

TRENDS IN EU PORTS' GOVERNANCE 2022



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ACKNOWLEDGEMENTS

All port managing bodies that filled in the survey and provided the data for this report. The ESPO Committee on Port Governance and Management for the support and feedback in drafting the survey and the report. The publication was edited by Anne-Rieke Stuhlmann and Céline Lefort of the ESPO secretariat.

GRAPHIC DESIGN

Catapult (www.catapult.be)

FOREWORD

The tradition of ESPO to report about the governance of its ports goes back to the 1970s, when the first Fact Finding report was published. What started as a more academic exercise has now become a report which shows that despite diverging governance models among European ports, they do share a common culture.

This edition clearly demonstrates how Europe's seaports nowadays cover a wider scope of activities and responsibilities than before. While there has been a clear move towards corporatisation for many years, the strategic and—to some extent—public role of port managing bodies has not diminished. On the contrary, the strategic role of ports has come to the forefront more than ever. First, during the pandemic when Europe's ports have proven to be essential to ensure the supply of goods and material necessary to keep society and the economy going. Lately, with the Russian invasion of Ukraine, ports have been identified as crucial stakeholders in guaranteeing the resilience and security of energy supply in the short run and as enablers of phasing out our dependence on fossil energies in the longer run.

The challenges Europe's seaports are facing nowadays, as well as their ambitions, often go beyond the capacity of a single port or economic player. The current report on 'Trends in EU ports' governance' shows that more and more ports are looking to cooperate, either with other ports, or with other stakeholders in the port ecosystem and beyond. The degree of cooperation varies from coalitions of the willing on a specific issue to full mergers.

The current challenging environment and rapidly changing context make it increasingly difficult for ports to plan years ahead. We see that port masterplans have a shorter duration than before and cannot be made without involving all players in the ecosystem.

Finally, this report shows the importance Europe's ports attach to transparency. Both financial and sustainability reporting have become essentially their licence to operate. Transparency is equally important towards users and their local community and has been integrated as a normal part of their social corporate governance.

I would like to thank all members who contributed to this report by sharing their data to answer the survey and I would like to specially thank the secretariat, in particular Anne Stuhlmann, for the work on the preparation of this report.

The publication of this 2022 report also marks the start of reflections on the future governance of Europe's ports and on new indicators to include in the future. Monitoring the public private character of foreign investments in Europe's ports could be an additional area to consider, as well as the relationship between the port managing body and its shareholders.

I hope you enjoy reading this 2022 portrait of EU ports' governance.



Annaleena Mäkilä
ESPO Chair

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THE ESPO ‘PORT GOVERNANCE FACT-FINDING REPORT’

‘Trends in EU Port Governance 2022’ is the seventh edition of the ESPO ‘Port Governance Fact-Finding Report’ and builds on a tradition that originated in the 1970s. The aim of these reports is to periodically take stock of port governance and organisation in European seaports and monitor its evolution over time.

Building closely on the findings of the 2016 edition, the 2022 report for the first time investigates the strategic role of the port managing body and its role in the field of circular economy. This ‘Port Governance Fact-Finding Report’ aims in essence to examine and to put to the forefront the multi-faceted roles port managing bodies play beyond the traditional role in the transport sector. European ports are not only critical for maritime transport, but by being at the crossroads of multimodal supply chains and in their function as hubs of energy, industry and blue economy, ports can substantially contribute to a sustainable, digital and resilient European economy.

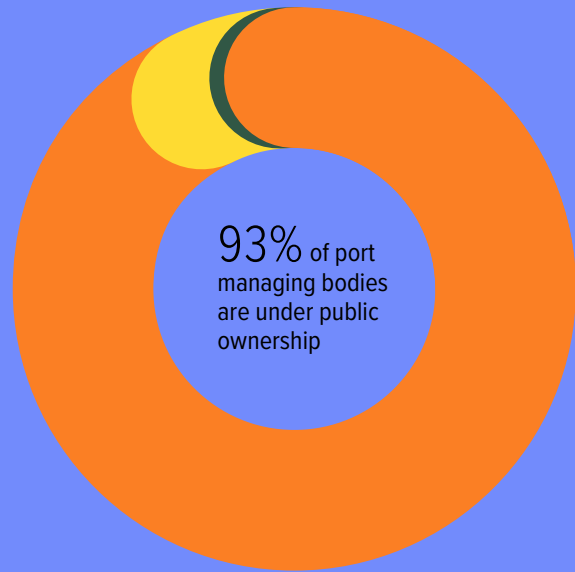
The figures provided in this publication are based on a web-based survey that was accessed by individual port managing bodies directly through ESPO’s PortinSights data platform. 72 port managing bodies from 20 EU Member States and Norway completed the questionnaire, including both TEN-T and non-TEN-T ports. The number of represented countries remained the same compared to the 2016 report and the number of respondents went slightly down, while remaining at a very high level. This decrease can be attributed to the withdrawal of the UK from the European Union and the trend of clustering and merging of port managing bodies, which is underpinned by the findings in this report. This report includes new respondents from Belgium, Cyprus, Denmark, Finland, France, Germany, Ireland, Italy and Lithuania. The level of responses to the very extensive ESPO port governance survey reflects the willingness of the European port sector to transparently share information with each other.

ESPO launched PortinSights (www.portinsights.eu) in 2018 to create a knowledge hub of and for European ports. The digital data platform gathers ports’ throughput data, port governance data and environmental management data (EcoPorts) in one place, facilitating the collection, storage and analysis of the data. PortinSights has been developed based on the outcome of the EU co-funded FP7 project PORTOPIA.

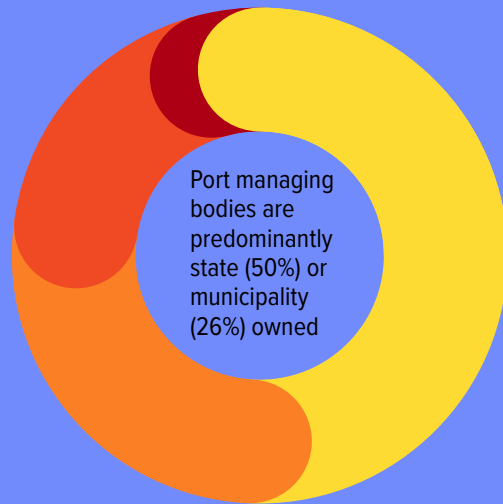
This publication presents only selected findings of the survey. A more comprehensive analysis is being produced and will be the basis for further work of ESPO.

For the purpose of this guide, the term “port managing body” is used as an encompassing term for the various forms of European port governance models. Regardless of ownership and other institutional features, the port managing body assumes public and commercial responsibilities. Nowadays, they often do more than just administering port land and regulating nautical safety. They have a broader range of tasks, adding value to the wider port community, the logistics chain, business and trade in general and the societal and environmental context in which ports operate.

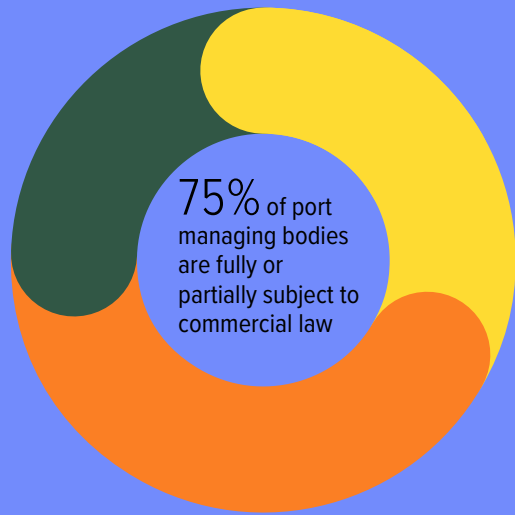
Multiple answers were possible for several questions. Therefore, sums don’t always add up to 100%.



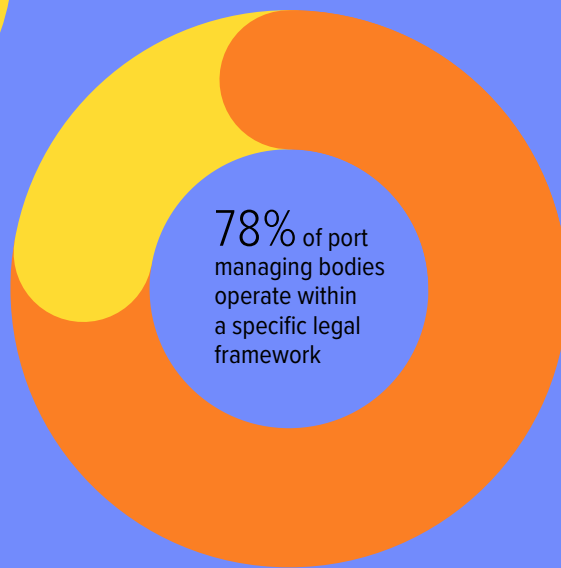
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③



④

① **OWNERSHIP OF EU PORT MANAGING BODIES**
 ● 93% Public ownership
 ● 6% Mixed public-private ownership
 ● 1% Private ownership

EXAMPLE PORT PRIVATISATION IN GREECE
 In 2016, COSCO acquired 51% of the Piraeus Port Authority and increased its shares in 2021 to 67%. Greece's second largest port, the Port of Thessaloniki was privatised in 2018, 67% of the listed shares are held by a consortium of investors (South Europe Gateway Thessaloniki), a minority stake of 7% is being retained by the Greek State, and the other 26% are being traded at the Athens Stock Exchange. The Greek government has since started the privatisation process of several medium-sized ports, including the Ports of Alexandroupoli, Kavala, Igoumenitsa and Heraklion.

hradf.com/en/asset-development/in-progress/infrastructure

② **PUBLIC OWNERSHIP BY LEVEL OF PUBLIC AUTHORITY**
 ● 50% State
 ● 26% Municipality
 ● 18% Combination
 ● 3% Province or other government level

③ **PORT MANAGING BODIES SUBJECT TO COMMERCIAL LAW**
 ● 33% Fully subject
 ● 42% Partially subject
 ● 24% Not subject

④ **PORT MANAGING BODIES GOVERNED BY SPECIFIC LAW/ACTS**
 ● 78% Yes
 ● 22% No

EXAMPLE KLAIPEDA PORT – CHANGE OF LEGAL FORM
 In 2021, the Lithuanian government decided to change Klaipeda State Seaport Authority, among other Lithuanian state-owned companies, into a stock company. The transformation will be finalised by January 2023 and the state of Lithuania will be the sole shareholder. The transformation aims to reduce political influence and increase the port managing body's possibilities for growth and development.

BOTH PUBLIC ROLE AND COMMERCIAL EXPECTATIONS ON THE RISE

Ownership and management of European seaports

In 2022, the vast majority of port managing bodies in Europe are publicly owned. Compared to the last edition, the share of public ownership ① has risen from 87% to 93%. The withdrawal of the UK from the European Union and the subsequent absence of the UK port sector from the respondents explains the decrease in private ownership. While full ownership by the state or by the municipality remains predominant, the share of combined ownership has increased ②. In most cases, the port managing body is set up as a separate legal entity from the local, regional, or national administration and has no share capital.

