



# FEPORT Manifesto 2024 – 2029

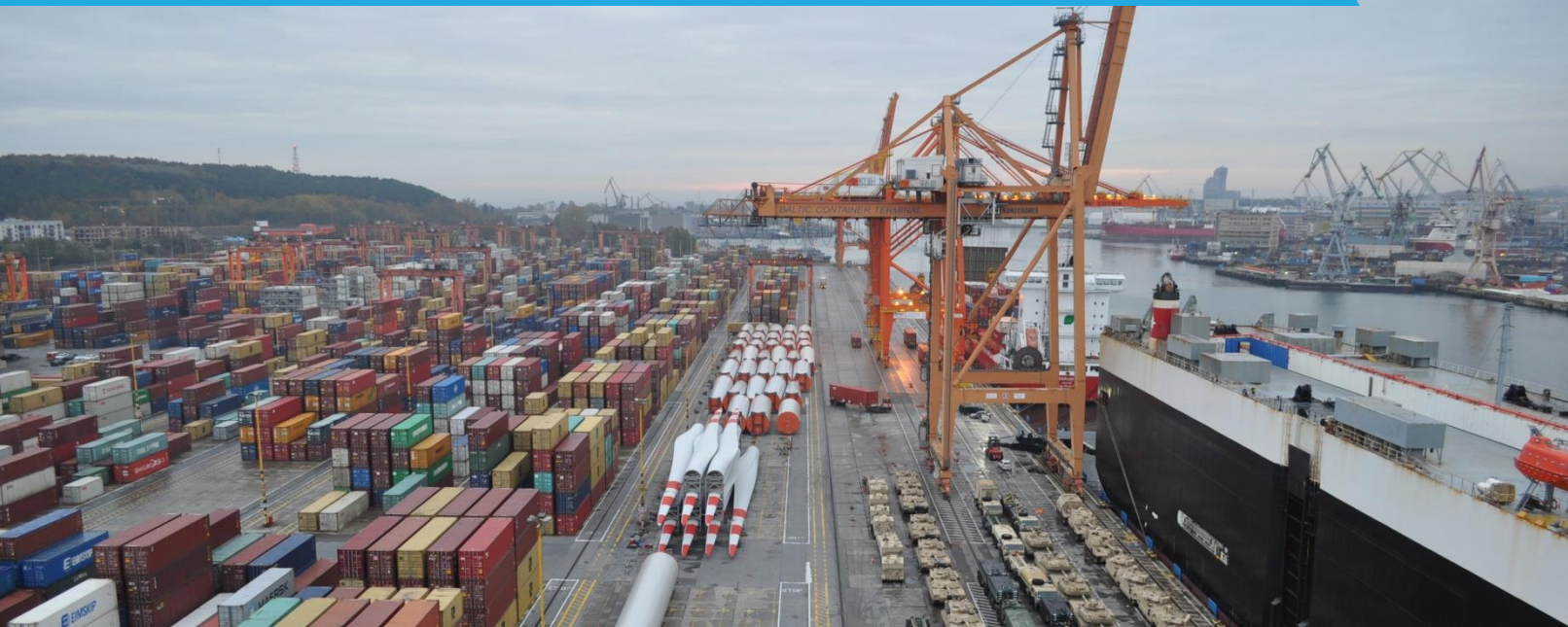
Terminal and seaport operators  
Resilient in a challenging world











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# Preamble

At the nexus of trade and commerce, European ports hold the pivotal responsibility of driving economic growth while mitigating risks in an increasingly interconnected world. Thus, understanding the dynamics of change and proactively responding to emerging trends are integral components of the enduring resilience of port operators.



European seaports which ensure Europe's seaborne foreign trade are currently undergoing drastic transformation processes. Developments like digitalisation, energy transition, safety and security obligations require tremendous efforts from all industries located in ports. These efforts contribute to the well-being of European citizens and to Europe as an international place for business and employment.

However, to ensure their competitiveness, resilience and the sustainability of their operations, Europe's port operators need policies that strengthen their position, allow them to compete internationally, facilitate the necessary transformation processes and enable them to reach global sustainability goals.

