



SHORT SEA SHIPPING  
Ufficio di promozione - Italia

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# THE EUROPEAN SHORT SEA SHIPPING NETWORK

## SHORT SEA SHIPPING: CHALLENGES AND OPPORTUNITIES TOWARDS 2027

29<sup>th</sup> September 2022

Presentation of the draft ESN Paper

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European Shortsea Network



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Irish Maritime  
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Shortsea  
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Short Sea Shipping  
TURKEY



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SHIPPING  
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2027  
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The background of the slide is an aerial photograph of Europe, showing the continent's topography and surrounding seas. The image is slightly faded and has a white, rounded rectangular overlay in the center where the text is placed.

# **1. THE EUROPEAN SHORTSEA SHIPPING NETWORK: PROMOTING SSS FOR 23 YEARS**

## THE ESN: PROMOTING SSS FOR 23 YEARS (1/2)

- ❑ Since the 90s the European Commission has issued **various regulations and activities aiming** at the promotion of SSS across Europe.
- ❑ **Shortsea Promotion Centers (SPCs)** were created in accordance with the EU Communication “Developing Short Sea Shipping in Europe: A Dynamic Alternative in a Sustainable Transport Chain”.
- ❑ The **first SPCs** was established in **Holland in 1997**, followed by Belgium, France, and then Finland.
- ❑ **Main goals of SPCs:**
  - ✓ Identify and analyze problems or obstacles that may affect the competitiveness of SSS.
  - ✓ Promote strategic alliances between operators in the transport chain with a multimodal perspective of short sea transportation.
  - ✓ Reinforcing the complementarity between maritime and land modes, particularly road transport, when setting the transport logistic chain.
  - ✓ Train operators on the possibilities and advantages of SSS.
  - ✓ Collect and provide information on available and potential services of SSS.
  - ✓ Provide reports and analysis to companies and public bodies.

## THE ESN: PROMOTING SSS FOR 23 YEARS (2/2)

- Currently, **13 Short Sea Shipping Promotion Centers** operate under the **European Short Sea Shipping Network (ESN)** with the goal of **coordinating their activities at EU level** and **promoting SSS** through the engagement of **stakeholders**.



Source: ESN elaboration, 2022



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## **2. ESN PROGRAM OF WORK FOR 2022 UNDER ITALIAN PRESIDENCY**



## ESN PROGRAM OF WORK FOR 2022 UNDER ITALIAN PRESIDENCY

1

“The importance of eco-incentives for SSS and the maritime sector” (25<sup>th</sup> May 2022)

2

“Digitalization and environmental sustainability as drivers in the change of Short Sea Shipping”  
(25<sup>th</sup> July 2022)



3

Elaboration and presentation of a first draft of the ESN Paper during the ESN Conference (Naples, 29<sup>th</sup> September 2022)



4

The first draft of the ESN Paper is available for download on the ESN website <https://europeanshortsea.com/> in order to carry out a Public Consultation before being shared with the competent EU institutions (December 2022)