The majority of European port managing bodies is set up as public limited companies. This set-up requires them to fulfil the conditions of commercial companies, for instance in terms of financial viability or taxation. At the same time, as the ownership remains in public hands, many ports are limited in their decision-making and can be vulnerable to changes in the administration in charge. The degree of public interference in the management can vary considerably for each of these public companies. For European ports it is important to have sufficient autonomy to be able to pursue a coherent and long-term strategy, as well as to be able to balance the public tasks and requirements with commercial expectations.

While operating under different legal forms, port managing bodies mostly share similar business objectives, such as financial stability and maximisation of added value for the port community.

Reinforcing this idea, the survey confirms that, as in 2016, more than three quarters of the responding port managing bodies, irrespective of their legal form, are subject to private commercial law ③. The survey further confirms that most port managing bodies continue to operate within an established legal framework set by specific legal acts (port decrees, port laws, etc.) ④.

Striking the balance of public and business objectives

77% of European port managing bodies consider themselves as mission-driven entities where cost recovery or profit is a must (5). This exemplifies the two-facetted or hybrid character of ports: On the one hand the social and general interest objectives of port managing bodies have risen since the last edition in 2016 and on the other hand port managing bodies are expected to operate financially independently and sustainably and aim to maximise added value not only for port users, but for the wider port community within and beyond the port area.

On average, the income of port managing bodies (6) is made up of 45% port infrastructure charges, 32% land lease/concession contracts and 15% services. The remaining 8% 'other sources' includes public funding. For almost half the respondents, the income from port infrastructure charges¹ make up 50% or more of their overall income.

7 out of 10 respondents reported 'striking the balance between public and private interests' as their expressed goal (7). In order to achieve this goal, port managing bodies pursue a mixture of economic and non-economic objectives. The main economic objectives (8) remain the financial sustainability of the port (28%), the maximisation of port throughput (25%), as well as the maximisation of added value (24%).

Corporate-like objectives such as maximisation of profit of the port managing body or of the (public or private) shareholders have slightly risen from 20% in 2016 to 23% in 2022.

At the same time, the share of port managing bodies pursuing general interest and social objectives has increased across the different activities. Respondents could choose multiple options, if applicable to them. The top 3 objectives are:

- **Social and economic growth of the region:** The contribution of ports to the regional economy can be measured in terms of value added, wages, local and national taxes paid, jobs, etc. Port managing bodies are key to stimulate growth of the regional direct, indirect and induced benefits connected to the ports.
- **Facilitating trade and business:** The most important objective of freight ports is ensuring that companies that use the port to import or export remain highly competitive.
- **Ensuring that port activity is sustainable in the long run:** This clearly shows that port managing bodies work towards balancing the economic, social and environmental effects of the port activities.

SOCIAL AND GENERAL INTEREST OBJECTIVES OF PORT MANAGING BODIES

| | |
|--|-----|
| Social and economic growth of the region | 90% |
| Facilitate trade and business | 89% |
| Ensure sustainability of the port activities | 87% |
| Develop maritime and hinterland connectivity | 72% |
| Create employment in the region | 71% |
| Promote and support leisure, tourism, sport and other related activities | 33% |
| Be part of the emergency supply chain | 33% |
| Ensure transport connection to/from a peripheral area or island and the mainland | 31% |
| Other | 3% |

1. (EU) 2107/352 'port infrastructure charge' means a charge levied, for the direct or indirect benefit of the managing body of the port or of the competent authority, for the use of infrastructure, facilities and services, including the waterway access to the port concerned, as well as access to the processing of passengers and cargo, but excluding land lease rates and charges having equivalent effect.

(5)

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

(6)

AVERAGE PERCENTAGE OF PORT INCOME SOURCE

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

(7)

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

EXAMPLE PORT OF ROTTERDAM – ACCELERATOR OF SUSTAINABILITY

The Port of Rotterdam Authority is an autonomous company with two shareholders, the Municipality of Rotterdam and the Dutch state. While the Port of Rotterdam is an unlisted public limited company, it implements the provisions of the corporate governance code. The central focus of the Port of Rotterdam is on generating social and economic impact that goes beyond simply increasing volume.

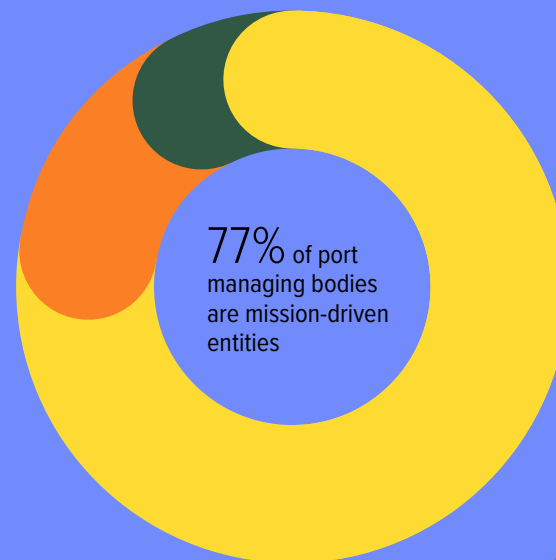
As an accelerator of sustainability in the port, the port aims to achieve a carbon reduction of 49% relative to 2019 by 2030.

www.portofrotterdam.com/en/about-port-authority/mission-vision-and-strategy

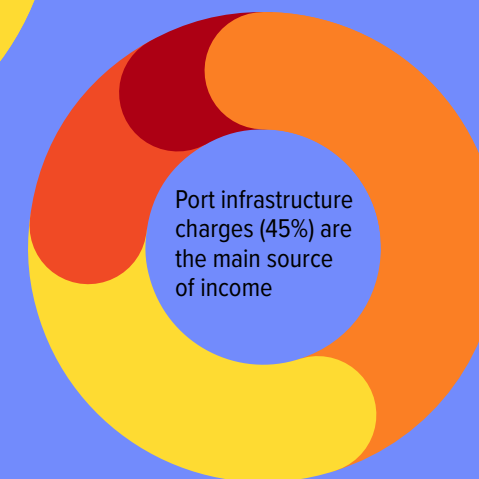
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BUSINESS OBJECTIVES OF THE PORT MANAGING BODY

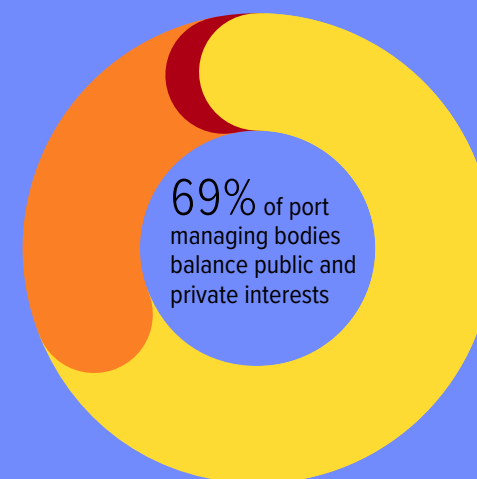
- 28% Financial stability of the port managing body
- 25% Maximisation of port throughput
- 24% Maximisation of added value for port users and/or region
- 11% Profit maximisation for the port managing body
- 8% Maximisation of shareholders' return
- 4% Profit maximisation for the companies active in the port



(5)



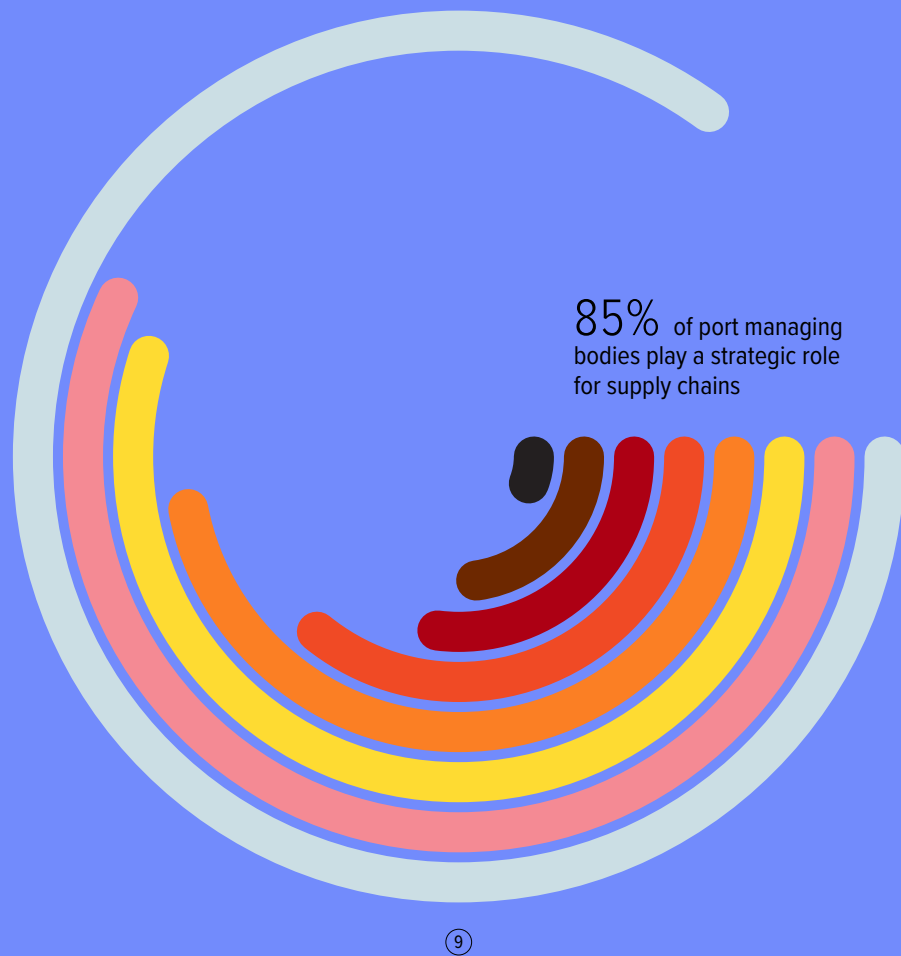
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PORT ACTIVITIES CONSIDERED STRATEGIC FUNCTIONS

- 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

The strategic role of seaports

A significant increase (compared to 2016) has been registered for social and economic growth of the region, as well as for improved connectivity objectives and being part of emergency supply chains. For 85% of European port managing bodies, supply chain operations are considered as a strategic function ⑨. Other strategic functions include food storage, passenger transport, access to essential industries and activities in the field of energy. For 84% of respondents, their strategic function has been formalised in the mission or objectives of the port managing body. While the impact of the COVID-19 pandemic has highlighted the strategic function of a port, it has not changed the definition of its strategic function.

The observation that both the public role and the commercial expectations of seaports have been increasing since the 2016 edition of 'Trends in EU Port Governance' is also supported by the findings of the joint Deloitte ESPO study 'Europe's ports at the crossroads of transitions' from 2021². The study found that more than before, ports are expected to be commercially focused entities, but that —at the same time— the public function and role of ports is growing again, mostly driven by their increased importance as strategic assets and the role they play in the greening of transport, industry and energy generation.