In an era marked by unpredictable geopolitical landscapes, climate-related disruptions, shifts in trade patterns and fast technological advancements, the resilience of port operators becomes paramount in sustaining the dual use of ports i.e. efficient civil and military operations.

FEPOR members handle all types of cargo, such as dry bulk, liquid bulk, cars, trucks, containers, break bulk and general cargo and operate passenger and cruise terminals. Their activities also include logistics and intermodal operations.

The European cargo handling industry is one of the most dynamic and competitive sectors in the EU. Imported and exported goods would not reach their final destination without efficient operations performed in the seaports of the EU. European private port companies and terminals are the lubricant of Europe's welfare.

In these turbulent times, challenges have been increasing for many industries including the maritime and port sectors. Energy crises and climate-related events are affecting the current way of doing business and new risks are emerging. Billions of euros of public and private investments will be needed to avoid disruptions in the maritime logistics chain and to adapt to physical risks such as the rise of sea levels or drying rivers.

Despite all these threats, port operators have to and will comply with the ambitious environmental objectives of the EU.

Transitional risks resulting from changes that need to be implemented to comply with new environmental regulations (e.g. Fit for 55 package) represent significant challenges for companies. Technological innovation also entails potential threats, such as cyber ones, that need to be dealt with. Finally, the exposure of European ports to criminal drug trafficking requires a strong European answer and continuous international cooperation.



Challenges as well as risks will not discourage private port companies and terminals from playing a pivotal role in modernizing European ports as long as the EU legal frameworks regarding investments including foreign direct ones are not constantly changing or are frequently questioned.





Over the past ten years, FEPORT members have massively invested in European ports thus contributing to their attractiveness and competitiveness. More than EUR 70 billion have been allocated to investments in superstructure, equipment, digitalization, cyber security, security, automation, training and upskilling, renewable energies, intermodal solutions etc.

This document is an invitation to a continuous dialogue with EU policy makers who will have the task to propose and adopt policies and legislation in the five coming years. We hope that competitiveness and resilience will be their priority. The collective ambition of FEPORT members is to continue to contribute to the attractiveness of European ports and their strategic role for EU economies and local communities.



We look forward to cooperating with the new elected Members of the European Parliament, the new Commissioners, and their staff.

# Executive Summary

European ports are in competition with other industries and with other ports in the world to attract investments. So, while the strategic nature of European ports as critical infrastructure is recognised, it is important that this specific status does not entail a lack of stability of the legal framework, among others regarding foreign investments. It is crucial that the EU adopts a consistent approach regarding all critical infrastructures and particularly those situated upstream and downstream ports. Vulnerabilities can also result from fragmented sectoral policies.



The competitiveness of European ports should not be sacrificed on the altar of over-regulation.

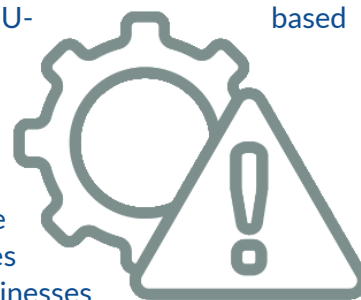
Reciprocity must become the cornerstone of the EU's commercial relationships with its foreign trading partners, in order to create partnerships that prevent protectionist measures and grant real access to markets. Support to the leadership of EU companies requires strategic thinking on how to formulate and/or adapt to trade and competition rules to allow them to remain competitive in a globalised world where protectionism is a growing trend.

The Green Deal and the Fit for 55 package represent an ambitious roadmap implying significant efforts in terms of compliance and incurred additional costs. The focus should now be on proper implementation instead of new rules.

It is also time that competitiveness and resilience of the maritime ecosystem is placed at the heart of the next EU Commission's roadmap. It is important to realize that in the absence of meaningful measures of support in favour of EU industries, many companies will lose points of competitiveness vis à vis their non-EU competitors.

The competitiveness of European ports will be challenged by changes in trade patterns or the incurred costs resulting from the entry into force of new regulations. Private port companies and terminals located in the EU will compete with operators performing operations in non-EU ports which are not concerned by pieces of legislation such as EU European Trading Scheme (ETS) for Maritime. The impact of this Directive on European ports has not been sufficiently assessed and will unfortunately lead to business leakage to the detriment of EU-based private port companies and terminals.