## 3. EU SHORT SEA SHIPPING IN A NUTSHELL

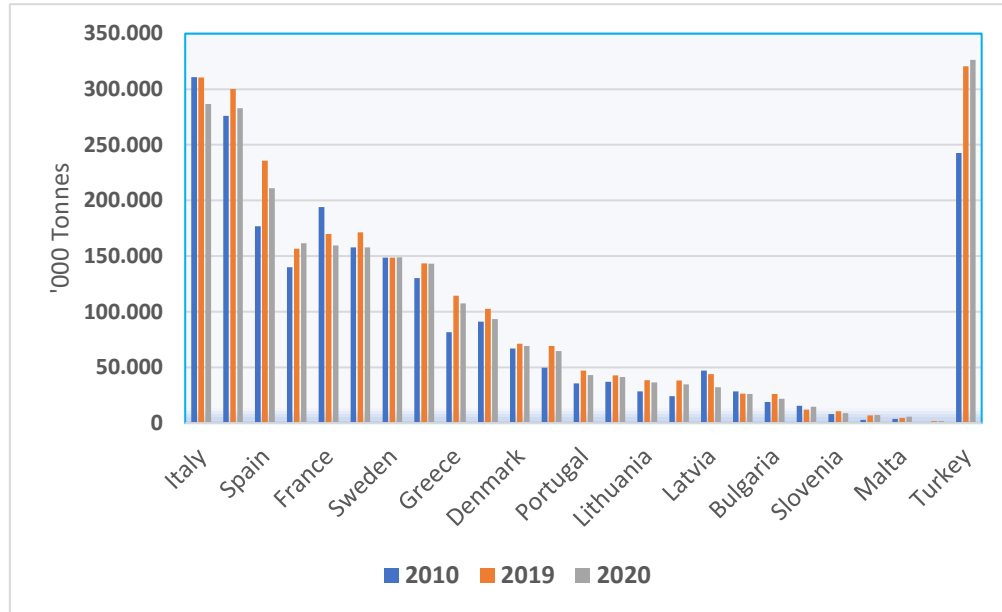


## EU SHORT SEA SHIPPING IN A NUTSHELL (1/3)

- ❑ In the context of **European Union transport statistics SSS** is defined as maritime transport of goods between ports in the EU on one hand, and ports situated in geographical Europe, on the Mediterranean, Black Seas, Baltic Sea areas and European Economic Area maritime countries (Iceland and Norway) on the other hand.
- ❑ **EU geography is favorable to the development of SSS.** With more than 67,000 km of coastline, very few industrial centers are located more than 400 km from a seaport. In addition, the EU has some 25,000 km of navigable rivers and canals.
- ❑ In the analysis of traffic flow carried out, **Eurostat data** has been used based on the actual number of tons handled. However, **the distance over which freight is transported should be considered as well in order to fully understand the transport phenomena.** The value of ton\*km is far too difficult and costly to calculate.
- ❑ The ESN Paper uses the value of tons, which, to a certain extent, penalizes the data on SSS freight traffic.

## EU SHORT SEA SHIPPING IN A NUTSHELL (2/3)

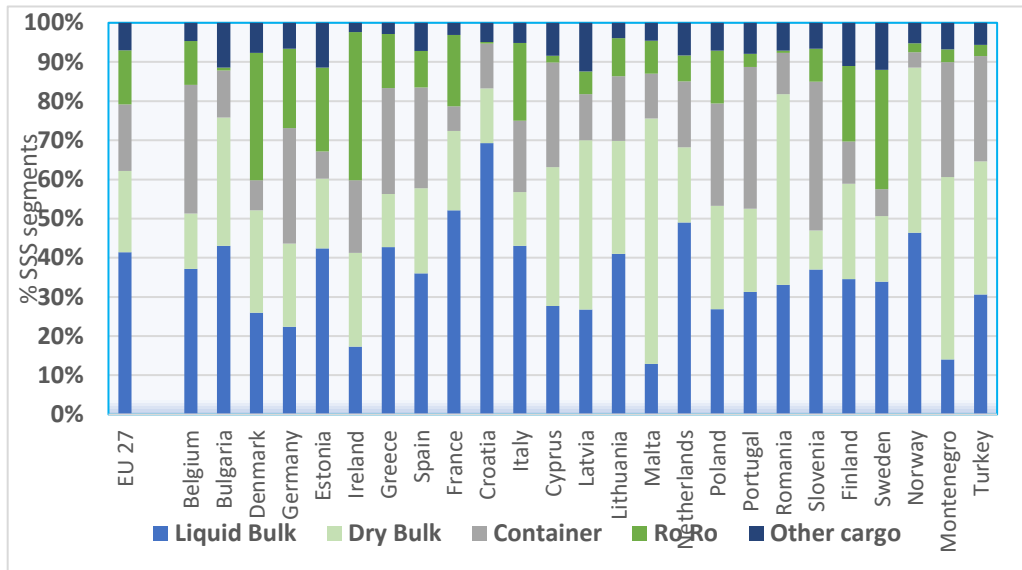
- The following figure shows the number of tons handled by SSS in Europe in 2010, 2019 and 2020.