2. www.espo.be/news/joint-deloitte-espo-study-europes-ports-at-the-crossroads-of-transitions

ACTIVE MANAGERS OF AN EXTENSIVE PORT ECOSYSTEM

Increasing roles on top of landlord function

Almost half of the respondent port managing bodies fully or partially own the land they manage ⁽¹⁰⁾, as was the case in 2016. 51% of port managing bodies do not own the land, but operate under a legal framework which entitles them to manage the port land on behalf of the owner. These frameworks include among others concession or lease agreements from the state, service agreements with the region or derive from specific laws or regulations. The ownership of the port land, when it is not owned by the port managing body, is mostly in the hands of the state (63%) or the municipality (35%), confirming the results of 2016 ⁽¹¹⁾.

On top of the classic landlord function and their role in maritime and hinterland transport connections, port managing bodies not only become more involved in other sectors, but also take on increasingly active roles. The different roles in the field of industry and energy will be explored more in depth in later chapters, but it is noteworthy that the number of port managing bodies involved in these sectors has been increasing and the port managing body is more often than before an active initiator, facilitator, or (co-)investor.

Additionally, more than two thirds of port managing bodies also partner in innovation projects with customers, port operators or other companies as a way to stimulate the uptake of innovative solutions in the port. The adoption of emerging technologies and digitalisation has significantly increased in the port sector since 2016, with 72% of port managing bodies active in this field ⁽¹²⁾. Almost half of European port managing bodies are working to create an innovation ecosystem in the port, bringing together resources and actors in a favourable environment for innovation.

⁽¹⁰⁾ OWNERSHIP OF THE PORT LAND BY THE PORT MANAGING BODY

- 51% Port managing body does not own the land
- 28% Full ownership of the land
- 21% Partial ownership of the land

⁽¹¹⁾ (CO-)OWNERS OF THE PORT LAND

- 63% State
- 35% Municipality
- 13% Private sector
- 12% Region
- 4% Other

⁽¹²⁾ STIMULATING INNOVATION IN THE PORT

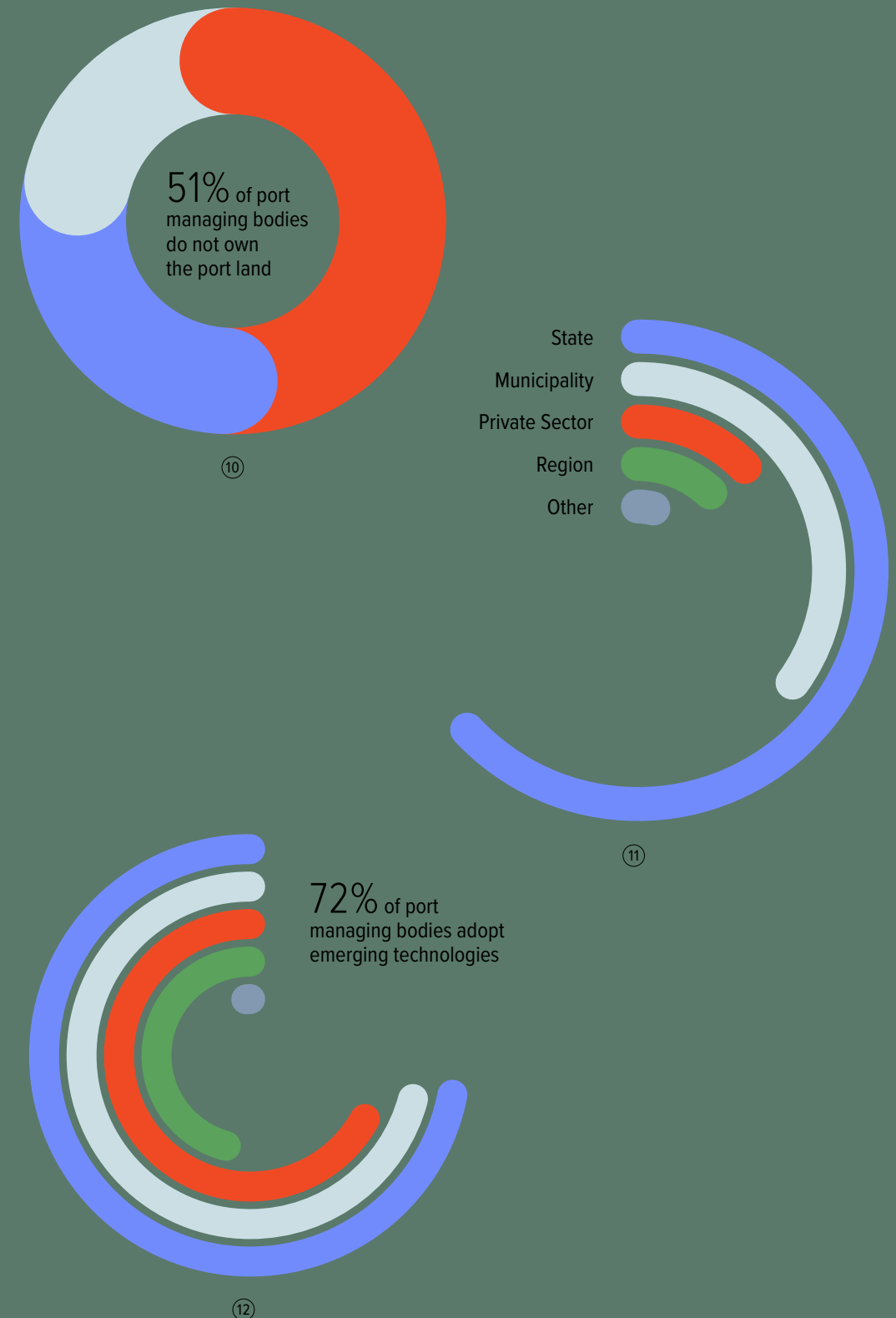
- 72% Adopting emerging technologies and digitalisation
- 71% Looking for new business models and opportunities for the Port Managing Body
- 67% Partnering in projects with customers, port operators and other companies
- 46% Creating an innovation ecosystem in the port
- 1% Other

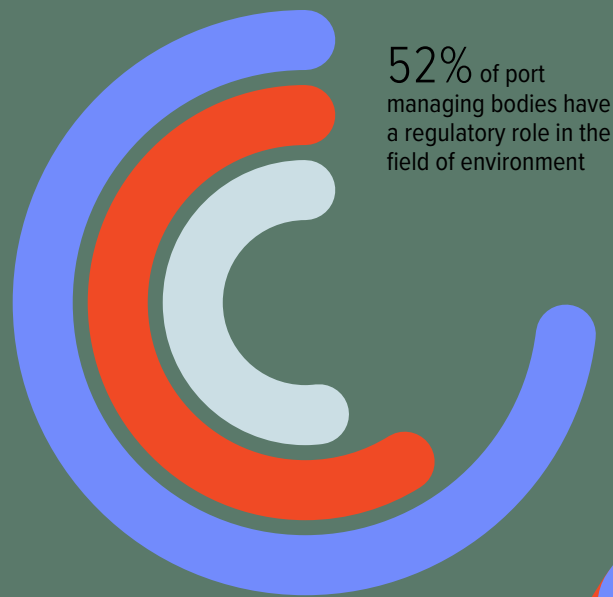
EXAMPLES HAMBURG PORT AUTHORITY (HPA) – SMARTPORT CONCEPT

The HPA is improving the port's efficiency through the use of intelligent solutions for the flow of traffic and goods. The smartPORT logistics combines economic and ecological aspects in three sub-sectors: traffic flows, infrastructure and the flow of goods. An intermodal PortTraffic centre for sea, rail and road transport forms the basis for networking the flow of traffic: optimum data capture and rapid information sharing allow logistics managers, carriers and agents to select the most efficient means of transport for their goods. www.hamburg-port-authority.de/de/hpa-360/smartport

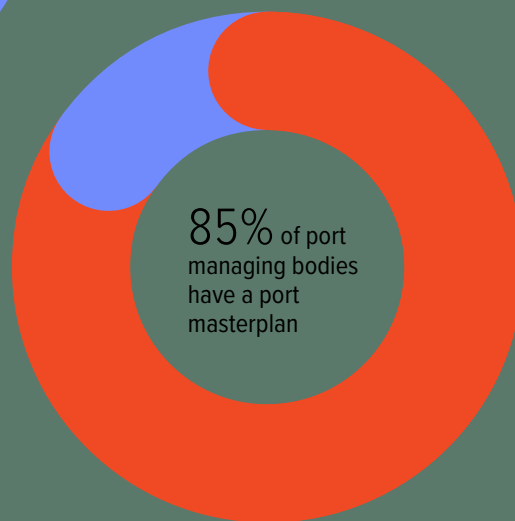
VALENCIAPORT – OPENTOP

In March 2022, Fundación Valenciaport, the knowledge and innovation centre of Valenciaport, launched Opentop with the purpose of building safer, smarter, and more sustainable ports. Opentop will give participating start-ups the opportunity to work directly from and with the companies in the port community of Valencia, fostering not only regional, but also national and international entrepreneurship. opentop.es





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13

REGULATORY ROLE OF PORT MANAGING BODIES

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

14

PORT MANAGING BODIES WITH A PORT MASTERPLAN

- 85% Yes
- 15% No

EXAMPLE DUBLIN PORT – MASTERPLAN 2040 REVIEWED 2018

In 2012, the Port of Dublin published its Masterplan 2040. Since then both economic and political developments have taken place, which have been accounted for in the updated 'Dublin Port Masterplan 2040 Reviewed 2018'. In addition to reviewing the Masterplan, new and updated environmental analyses have been prepared and extensive public and stakeholder consultations have been carried out. In parallel, Dublin Port is already looking past 2040 at the next generation of infrastructure required once Dublin Port reaches full capacity by 2040. www.dublinport.ie/masterplan

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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

Diversity in regulatory roles

The Port Services Regulation (EU) 2017/352 defines the administration and management of the port infrastructure as the core task of port managing bodies, which can be carried out in conjunction with other tasks³. This definition demonstrates that European port managing bodies can have very narrow tasks and competences (infrastructure management) or a much wider focus and numerous tools at their disposal. EU rules on port governance do not assign regulatory competencies to port managing bodies or task them with the implementation of certain policy goals.

The responses to the ESPO Port Governance Fact Finding survey show that the majority of European ports has a regulatory role in the fields of security (73%) and safety (59%), of which about 90% issue their own regulations, mostly to transpose legal requirements. In the field of environmental regulation, 52% of port managing bodies hold a regulatory role, while 47% of respondents do not have such power¹³. Similar as in the field of security and safety, most respondents (84%) with a regulatory role in the field of environment issue their own regulations. Whereas the majority transposes legal requirements through the regulations, 28% of respondents go beyond the transposition of legal requirements, which is a higher share than in the area of security and safety.

The data suggests that there are limitations to the tools port managing bodies can use in order to promote environmental sustainability, as almost half of the respondents do not have a regulatory role in this field. On the other hand, the port managing bodies that do have such powers in many cases already go beyond what is legally required of them.