The EU should intensify its diplomatic efforts to obtain the adoption of a global scheme comparable to ETS for maritime at the International Maritime Organisation (IMO). Should this not be possible in the short term, it is crucial that the EU envisages the adjustment of its legislation that harms competitiveness and exposes EU ports to the detrimental effects of carbon leakage both on businesses and employment.



We also need mitigation measures now and not in two years' time. The competitiveness of European port stakeholders cannot be put at risk because some shipping lines will reorganize their rotations to avoid calling EU ports and paying ETS allowances. We hope the EU Commission will hear this call.



FEPORT members employ around 400 000 port workers who pay taxes in the EU and support its growth.

FEPORT represents 2290 private seaport companies and operators which perform cargo handling activities and a wide range of other logistics related operations in European ports. These are not ancillary services, but economic undertakings contributing to EU GDP. They continuously innovate their processes and invest in green equipment, digitalisation, artificial intelligence, energy transition, and the reskilling and upskilling of port workers.



Given that some players within the maritime logistics chain are providing door-to-door services including cargo handling, FEPORT calls upon EU regulators to ensure that support measures to one sector of the maritime logistics chain do not distort competition towards other players. We need a real level playing field.

Benefits for customers and efficiency gains should remain the key drivers of consolidation or vertical integration. State Aid schemes that grant a competitive advantage to some actors and not to others while both operate in the same market should be prohibited.

Global seaborne trade is of crucial importance to the EU and its Member States. Current EU regulations have not been sufficient to address the battle for global dominance between China and the USA/EU of seaborne trade. This is particularly also true regarding the use of state-of-the-art digital tools having anti-competitive features in the maritime sector. There is a serious legal vacuum.

In the coming years, EU competition law and trade policy should absolutely keep up with market and technology developments as well as with geopolitical shifts affecting trade and foreign investment policies.

## Main figures

Investment over the last ten years	EUR 70 billion*
Number of employees***	400 000*
Number of companies	2,290*
Throughput in tonnes – 2022	3.5 billion tonnes **
Throughput in TEUs – 2022	96 million TEUs **
EU Imports	€1 126 billion**
EU Exports	€1 300 billion**

\* Source: FEPORT members

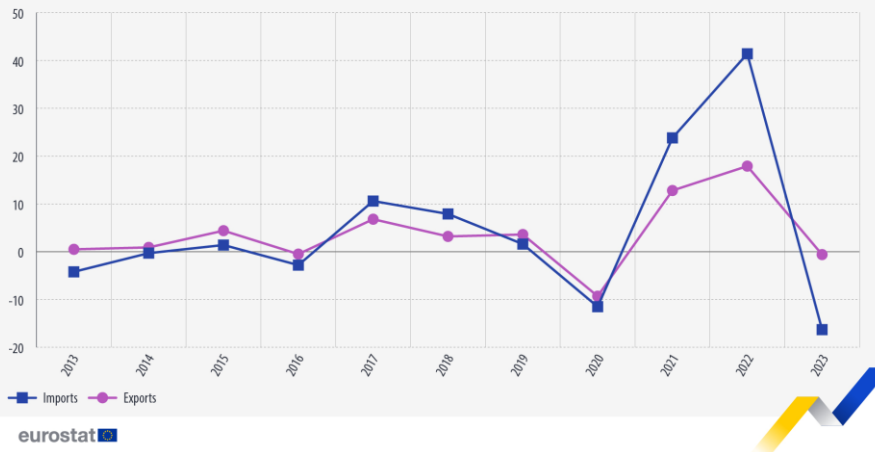
\*\* Source: [Eurostat](#)

\*\*\* Employees = work on docks, in logistics and for other port related industries

## EU trade in goods balance registered a surplus of €38 billion in 2023

### Extra-EU trade in goods, 2013-2023

(% year-on-year growth rate, based on trade value)