Source: ESN elaboration on Eurostat data

### EU SHORT SEA SHIPPING IN A NUTSHELL (3/3)

□ The following figure shows the short sea shipping of freight by type of cargo in 2020



Source: ESN elaboration on Eurostat data



# **4. THE STRATEGIC ROLE OF SHORT SEA SHIPPING IN THE FRAMEWORK OF THE EU POLICIES**

### THE STRATEGIC ROLE OF SHORT SEA SHIPPING IN THE FRAMEWORK OF THE EU POLICIES (1/2)

- ❑ **In the framework of the EU policies, SSS has a strategic role because of its modularity and flexibility.**
- ❑ **The Paris Agreement (2015)** is a legally binding international treaty on climate change.
- ❑ **The European Green Deal (2019).** Main objective: to achieve carbon neutrality within 2050 by developing sustainable industry and sustainable transportation.
- ❑ **Sustainable and Smart Mobility Strategy (2020) and its Action Plan.** Main objective: to lay how the EU transport system can achieve its green and digital transformation and become more resilient to future crises.
- ❑ **The European Climate Law (Reg. (EU) 2021/1119).** Main objective: to enforce the Green Deal and to identify the intermediate target of reducing net greenhouse gas emissions by at least 55% by 2030, compared to 1990 levels.
- ❑ **The FIT for 55 package.** A set of proposals to revise and update the EU legislation and to put in place new initiatives. Main objective: to ensure that EU policies are in line with the climate goals (across several policy areas, such as **environment**, energy, **transport** and economic and financial affairs).





### THE STRATEGIC ROLE OF SHORT SEA SHIPPING IN THE FRAMEWORK OF THE EU POLICIES (2/2)

- ❑ The digital transition is becoming increasingly important for all sectors and transport in particular.
- ❑ **Digital Strategy for 2020-2025** (2020). Main goal: how the EU intends to position Europe as a leader in the digital world with respect to data and how technology will be used to meet climate-neutrality objectives.
- ❑ **Digital Compass for the EU's digital decade** (2021) based on four cardinal points:
  1. Skills
  2. **Secure and sustainable digital infrastructures**
  3. Digital transformation of businesses
  4. Digitalisation of public services
- ❑ **Digital Strategy** (2022) has been adopted by the European Commission (C(2022) 4388 final) including a **new vision**, addressing digital transformation opportunities of a **post-pandemic scenario**, and supporting the delivery of the EU's strategic priorities by 2030.

A satellite-style map of Europe and its surrounding regions, including parts of North Africa and the Middle East. The map shows terrain, water bodies, and coastlines. A semi-transparent white rounded rectangle is overlaid on the map, containing the main title text.

# **5. ECO-INCENTIVE SCHEMES AND DIGITAL SOLUTIONS FOR THE DEVELOPMENT OF MULTIMODAL MARITIME TRANSPORT**

## ECO-INCENTIVE SCHEMES AND DIGITAL SOLUTIONS FOR THE DEVELOPMENT OF MULTIMODAL MARITIME TRANSPORT

- The demands on shipowners for the decarbonization and digitalization of the maritime sector are increasingly costly.
- Eco incentive schemes play an important role in supporting new investments.
- To incentive sustainable intermodal transport and to avoid losing competitiveness and to be protected from inflation.
- Eco-incentive measures are proposed as a **new and complementary instrument**.
- Italian experience of **Ecobonus, Ferrobonus and Marebonus** as best practices.
- The Med Atlantic Ecobonus** project cofinanced by the CEF Programme (Spain, France, Italy and Portugal).
- New investments for technologies** for the upgrade of maritime services and the increase of the efficiency and competitiveness of the environmental solutions.
- Digital solutions** currently in use in the EU ports (i.e **Blockchain; Digital Twin; Drones**) boost the efficiency of port operations, safety and security.



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# 6. THE EUROPEAN FINANCING OPPORTUNITIES

## THE EUROPEAN FINANCING OPPORTUNITIES (1/2)

- The **Multiannual Financial Framework for 2021-2027** and **Next Generation EU** will be a great opportunity to create a wave of green investments.