Strategic planning and stakeholder involvement

Port managing bodies are in most cases responsible for port development. Producing a port masterplan has already been a common practice in 2016. The 2022 results confirm that the necessity of strategic planning has only increased since: Compared to 64% port managing bodies in 2016, 85% of respondents have introduced a masterplan¹⁴, of which 39% date from 2020 or later. While we can observe the increased need for strategic long-term planning, the shortening average duration and planning horizon of these masterplans suggest that it has become inherently more difficult to look too far in the future. Masterplans dating from before 2020 have an average duration of 16.5 years. In contrast to that, masterplans adopted in 2020 or later have an average duration of 12.8 years and range from a 5-20 years span, rather than the previous up to 30 years longevity.

A port masterplan provides a clear vision on how the port will be developed and shows the potential impact on the surrounding community. For ports it has become impossible to make a masterplan without consulting the key stakeholders and users in the port. Their development strategies and intentions (e.g. new vessel sizes, different greening options, technological developments and choices) have to be taken into account. At the same time, it is crucial in this process that the community surrounding the port and its stakeholders must have the opportunity to raise their concerns and expectations. Not only does the masterplan set out the port's strategic planning for the medium to long term, it also provides credibility to the port managing body when searching for public and private investors. For these reasons, the port managing body involves many stakeholders in the process of producing a masterplan, such as public authorities at different levels, citizens, NGO's and key stakeholders like port employees, tenants and users¹⁵.

3. (EU) 2017/352 'managing body of the port' means any public or private body which, under national law or instruments, has the objective of carrying out, or is empowered to carry out, at a local level, whether in conjunction with other activities or not, the administration and management of the port infrastructure and one or more of the following tasks in the port concerned: the coordination of port traffic, the management of port traffic, the coordination of the activities of the operators present in the port concerned, and the control of the activities of the operators present in the port concerned.

MORE COOPERATION WITHIN AND BEYOND THE PORT

Clustering and merging of ports

The increased cooperation of neighbouring ports was already an increasing trend between 2010 and 2016, which happened either bottom-up, as a result of cooperation between port managing bodies, or driven by government policy. On the one hand, many of today's challenges, such as geopolitical changes or tensions, the energy transition, the scaling-up and integration of the shipping sector or technological complexity can be beyond the means of a single port managing body to tackle. On the other hand, the scarcity of available port land enlarges the case for port cooperation.

The survey results confirm that the share of port managing bodies managing a single port has decreased since the last edition. Today, half of European port managing bodies manage two or more ports, compared to 44% in the last edition (16). This trend has been manifested by the Italian port reform, which entered into force in 2018, clustering port managing bodies into port system authorities and by recent mergers, such as North Sea Port (Ghent, Vlissingen, Terneuzen) in 2018, HAROPA PORT (Le Havre, Rouen, Paris) in 2021 and Port of Antwerp-Bruges (Antwerp, Zeebrugge) in 2022.

Societal integration

Most of the ports surveyed are located in or very close to an urban area (95% of respondents). Proximity to urban centres not only brings benefits and opportunities, but may trigger tensions and the need to reconcile different interests. Finding the optimal balance between port management and development, the needs of urban centers and the well-being of the local community is one of the main challenges of port managing bodies today. Port managing bodies, therefore, need to proactively manage the city-port relation to secure their "licence to operate".

Overall, the share of port managing bodies designing and implementing initiatives to improve the relation with the surrounding community has increased across all surveyed areas (17). These include initiatives to establish good cohabitation, initiatives to make society experience and understand the port and initiatives to attract young people to work in the port. 95% of the respondents lead initiatives focused on the good co-habitation with local communities in and around the port.

To promote social integration of ports, ESPO published in 2010 a Code of Practice on Societal Integration of Ports⁴ and in 2009 created the annual 'ESPO Award'. The Award's focus is each year on a different aspect of social integration, to give visibility to the various efforts made by European ports to enhance the city-port relations through innovative projects.

An independent jury selects each year the best initiative among the submitted applications. In 2021, the Port of Gdansk won the thirteenth ESPO Award on Social Integration of Ports themed 'Role of ports in the recovery of the city and the local community' (following the severe impacts of the COVID-19 pandemic).

16 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

EXAMPLES NORTH SEA PORT, HAROPA PORT, PORT OF ANTWERP-BRUGES – PORT MERGERS

In 2018, the Belgian Port of Ghent and the Dutch Zeeland Seaports merged into the cross-border North Sea Port. North Sea Port operates under a holding company (European Public Limited Liability Company) and two subsidiary companies (Zeeland Seaports and Ghent Port Company).

In 2021, the French HAROPA port grouping (Le Havre, Rouen and Paris) formally merged into HAROPA PORT, with headquarters in Le Havre and area management bodies based in Paris, Rouen and Le Havre. Each of these has a regional development board to represent local interests.

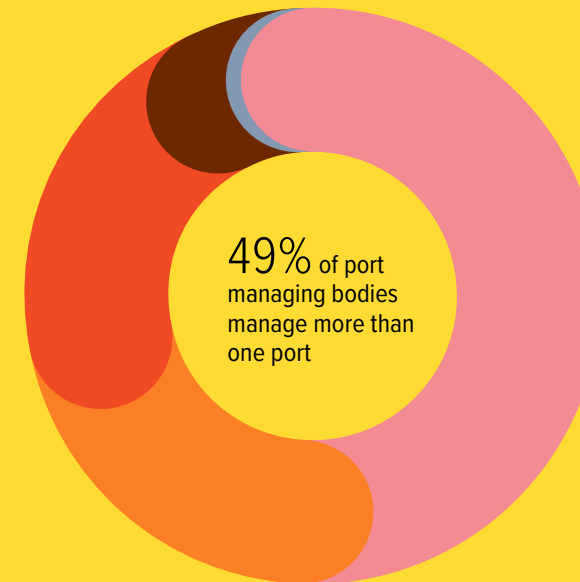
In 2022, the Belgian ports of Antwerp and Zeebrugge merged into the Port of Antwerp-Bruges. The port is a limited liability company under public law, in which the City of Antwerp (80.2%) and the City of Bruges (19.8%) are the sole shareholders.

EXAMPLE ITALIAN PORT REFORM – PORT SYSTEM AUTHORITIES

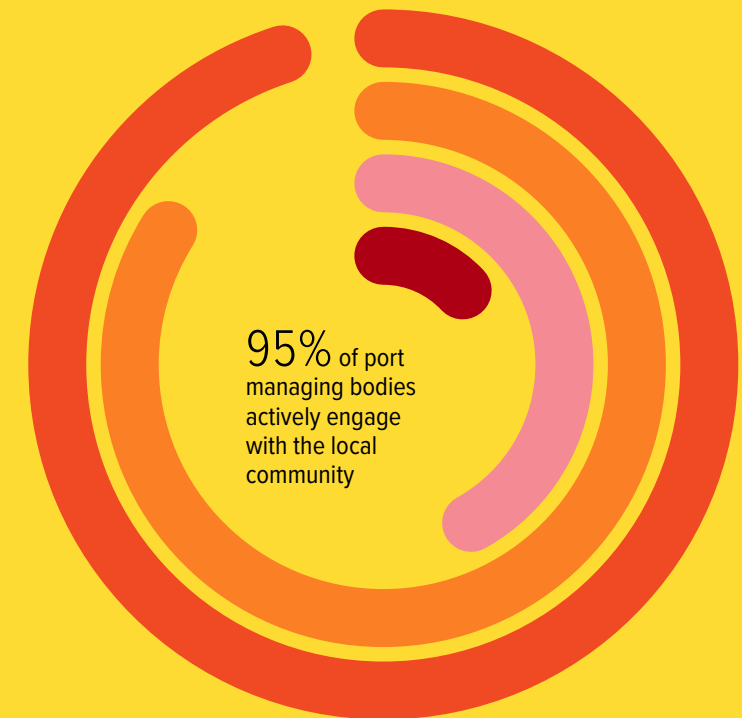
The Italian government's port reform entered into force in 2018, merging the 24 previously existing port authorities into 15 port system authorities (PSAs). The PSAs inherited the duties and the power of the traditional port authorities, with a broader geographical scope. The central government appointed the president of each PSA.

17 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

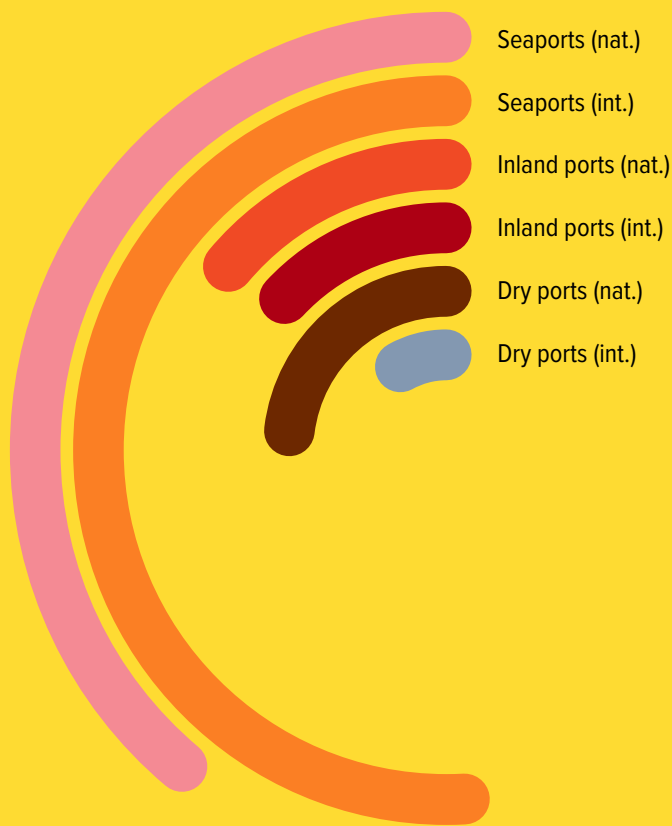


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4. www.espo.be/media/espopublications/ESPOCodeofPracticeonSocietalIntegrationofPorts2010.pdf



18

18

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

EXAMPLE MoU ON ONSHORE POWER AMBITIONS FOR CONTAINER TERMINALS IN PORTS

The ports of Antwerp, Bremen/Bremerhaven, Hamburg, HAROPA PORT and Rotterdam have concluded a Memorandum of Understanding (MoU) on their OPS ambitions. With the MoU, the parties agree on the deployment of OPS for seagoing vessels at container terminals in their ports (berths regularly serving Ultra Large Container Vessels) as a first step towards zero emission shipping. The OPS installations should be operational latest by 2028.

Partnerships among ports

Not only do ports increasingly organise in clusters or merge with other port managing bodies, strategic partnerships on specific topics with other seaports either at national or international level are also taken up 18. The most common forms of cooperation are between seaports both on international and national level and with dry ports on a national level. Such partnerships may include joint promotion efforts, developing joint ICT projects, joint energy projects or participation in European projects under the EU's Connecting Europe Facility, HorizonEurope or the Interreg program.