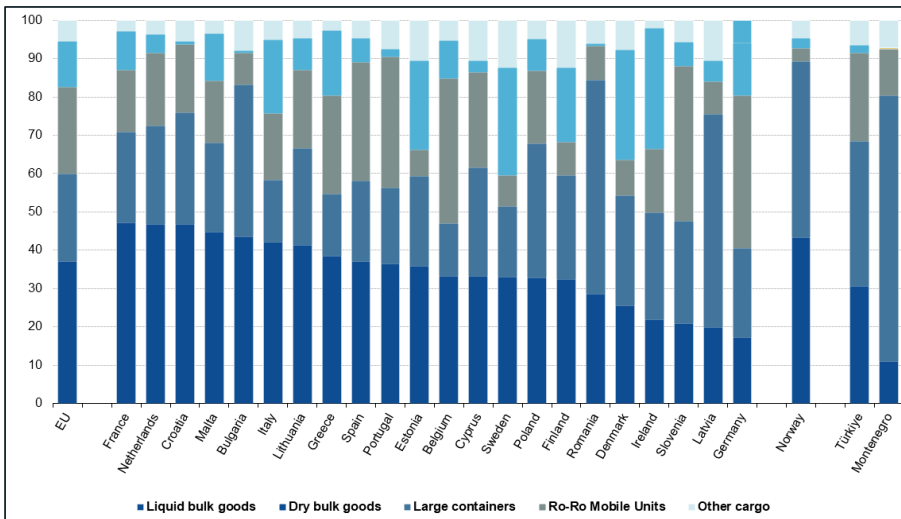


In 2020, EU trade was hit hard by the COVID-19 pandemic, with a significant fall observed for both exports (-9.3 %) and imports (-11.5 %) (see Figure). However, both recovered strongly in 2021 and 2022.

In 2023 compared with 2022, exports remained stable, but imports declined by 16 %, mainly due to falling prices of energy.

In 2023, the EU trade in goods balance registered a surplus of €38 billion. This marks a great contrast compared with 2022 when the EU reported a deficit of €436€ billion due to the high value of energy imports resulting from high prices for energy.

## Gross weight of seaborne freight handled in main ports by type of cargo, 2022

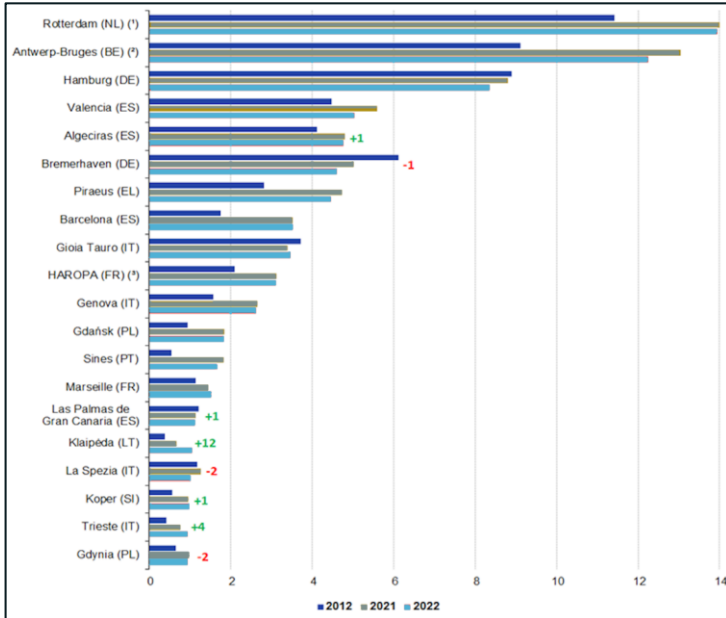


### Notes:

- Countries are ranked based on the share of liquid bulk goods.
- Main ports are ports handling more than one million tonnes of goods annually.
- Data for Iceland are not available.
- Source: Eurostat (online data code: mar\_mg\_am\_cwhc)