**Single Market, Innovation and Digital**

149.5 (+ 11.5 from NGEU)

**Cohesion, Resilience and Values**

426.7 (+ 776.5 from NGEU)

**Natural Resources and Environment**

401 (+ 18.9 from NGEU)

**Migration and Border Management**

25.7

**Security and Defence**

14.9

**Neighbourhood and the World**

110.6

**European Public Administration**

82.5

**Total: €2.018 trillion**



Source: The EU's 2021-2027 long term budget and Next Generation EU



## THE EUROPEAN FINANCING OPPORTUNITIES (2/2)

- ❑ **NextGenerationEU (NGEU).** Temporary recovery instrument (806,9 billions euros) to support the economic recovery from the coronavirus pandemic and build a greener, more digital and more resilient future.
- ❑ **Recovery and Resilience Facility (RFF).** Key financial instrument of NGEU (723.8 billion euros) for providing grants and loans to support reforms and investments in the EU Member States.
- ❑ **National Recovery and Resilience Plans (NRRP).** Reforms and investment of each Member State in line with an agreed allocation key.



**NRRP**

- **37%** of budget of national plans to reach the **green deal objective**
- **30%** must be dedicated to **digital transition**



# 7. CHALLENGES AND OPPORTUNITIES TOWARDS 2027

## CHALLENGES AND OPPORTUNITIES TOWARDS 2027 (1/3)

- ❑ **SSS needs** to be given **greater attention** and **funding** within all EU transport policies **if the green transition is to be economically sustainable** for all transport actors and operators.
- ❑ Current **geopolitical crisis in Ukraine** has demonstrated that the **EU needs reliable energy sources and a flexible and modular transport system**. In order to achieve such system, it will be necessary to rely much more on seaborne transport rather than land transport.
- ❑ The green and **digital transition** of the transport **sector will have a significant cost and place a heavy burden on all transport operators**.
- ❑ **Eco incentives** should be designed to support both transitions and implemented with a view to incentivize **sustainable intermodal transport**, leading to supporting **new investments for technologies** that can upgrade maritime services.
- ❑ **Digital transition is becoming increasingly important** for all sectors.
- ❑ The **COVID-19 pandemic** highlighted not only how much we rely on our technology to be available to us, but also **how important it is for Europe not to be dependent on systems and solutions coming from other regions of the world**.

## CHALLENGES AND OPPORTUNITIES TOWARDS 2027 (2/3)

□ The ESN proposes the following recommendations:

1. Given the importance of promoting SSS, **the role of the ESN should be reinforced** with additional funding and a dedicated budget.
2. In order for the SSS sector to complete its green and digital transition an adequate financing will be needed, as illustrated in the Motorways of the Sea Detailed Implementation Plan. Moreover, this financing should enable an economically sustainable transition without allowing the sector to lose competitiveness and without inflationary pushes. In other words, **the green and digital transition must be economically viable for all transport operators.**
3. In order to have an economically sustainable green transition it will be necessary to **incentivize transport demand for the use of SSS.**

## CHALLENGES AND OPPORTUNITIES TOWARDS 2027 (3/3)

4. It is important **to invest in combined transport**, with particular reference to dedicated maritime connections, which are more flexible and modular as compared to their land counterparts.
5. The transport sector needs a **reliable and resilient plan for the supply of energy**, as demonstrated by the recent geopolitical crisis.
6. It is essential to **cooperate between Member States and with third countries** for the promotion of SSS. **The entity in charge of said promotion could be the ESN.**
7. The ESN contributes to the **sharing knowledge** in order to make transport solutions more sustainable and competitive, creating valuable meeting for **exchanging information between the industry and the market**, involving transport operators, shipowners, shipping lines, ports, and **cargo owners** and **contributing to training of new professional figures.**





## **8. PUBLIC CONSULTATION ON THE ESN PAPER**

## PUBLIC CONSULTATION ON THE ESN PAPER

THE FIRST DRAFT OF THE ESN PAPER IS AVAILABLE FOR DOWNLOAD  
ON THE ESN WEBSITE

<https://europeanshortsea.com/>

A Public Consultation is now open and will close on the 31st October 2022

Please send your contribution to: [info@europeanshortsea.com](mailto:info@europeanshortsea.com)

At the end of the public consultation the ESN Paper will be sent to the competent EU  
institutions



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Thank you for the attention!

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