A striking example of such cooperation was the HorizonEurope 'Green ports Call' which was open for applications by consortia of ports, including at least one inland port. The European Commission received 28 applications, out of which two projects were selected for funding. Under the MAGPIE project 45 partners, including the ports of Rotterdam and Sines, as well as HAROPA Port and DeltaPort, collaborate to force a breakthrough in the supply and use of green energy carriers in transport to, from and within ports. The second selected project, PIONEERS, will lead efforts towards climate neutral ports with the participation of the Ports of Antwerp-Bruges, Barcelona, Constanta and Venlo among the 46 project partners.

It is noteworthy to acknowledge that many ports of the other submitted projects, which did not win the co-funding, are still looking for ways to implement the envisioned projects, or parts thereof, together.

KEY PLAYERS IN THE SUPPLY CHAIN

Port Services remain in private hands

The Port Services Regulation (EU) 2017/352, establishing a framework for the provision of port services, was adopted in 2017 and became applicable in March 2019. The implementation has not changed the overall picture of the organisation of port services in European ports. The operation of the main services provided to ships (19) remain predominantly in private hands with the exception of pilotage, which is still under considerable public influence. While the role of the port managing body has increased for mooring (35%) and waste reception facilities (51%) compared to 2016, the remaining port services are overwhelmingly provided by private operators, with the exception of onshore power supply. As the provision of onshore power supply is still in a premature stage and there is so far no business case for the development and operation of OPS facilities, or tendering procedure in place, the service is less frequently provided by private operators.

Cargo handling services (20) are in the hands of private operators who are generally granted the use of port land through lease agreements or public domain concessions. Integrated ports where port managing bodies provide a full range of services and other mixed cases remain the exception. As indicated by the responses, transport services are provided by private parties in most cases.

Rail management in European seaports

The majority of European port managing bodies does not play a role in the operation of rail operation. These are predominantly in the hands of private operators (86%). In terms of rail infrastructure management, 63% of port managing bodies manage the rail infrastructure in the port themselves, while 28% of respondents are not in charge of the rail infrastructure. In these cases, it is usually the national rail infrastructure manager, who is in charge of rail infrastructure development inside the port area. Mixed systems, where for example both the port managing body and the national infrastructure manager are each responsible for parts of the network, or systems where the national rail infrastructure manager is responsible for the management, but the port managing body responsible for investments, also exist.

19 PROVISION OF PORT SERVICES TO SHIPS

19A Pilotage outside the port area

- 9% Port managing body
- 40% Government
- 49% Private operator
- 8% Other
- 24% Not applicable

19B Pilotage inside the port area

- 20% Port managing body
- 29% Government
- 51% Private operator
- 7% Other
- 1% Not applicable

19C Towing outside the port area

- 7% Port managing body
- 7% Government
- 92% Private operator
- 3% Other
- 15% Not applicable

19D Towing inside the port area

- 13% Port managing body
- 4% Government
- 89% Private operator
- 1% Other

19E Mooring

- 35% Port managing body
- 4% Government
- 76% Private operator
- 3% Other

19F Waste reception facilities

- 51% Port managing body
- 1% Government
- 63% Private operator
- 1% Other

19G Onshore power supply

- 69% Port managing body
- 2% Government
- 38% Private operator
- 34% Not applicable

19H Bunkering

- 3% Port managing body
- 94% Private operator
- 3% Other
- 1% Not applicable

20 PROVISION OF SERVICES TO CARGO

20A Cargo handling on board ship

- 10% Port managing body
- 96% Private operator
- 1% Other

20B Cargo handling ship-shore

- 19% Port managing body
- 90% Private operator
- 1% Other

20C Cargo handling shore-inland transport

- 7% Port managing body
- 1% Government
- 97% Private operator
- 1% Other

20D Logistics services

- 11% Port managing body
- 99% Private operator
- 1% Other

20E Warehousing services

- 16% Port managing body
- 94% Private operator
- 1% Other

20F Road haulage

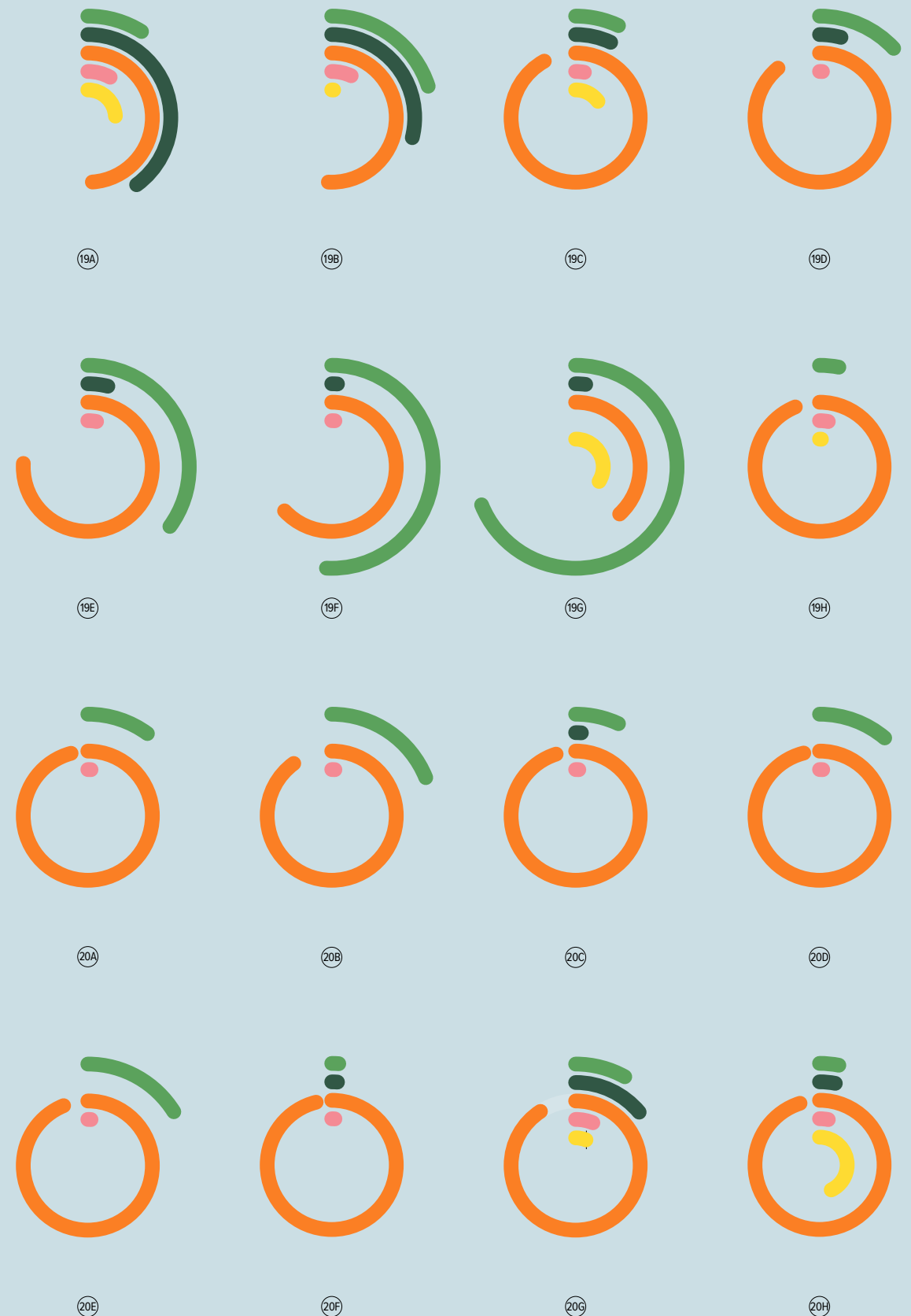
- 1% Port managing body
- 1% Government
- 97% Private operator
- 1% Other

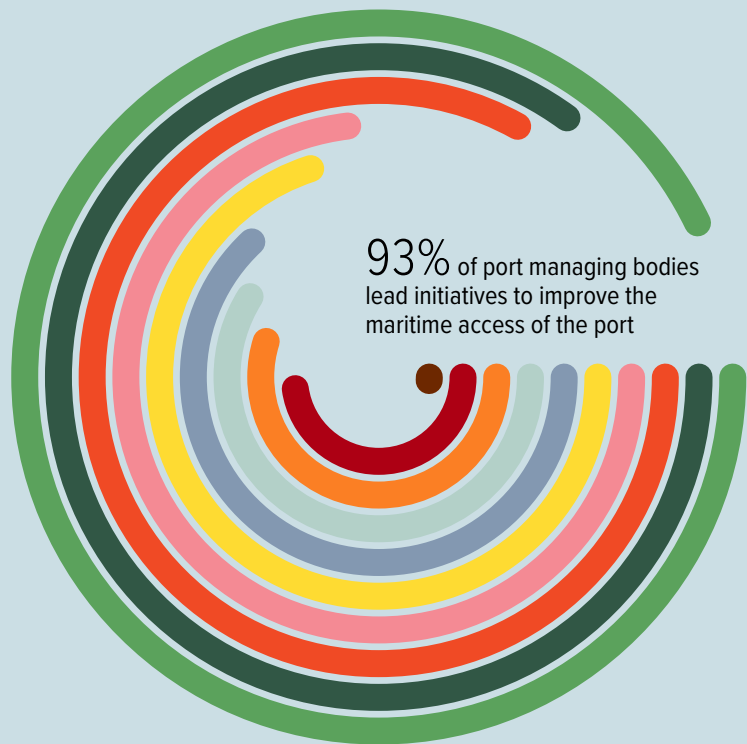
20G Rail operation

- 8% Port managing body
- 14% Government
- 91% Private operator
- 6% Other
- 6% Not applicable

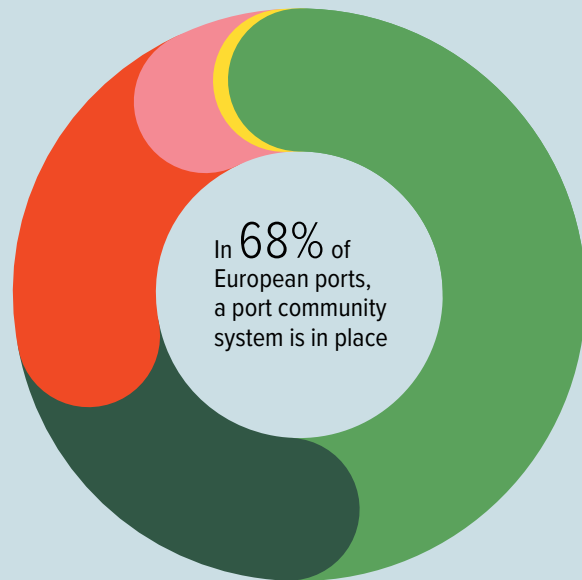
20H Inland barging

- 3% Port managing body
- 3% Government
- 98% Private operator
- 3% Other
- 43% Not applicable

