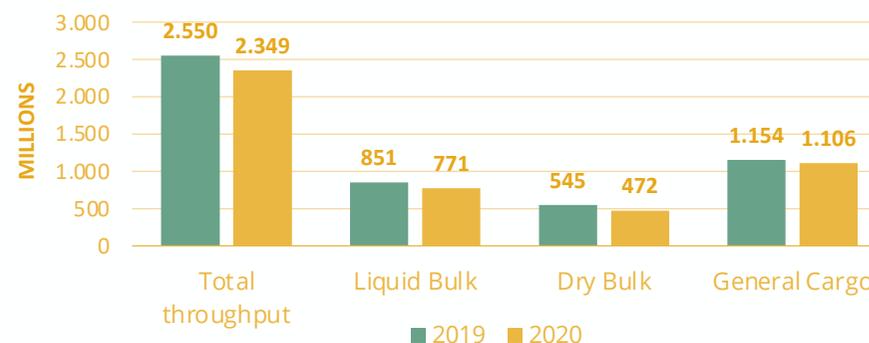
ESPO actively participated in around **70** events in the last year

# Facts and Figures PortinSights



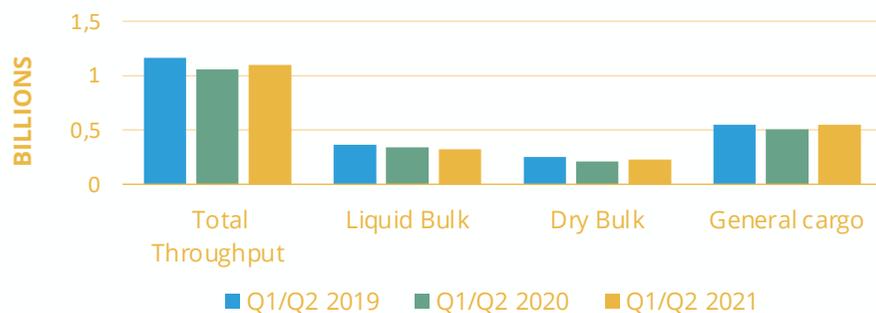
PortinSights is **ESPO's digital platform for European ports** to collect, share, compare and analyse their data. The digital platform includes throughput data, environmental data (EcoPorts) and governance data. In terms of throughput data, PortinSights currently represents over **70% of the total EU-27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

## European Ports (annual throughput)



Total throughput	-7,9%
Liquid bulk	-9,4%
Dry bulk	-13,3%
General cargo	-4,2%

## European ports (cumulative Q1 and Q2)



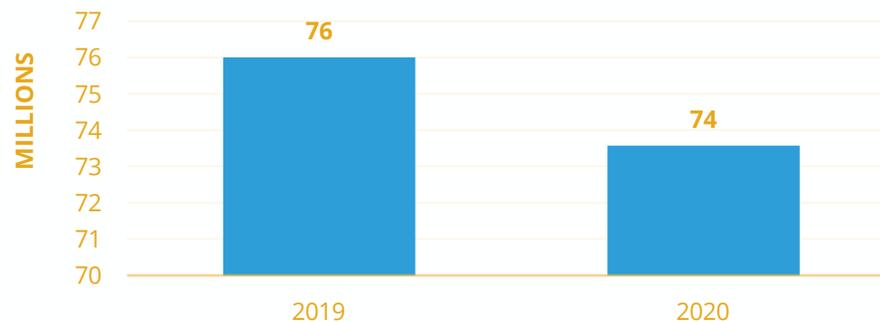
	2021 - 2019	2021 - 2020
Total throughput	-5,5%	-3,9%
Liquid bulk	-12,5%	-6,1%
Dry bulk	-7,7%	-9,0%
General cargo	+0,0%	-8,1%

## European ports: passengers (cumulative Q1 and Q2)



	2021 - 2019	2021 - 2020
Passengers	-57,2%	-13,5%

### European ports: annual container (TEU)



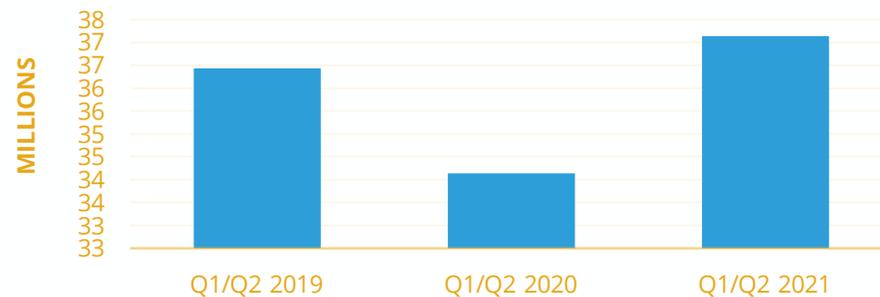
Container TEU	-3,2%
---------------	-------

### European ports: container (TEU) quarterly



	2021 - 2019	2021 - 2020
Q1	+2,7%	+4,4%
Q2	+1,0%	+13,3%
Q3	-	-
Q4	-	-

### European ports: container (TEU) cumulative Q1 and Q2



	2021 - 2019	2021 - 2020
Container TEU	+1,9%	+8,8%

All rights reserved. No part of this publication may be reproduced, stored in an automated file or published in any form or by any means, either electronically, mechanically, through photocopying, recording or otherwise, without the prior written consent of the publishers.

The text in the publication is © 2021 by the European Sea Ports Organisation.

**Editing** Isabelle Ryckbost, Laurens Schautteet, Céline Lefort

**Design** Catapult ([www.catapult.be](http://www.catapult.be))



[WWW.ESPO.BE](http://WWW.ESPO.BE)