## Top 20 EU ports handling containers, 2012, 2021, and 2022

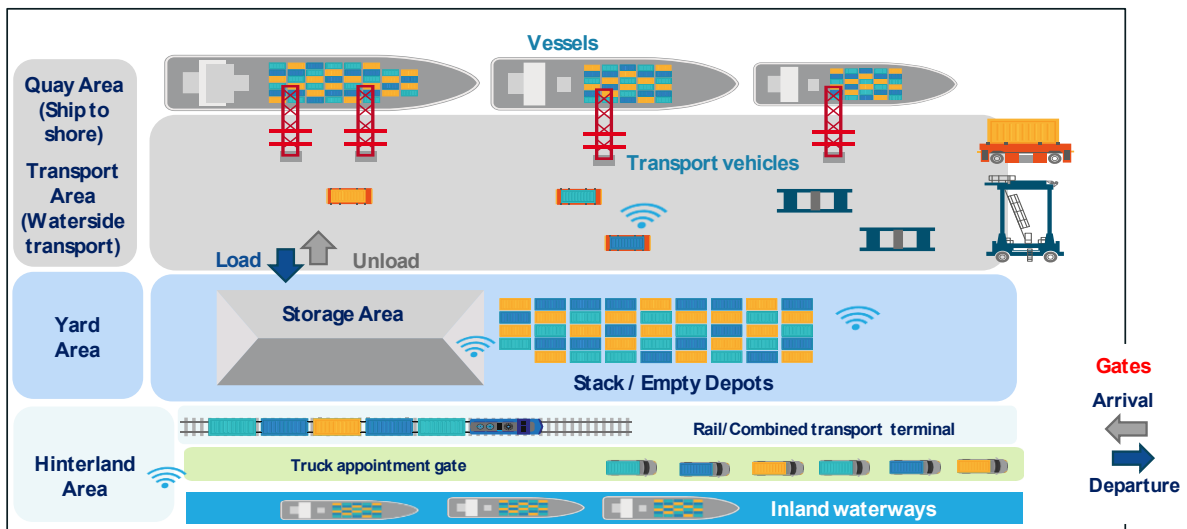


### Notes:

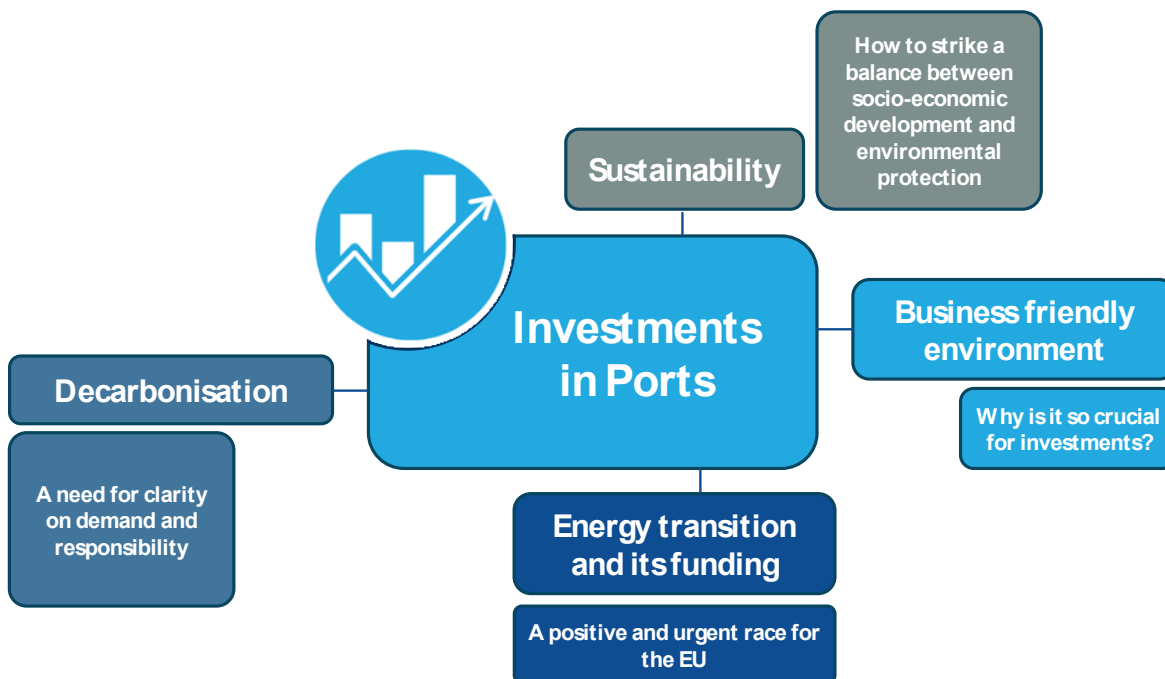
- Ports are ranked based on TEUs handled in 2022. TEU: Twenty-foot Equivalent Unit (unit of volume equivalent to a 20 foot ISO container). The number presented indicates the number of positions lost or gained compared to 2021. When no number is displayed, it means that the port maintained the same position compared to 2021.
- (1) Break in time series from 2021 due to methodological improvement in the data reported by the Netherlands.
- (2) Starting from 2022, the ports Antwerpen and Zeebrugge have been merged and the data are reported under the new port name Antwerp-Bruges.
- (3) Starting from 2022, the ports Le Havre and Rouen have been merged and the data are reported under the new port name HAROPA.
- Source: Eurostat (online data code: mar\_mg\_am\_pvh)