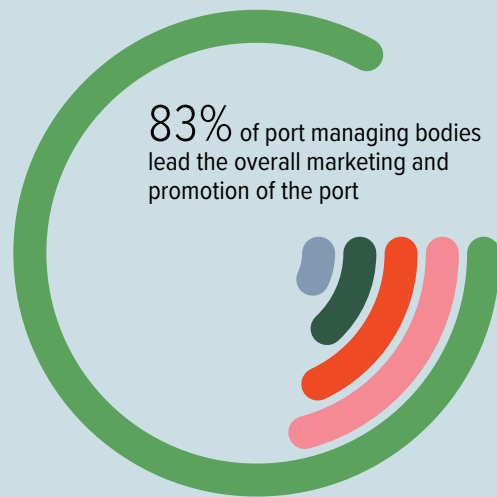




21



22



23

21

AREAS IN WHICH PORT MANAGING BODIES ARE LEADING INITIATIVES TO IMPROVE THE COMPETITIVENESS OF THE PORT

- 93% Improvement of maritime access of the port
- 85% Improvement of the hinterland connections of the port
- 83% Improvement of land access to the port
- 73% Facilitation of administrative procedures
- 70% Intermodal operations in the port
- 63% Deployment of ICT (Information and Communication Technologies)
- 59% Fostering innovation
- 55% Reengineering of processes
- 48% Performance of government agencies acting in the port (customs, health, etc.)
- 1% Others

EXAMPLE THE PORT OF OULU – PROJECT PORT OULU SMARTER

The Port of Oulu has won a 5G innovation competition in April 2020. The objective of the ‘Port Oulu Smarter’ project is to set up a new, versatile digital infrastructure in the port area of the Port of Oulu to serve the extensive Port ecosystem and its current and new customers. Within the framework of the project, the Port of Oulu will develop, test and make use of the first 5G solutions for industry and logistics in collaboration with its network partners. ouluport.com/en/port-oulu-smarter-project-wins-top-prize-in-5g-momentum-innovation-competition

22

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

23

ACTIVITIES PERFORMED BY PORT MANAGING BODIES IN THE FORELAND

- 83% Marketing and promotion of the home port
- 21% Port development services
- 18% Consulting and advisory services
- 13% Port management services
- 7% Investments in foreland ports

EXAMPLE PORT OF TRIESTE – INVESTING OUTSIDE THE PORT

The Port System Authority of the Eastern Adriatic Sea, owns 33.33% of Alpe Adria S.p.a. which is a multimodal transport operator (M.T.O.) that coordinates road, rail and sea carriers in order to organise and handle intermodal and combined transportation of goods and consignments. The Port System Authority of the Eastern Adriatic Sea, Friulia S.p.a. (the private equity investment arm of the Friuli Venezia Giulia Region) and Trenitalia S.p.A. (State Railways Group) all hold an equal stake in the company. documenti.comune.trieste.it/portovecchio/promotional_kit_eng.pdf

Initiatives to improve competitiveness and added value

European port managing bodies are proactive infrastructure managers who lead initiatives to enhance the competitiveness and added value, not only for the port, but for the logistics chain as a whole. Across all surveyed areas, the active role of port managing body has increased (21).

The top focus areas include the improvement of maritime and land access as well as of the hinterland connections of the port. Notably, the fostering of innovation has risen from 45% in 2016 to 59% in 2022. Other important initiatives include the deployment of ICT, the facilitation of administrative procedures and the performance of governance agencies acting in the port (f.e. customs).

In the ports of two thirds of the respondents Port Community Systems are in place. Half of European port managing bodies are operating these systems themselves, in only 18% of ports is the system operated by a third party (22).

Investing beyond the port area

European port managing bodies’ initiatives are not limited to the port area and the surrounding community. 37% of respondents invest beyond the port perimeter directly in hinterland networks, at national and international level. In some Member States, however, the legal framework does not allow port managing bodies to invest outside of the port area.

In addition, port managing bodies also lead initiatives targeted at the foreland (23). Only 14% of respondents report no activities in this regard. While marketing of the home port remains the most important initiative (83%), port development services have seen the biggest increase since 2016 putting such initiatives in second place with 21%. Investments in the foreland remain limited with only 7% of respondents replying positively.

ENERGY INCREASINGLY PART OF THE PORT BUSINESS

The main entry points of energy commodities

Ports have always played a key role in the import, export, storage and distribution of fossil and other energy sources (crude oil, gas, LNG, coal, biomass, etc.) Most ports are in close proximity of large population concentrations and/or home to industrial clusters, which makes them well-suited entry points for energy commodities.

While energy commodities still represent a substantial part of traffic volumes of many European ports, the average share has been decreasing since 2016 (24). 39% of port managing bodies report that the percentage of energy-related traffic is between 10–30% of the total throughput. In contrast, the number of ports registering 30–50% or 50+% of energy-related throughput is decreasing. The energy transition, but also recent crises such as the COVID-19 pandemic are having a significant impact on these commodities and are therefore very relevant for the ports' business and strategy planning. The Russian invasion in Ukraine risks to create a major disruption and even radical change of the energy supply in Europe, and will have a significant impact on the (energy) ports.

Locations for energy production

Ports are traditional locations for energy production because of their access to raw energy sources. The survey shows that 50% of respondent ports have energy production plants located in the port area, remaining at the same level as in 2016.

While the traditional fossil-fuel energy plants are decreasing, ports are increasingly generating sustainable energy with wind and solar, and biomass (25). In particular, solar energy has increased from 31% in 2016 to 58% in 2022. The top 3 energy sources are solar (58%), biomass (36%) and wind (33%), with solar and biomass surpassing oil/petroleum and coal and coke for the first time. Furthermore, the potential of recycled heat and steam as energy sources is increasingly investigated and exploited by port managing bodies.

Enablers of the energy transition

As mission-driven entities, European port managing bodies want to be an active partner in achieving the EU Green Deal objectives and play a central part in enabling the energy transition. Not only do port managing bodies strive to improve their own environmental management and climate efforts, but they also play an active role for the decarbonisation of the port ecosystem and beyond.

Port managing bodies take on increasingly active roles in the field of energy. The number of port managing bodies hosting renewable energy production and promoting its uptake has seen a significant increase of 20% since 2016 (26). Today, 65% of respondent port managing bodies secure land to generate or support clean energy, thus fulfilling their traditional role as landlords. Beyond that, port managing bodies increasingly take on more active roles, such as initiator/facilitator (51%) or even (co-)investor (24%). Such renewable energy production in the port area could be fed back into the grid, with ports acting as important gateways for imports of renewable energy and sustainable fuels to Europe. That makes them crucial to the import and export of hydrogen and renewable energy from outside the EU. Furthermore, ports provide the site for the production of hydrogen or hydrogen-derived fuels such as ammonia, with a large number of ports currently considering the introduction of Power-to-X solutions in ports, using electricity to produce hydrogen, methane and ammonia.

(24) 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%

EXAMPLE PORT OF AMSTERDAM – COAL TRANSHIPMENT

In 2017, the Port of Amsterdam set the objective to stop the transshipment of coal in the port after 2030. The strategic plan 2021-2025 goes a step further, by setting concrete goals for alternative fuels and non-fossil revenues, which should account for 65% of the port's total turnover by 2024.

www.portofamsterdam.com/en/news/port-amsterdam-wants-be-frontrunner-transition

(25) 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

EXAMPLE PORT OF ESBJERG – OFFSHORE ENERGY

The Port of Esbjerg is the leading port in Europe in terms of handling and shipping out wind power. The port played a key role in the development of Denmark's offshore wind industry. Today, the Port of Esbjerg has specialised facilities and flexible areas for transporting, pre-assembling, shipping out and servicing offshore wind turbines. portesbjerg.dk/en/port-facilities/oil-gas-offshore-wind

SZCZECIN AND ŚWINOUJŚCIE SEAPORTS – LNG TERMINAL EXTENSION

The LNG Terminal extension in the Port of Świnoujście will enhance the region's energy security and diversify gas supply sources.

The investment will increase the current capacity but also enable new functionalities of the facility, such as bunkering of vessels directly at the new quay under construction.

The extension includes the construction of a loading and unloading berth, servicing LNG gas carriers, bunkers and feeders.

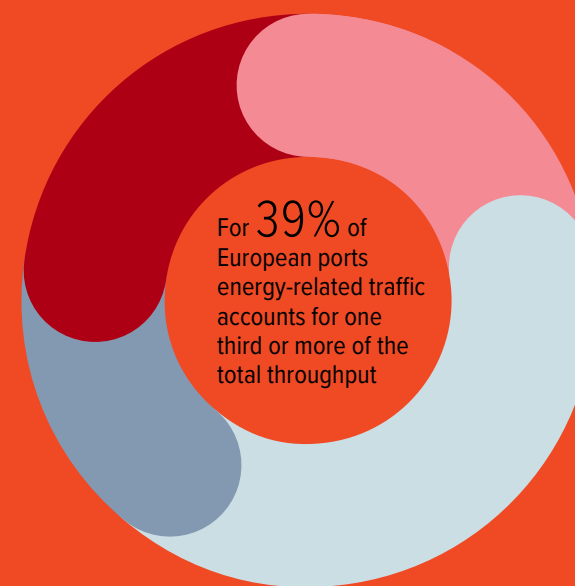
terminalng.gaz-system.pl/en/lng-terminal/lng-terminal-in-swinoujscie

(26) ROLE OF PORT MANAGING BODY IN THE PRODUCTION OF RENEWABLE ENERGY

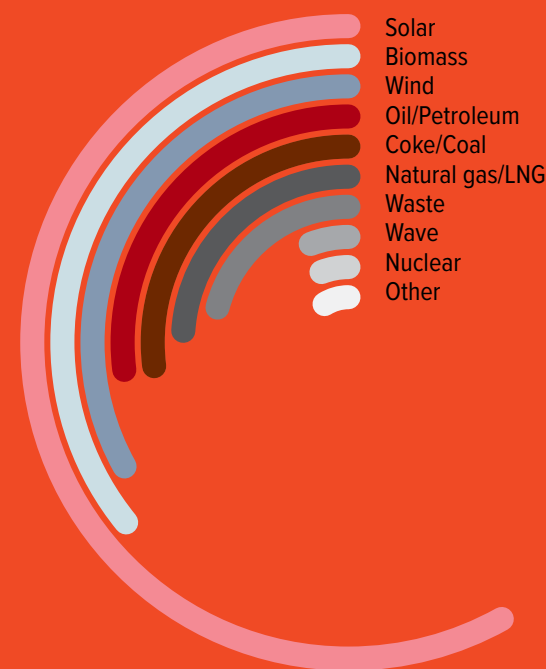
- 65% Provider of land
- 51% Initiator/facilitator
- 24% Investor/co-investor
- 22% Logistics support
- 11% Operator of the facilities
- 14% Other roles

EXAMPLE PORT OF ANTWERP-BRUGES – ACQUISITION OF PIPELINE COMPANY

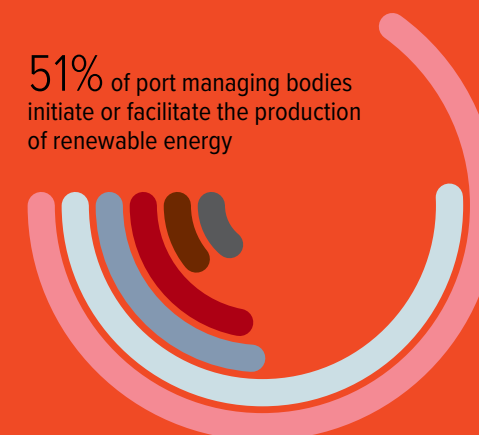
End of 2017, Antwerp Port Authority acquired Nationale Maatschappij der Pijpleidingen (NMP). With the takeover the Port of Antwerp-Bruges gained ownership and control of 720 km of pipelines, 90% of which serve the chemical and petrochemical companies at the Antwerp port platform and its hinterland. www.portofantwerp-bruges.com/en/business/transport/pipelines



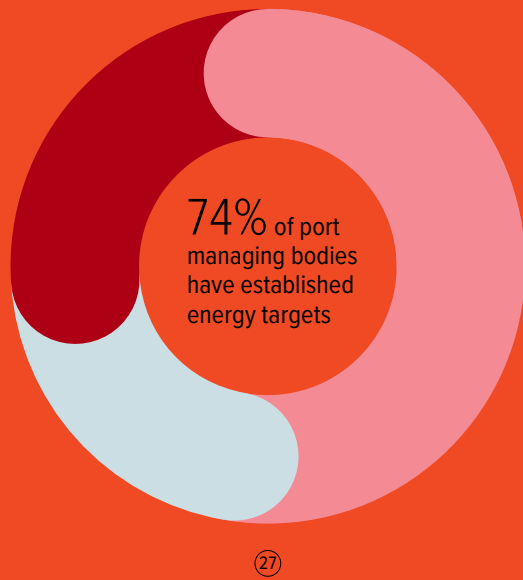
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(25)



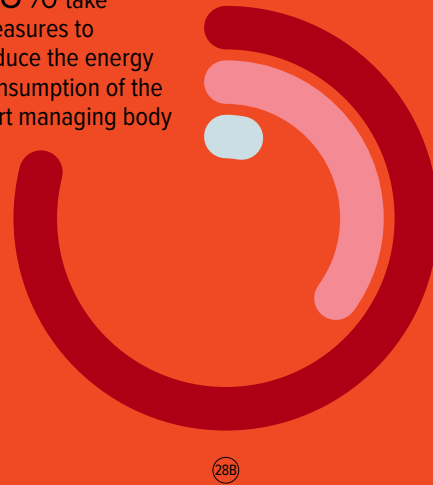
(26)



79% monitor the energy consumption of the port managing body



88% take measures to reduce the energy consumption of the port managing body



80% take measures to improve the energy efficiency of the port managing body



27 **TARGETS RELATED TO ENERGY CONSUMPTION AND EFFICIENCY**

- 53% Yes, at the port managing body level
- 21% Yes, for the port as a whole
- 26% No targets

28 **KEY MEASURES PUT IN PLACE BY PORT MANAGING BODIES**

28A **Monitoring the energy consumption**

- 79% Port managing body
- 35% Tenants
- 3% Others

28B **Reduction of energy consumption**

- 88% Port managing body
- 44% Tenants
- 4% Others

28C **Improvement of energy efficiency**

- 90% Port managing body
- 46% Tenants
- 3% Others

EXAMPLE PORT OF SINES – GREEN HYDROGEN (SOLAR)

The Port of Sines is set to become the hub for green hydrogen in Portugal, with a planned electrolyzing capacity of 2.5 GW by 2030, and 265 MW in 2025. The production will rely on photovoltaic electricity. The recently signed EU co-funded project GreenH2Atlantic project to demonstrate the viability of green hydrogen production will develop a first-of-a-kind 100 MW electrolyzer to produce green hydrogen from new fields of renewable electricity (wind and solar).

Energy targets and measures increasingly common

The ESPO Environmental Report 2021⁵ revealed that energy efficiency is the third environmental priority of European ports, closely following air quality and climate change. This demonstrates that port managing bodies are highly concerned with reducing energy use and increasing energy efficiency. Compared to 2016, the number of port managing bodies setting energy targets has increased significantly (27). 53% of respondents set targets for the port managing body's owned and controlled facilities. 21% of port managing bodies extend these targets to all port operations and facilities. The ability to set and implement such targets depends strongly on the governance model and tools of the port managing body.

Looking at the key measures put in place by port managing bodies, an increasing trend is apparent across the different areas (28). Compared to 2016, more port managing bodies take measures to improve energy efficiency (90%), more port managing bodies take measures to reduce energy consumption (88%) and more port managing bodies monitor the energy consumption (79%).

Role in electricity provision

Electricity is a rising cost, even irrespective of rising energy prices, due to the digitalisation and electrification efforts across all sectors. 44% of the respondent port managing bodies are still electricity providers for the port area, directly or through a subsidiary company. 41% of port managing bodies are not allowed to sell electricity. In the cases where it is possible, it is mainly sold on a cost recovery basis. While 31% of respondent ports do not play any role in the provision of electricity in the port, other roles include selecting the electricity provider, monitoring the price of electricity, or ensuring the supply of electricity for the whole port.

Energy demand in and around ports

Urban nodes generally have a high energy demand, with onshore power supply (OPS) adding additional energy needs. This will only increase with the further electrification of industrial clusters in port areas (in compliance with the Paris Agreement goals). Accordingly, sufficient grid capacity must be available on the European level as well as on the local level, where grids providing clean or low-emission energy is a precondition for real CO2 reductions over the life cycle.

The necessary electrical power reserves can be difficult for ports to plan in terms of energy storage and adequate supply. The increasing development of onshore power supply installations—depending on the segment equipped and the numbers of plugs installed in the port—will lead to high demand peaks.

5. www.espo.be/publications/espo-environmental-report-2021

MORE OFTEN HOME OF INDUSTRIAL CLUSTERS

The main industry sectors in ports

Compared to 2016, an increasing number of port managing bodies host industrial plants. 73% (compared to 66% in 2016) of the respondents report that manufacturing or processing industrial plants are located in their port. The main industrial sectors in ports include ship building and repairing, chemical and energy-related industry, construction and steel industry, and food and fishing industry (29). These plants benefit from their location in a port for the import of raw material or for export of finished goods, avoiding unnecessary transport and shortening the transport leg. By creating synergies and clusters in the ports, even more advantages are generated across sectors, for instance energy availability, circular economy, etc.

The majority of industrial companies leases the port land from port managing body through lease agreements or mixed contracts (i.e. including works). The contracts of the port managing bodies with industrial companies are usually for a period of time between 5 to 30 years. Of those respondents working with public domain concessions, 64% of port managing bodies include environmental performance clauses in the contract.

The disruption of supply chains following the lockdowns and restrictions caused by the COVID-19 pandemic, has pushed some sectors to look for diversification of supply and activated the search for production sites nearby. European ports could become even more attractive for industrial players if the trend of re-shoring gains more momentum and becomes a long-term development.

Bottom-up engagement in circular economy

70% of the respondent port managing bodies have a circular economy strategy in place. The main drivers for advancing circular economy in the ports are the ports' own strategies (76%), policies (62%) and the industries (57%). The port managing bodies inhibit a very active role in the field of circular economy (30). The classic landlord function (79%) is surpassed by the role of facilitator (86%). Circular economy projects are currently mainly carried out in the waste and energy sectors.

(29)

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

(30)

ROLE OF PORT MANAGING BODY FOR CIRCULAR ECONOMY

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

EXAMPLE PORT OF VIGO – ML-STYLE PROJECT

The ML-Style project of the Port of Vigo aims to develop a comprehensive management system for waste from fishing ports (including food plastics, polystyrene boxes, disused gear and marine litter). This involves the installation of waste collection facilities and campaigns to communicate their work on waste collection to stakeholders and the local community. In addition, a study of potential innovative measures for the management, treatment and recovery of materials found in the marine environment will be carried out, seeking a commercial outlet for waste as raw materials for the manufacture of clothing and fashion accessories. bluegrowthvigo.eu/en/project/mlstyle-en

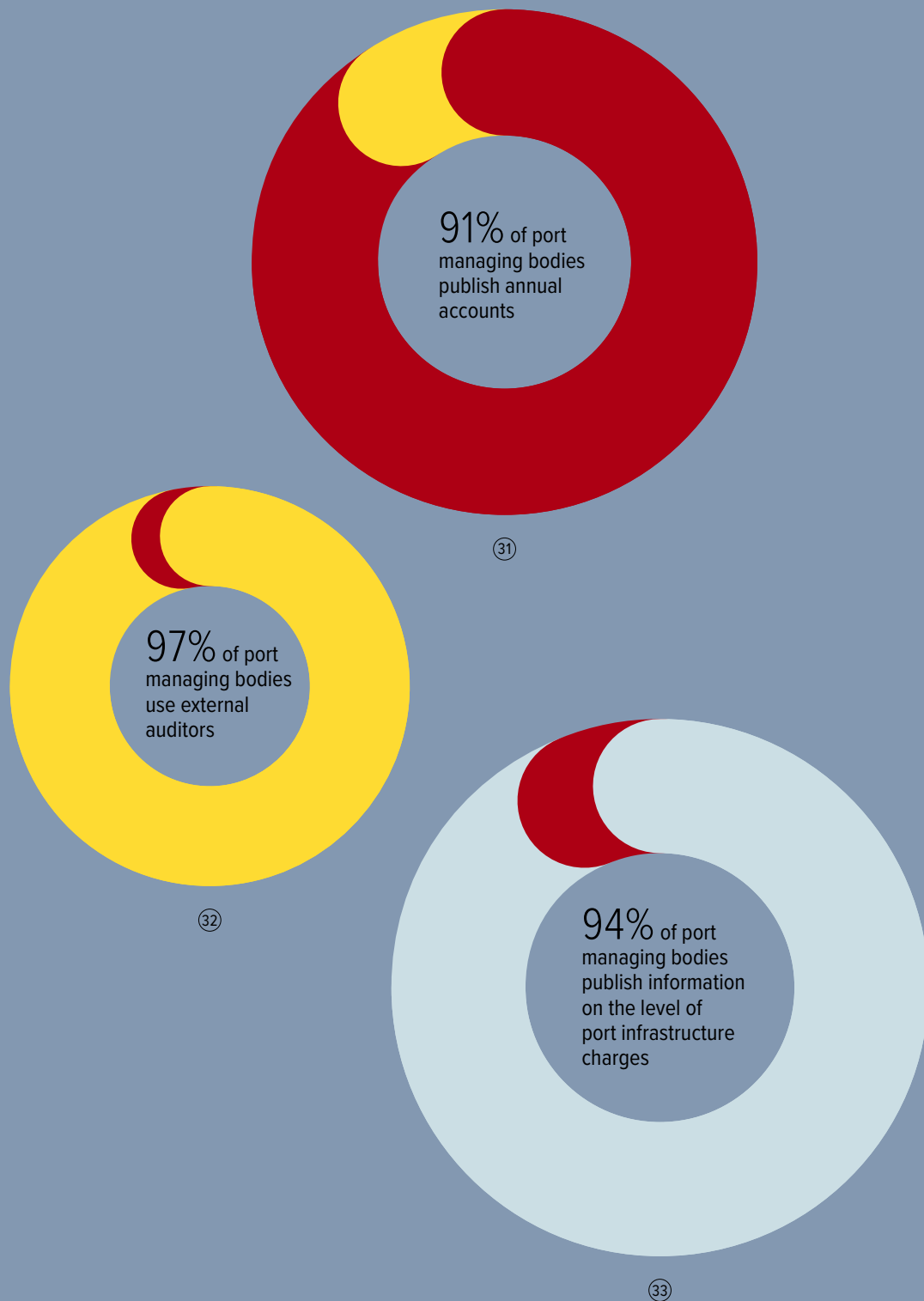


(29)