eurostat

## The diversity of operations at seaport terminals



# 1 Investments in Ports



## Business friendly environment: Why is it so crucial for investments?

Creating a business-friendly environment in ports is essential to attract private EU and international investors and to foster economic growth. Ports serve as crucial gateways for international trade and investment, and optimising their business environment can lead to a more dynamic European economy.

Therefore, implementing clear and transparent regulatory frameworks is crucial for attracting investment. Investors look for stability and predictability in regulations relating to port operations, Customs procedures, taxation, and environmental compliance.

A harmonised approach towards screening of international investments across all EU Member States would guarantee a level playing field in the internal market. Similarly, Foreign Direct Investment (FDI) screening mechanisms should ensure that all European critical infrastructures are subject to the same set of rules. Effective port governance structures, transparent decision-making processes, and efficient port management practices are also essential to attract private investment.





Well-managed ports with clear strategic objectives and customer-focused service delivery models are better positioned to attract investments and remain competitive in the global maritime industry.

Developing modern and efficient port infrastructure is vital for attracting private investments. This includes deepening draughts and dredging, expanding berths, upgrading cargo handling equipment, and improving intermodal transportation connections as well as ‘soft’ infrastructure such as port community systems.

Ports located in strategic geographic locations with access to large consumer markets and efficient transportation networks are more attractive to investors. Improving their multimodal connectivity and logistics infrastructure certainly drives EU and Foreign Direct Investment flows to ports.

Finally, simplifying and streamlining permitting processes for port development projects can reduce bureaucratic delays and encourage investment. Clear guidelines and efficient permit issuance procedures facilitate timely project implementation and reduce investor uncertainty.



## Recommendations



Port authorities can play a significant role as “business facilitators” in ports by maintaining a constructive dialogue with private investors in ports and avoiding being too prescriptive in contractual provisions regarding investments in superstructure.



Terminal operators should be in the “driver’s seat” when deciding about the type of equipment and commercial strategies.



Future public investments should focus on ports’ multimodal connectivity and the deployment of alternative fuels infrastructure.



EU and national policy makers must create a business-friendly framework with stable and transparent rules as well as healthy governance guidelines.



When planning investments, policy makers should always endeavour to ensure a good balance between environmental goals and economic needs.



A harmonized approach towards the screening of FDI is needed across all EU Member States to guarantee a level playing field within the internal market.

# Sustainability: How to strike a balance between socio-economic development and environmental protection

In the pursuit of sustainability, the European Union's ambitious emissions reduction targets have become a focal point for private port companies and terminals.

FEPURT members are actively investing into innovative solutions to minimise the impact of cargo handling operations on local neighbourhoods and marine ecosystems.

Millions of euros are directed toward sustainable equipment, with also an emphasis on employees' training for environmentally friendly operations. Collaboration with logistics chain partners also enables the reduction of the overall ecological footprint.

Although pollution from terminal operations contributes to less than 10% of total emissions in ports, terminal operators recognise the need for collective responsibility across the logistics chain.