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

(30)



31 PUBLIC AVAILABILITY OF ANNUAL ACCOUNTS

91% Yes
9% No

32 ANNUAL ACCOUNTS ARE AUDITED BY AN EXTERNAL AUDITOR

97% Yes
3% No

33 PUBLIC AVAILABILITY OF THE PORT INFRASTRUCTURE CHARGES

94% Yes
6% No

TRANSPARENCY AND ACCOUNTABILITY

Transparency beyond financial reporting

Port managing bodies, similar to other public bodies and regular companies, are expected to demonstrate good governance principles. More than ever are transparency, openness and accountability to stakeholders and citizens publicly demanded. Transparency and accountability are not limited to financial reporting, but span a broad range of environmental, societal and social responsibilities. One example is the non-financial environmental reporting, that has established on the European level by the EU taxonomy⁶, which requires large financial and non-financial companies to report on the environmental performance of their assets and economic activities. The public demand for sustainable operations has increased significantly. In addition, the use of social media as news sources and for information sharing, has enabled larger scale citizen involvement and mobilisation. Addressing citizens' social and environmental concerns has become many ports' 'licence to operate'.

Financial transparency

The Port Services Regulation (EU) 2017/352 sets a European framework (applicable to TEN-T ports) for financial transparency of ports and underlines the importance of transparent port infrastructure charges. As regards financial reporting, the survey shows that 91% of European ports authorities make their annual accounts publicly available, which are in 97% of cases audited by an external auditor (31) & (32). In terms of port infrastructure charges, 94% of port managing bodies publish information on the level of the port infrastructure charges (33). The official charges are often available on the port managing bodies' website.

Environmental accountability

The ESPO 2021 Environmental Report demonstrates that ports are stepping up their environmental management, with improvements in the Environmental Management Index in 2021. Together with the ESPO Green Guide 2021, the report strengthens the long-standing efforts of European ports to monitor and address high priority environmental issues. Close to 40% of responding ports have become certified with the Port Environmental Review System (PERS). This is a significant increase compared to 2020, when 33% of ports had a PERS certificate.

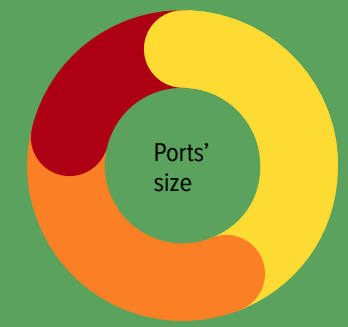
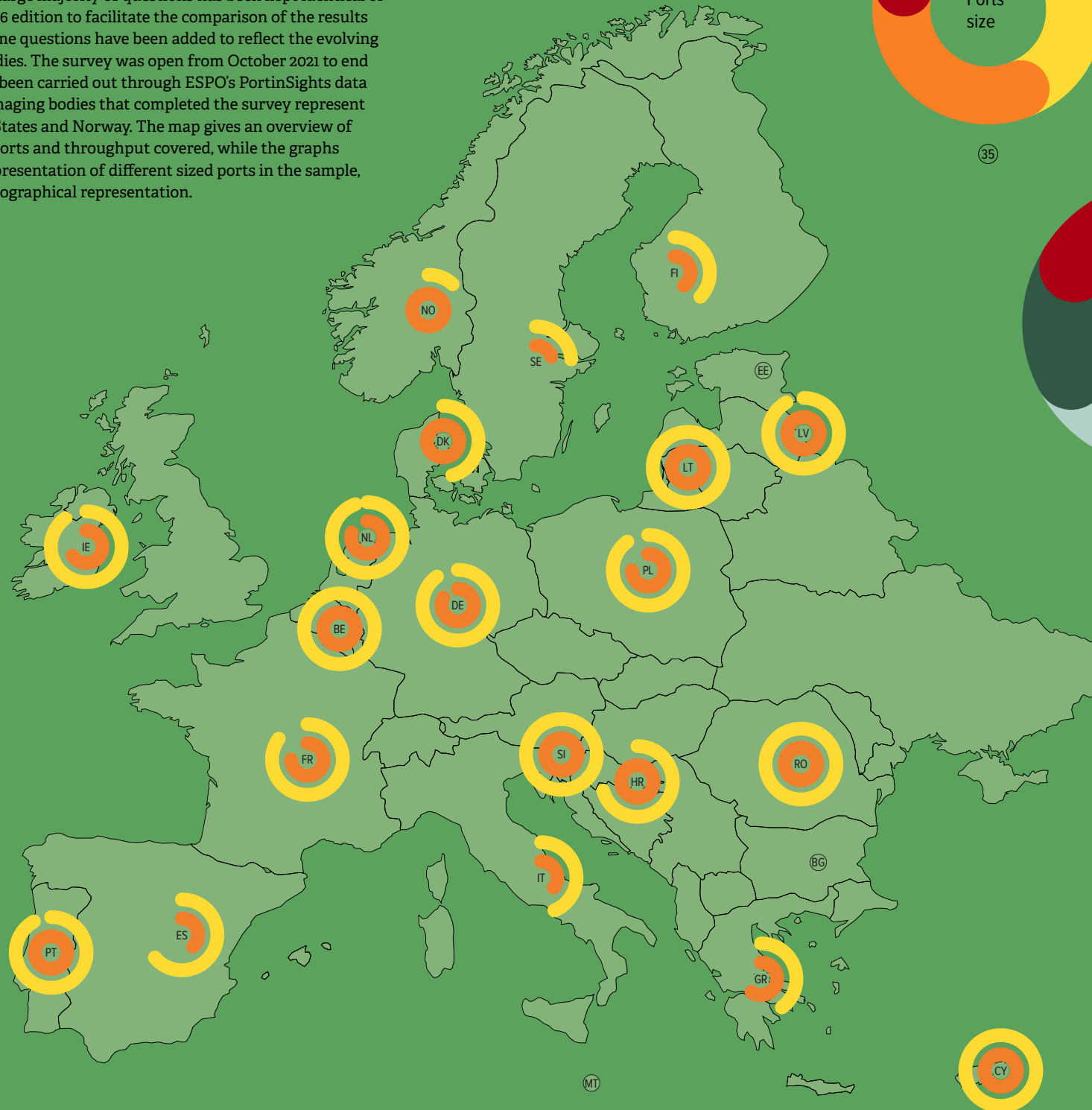
These trends are also recognised by the joint Deloitte ESPO study 'Europe's ports at the crossroads of transitions' from 2021⁷, which concluded that "transparency towards the wider ecosystem is of utmost importance for the sustainable growth of ports. Dissemination of the effect (both positive and negative) of port activities and the sharing of data and insights will increase the engagement of the surrounding communities. Port managing bodies can generate a competitive edge by being more transparent towards local communities (including the business community) on financial and sustainable actions".

6. (EU) 2020/852 Regulation on the establishment of a framework to facilitate sustainable investment

7. www.espo.be/news/joint-deloitte-espo-study-europes-ports-at-the-cro

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

The ESPO Port Governance Fact-Finding survey consists of 175 questions in 21 different sections. The large majority of questions has been kept identical or similar to those of the 2016 edition to facilitate the comparison of the results over time. In addition, some questions have been added to reflect the evolving role of port managing bodies. The survey was open from October 2021 to end of February 2022 and has been carried out through ESPO's PortinSights data platform. The 72 port managing bodies that completed the survey represent 20 different EU Member States and Norway. The map gives an overview of the share of TEN-T core ports and throughput covered, while the graphs demonstrate the good representation of different sized ports in the sample, as well as the balanced geographical representation.



- 34** **RESPONDENTS BY COUNTRY**
- Slovenia**
 ● 100% Tonnage
 ● 100% Core ports
- Belgium**
 ● 100% Tonnage
 ● 100% Core ports
- Poland**
 ● 90% Tonnage
 ● 75% Core ports
- Portugal**
 ● 92% Tonnage
 ● 100% Core ports
- Netherlands**
 ● 97% Tonnage
 ● 80% Core ports
- Latvia**
 ● 91% Tonnage
 ● 100% Core ports
- Romania**
 ● 100% Tonnage
 ● 100% Core ports
- Germany**
 ● 88% Tonnage
 ● 83% Core ports
- Spain**
 ● 64% Tonnage
 ● 38% Core ports
- France**
 ● 85% Tonnage
 ● 75% Core ports
- Ireland**
 ● 90% Tonnage
 ● 66% Core ports
- Sweden**
 ● 24% Tonnage
 ● 20% Core ports
- Croatia**
 ● 71% Tonnage
 ● 100% Core ports
- Finland**
 ● 37% Tonnage
 ● 40% Core ports
- Norway**
 ● 12% Tonnage
 ● 100% Core ports
- Italy**
 ● 44% Tonnage
 ● 36% Core ports
- Greece**
 ● 40% Tonnage
 ● 60% Core ports
- Denmark**
 ● 46% Tonnage
 ● 100% Core ports
- Cyprus**
 ● 100% Tonnage
 ● 100% Core ports
- Lithuania**
 ● 100% Tonnage
 ● 100% Core ports
- Bulgaria**
 ● 0% Tonnage
 ● 0% Core ports
- Estonia**
 ● 0% Tonnage
 ● 0% Core ports
- Malta**
 ● 0% Tonnage
 ● 0% Core ports
- 35** **DIFFERENTIATION OF RESPONDENTS ACCORDING TO SIZE (IN MILLION TONNES)**
- 44% 0 – 10
- 35% +10 – 50
- 21% +50
- 36** **DIFFERENTIATION ACCORDING TO REGION**
- 24% North Sea
- 24% Baltic Sea
- 20% Atlantic
- 17% Western Mediterranean
- 13% Eastern Mediterranean
- 3% Black Sea



EUROPEAN SEA PORTS ORGANISATION is the principal interface between European seaports and the institutions of the European Union and its policy makers. It represents the port authorities, port associations and port administrations of the seaports of the Member States of the European Union and Norway at EU political level. ESPO also has observer members in Albania, Iceland, Israel, Montenegro, the United Kingdom and Ukraine.

In addition to representing the interests of European ports, ESPO is a knowledge network that brings together active professionals from the port sector and national port organisations. Through various bottom-up initiatives, ESPO supports significant improvements in the port sector in the key fields of environmental management, social integration, reporting of key performance data, and cruise and passenger issues. As a knowledge network, ESPO also produces this 'Fact-Finding Report', which identifies the ongoing trends in EU ports' governance.