The production of green energy is highlighted as a major societal challenge, and private port companies and terminals demonstrate a willingness to contribute by using clean, green fuel and investing in green energy sources such as wind turbines. Similarly, investments in digitalisation (IoT, automation etc) allows for an optimisation of port operations leading to a reduction of emissions.

Energy efficiency emerges as a key aspect in reducing total emissions, with terminals actively working to decrease energy requirements through innovative measures like green lighting and training courses for energy-efficient port equipment operation.



Terminal operators strongly support modal shift initiatives and the greening of port operations, leading to a notable reduction of air pollution.

They have taken concrete actions in terms of corporate social responsibility and are taking measures to minimize disturbances and nuisances of port operations (potential air and noise pollution, water quality issues etc.) on local communities and the environment. Good relationships between cities and port operators are crucial as many port workers are coming from neighbouring cities.

One important precondition for port connectivity - which is an essential enabler of modal shift - is dredging as the removal and relocation of sediments is needed to ensure the navigability of the inland waterways and the accessibility of ports.



## Recommendations



Prioritising the adoption of renewable energy and investment in green energy sources, such as wind turbines along with the widespread implementation of green technologies should remain a strategic goal.



It is crucial to prevent the delay or cancellation of dredging works which are key to maintain unhindered passage through the EU waterways and to guarantee access to ports.



Promoting sustainable transport solutions requires an enabling framework for low-emission modes of transport and multimodality.

## Decarbonisation: A need for clarity on demand and responsibility

The port sector plays a crucial role in Europe's decarbonisation efforts, holding a potential for substantial reductions in greenhouse gas emissions.

FEPOR fully endorses the EU Green Deal ambitions and the accompanying “Fit for 55” legislation.

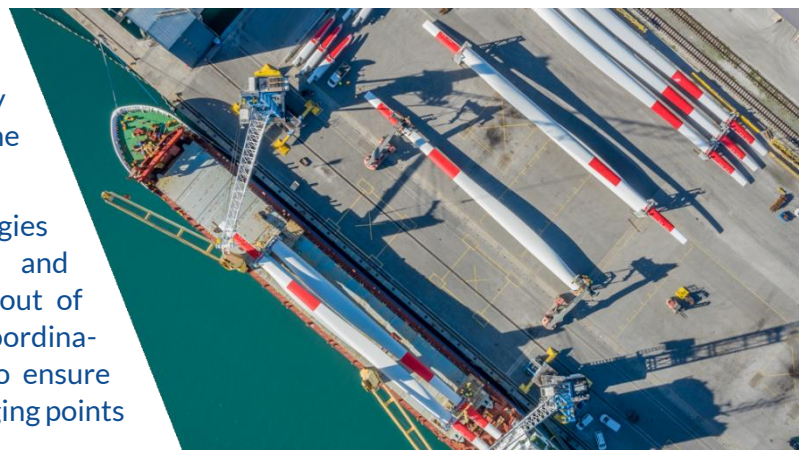
Terminal operators will be pivotal in bringing down port emissions through the greening of their equipment while enabling the decarbonisation of shipping through the provision of clean refuelling and recharging infrastructure in collaboration with Member States, port authorities and energy providers.

Ports can become real hubs for the supply and production of clean energy in Europe. They enable the use of offshore wind parks and the import of hydrogen.

However, transitioning to new technologies requires time, considerable investments, and collaboration across the value chain. The rollout of onshore power supply, for example, implies coordination between shipping companies and ports to ensure that the offered refuelling capacities and recharging points are used.

Real cooperation is needed between shipping companies and terminal operators regarding refuelling operations in general as those must be well coordinated to avoid the disruption of loading and unloading activities.

The Fit for 55 package specifically targets shipping by putting a carbon price on maritime emissions while laying down a pathway for the reduction of the GHG intensity of fuels used by ships.



The Alternative Fuels Infrastructure Regulation enables shipping to reach these targets by mandating ports to provide the needed green refuelling and recharging infrastructure.



This infrastructure is crucial for allowing the greening of shipping and ports, thereby bringing health benefits to port neighbouring populations through the reduction of harmful air pollution.

Although the societal benefits are evident, private investments cannot always be mobilized due to uncertainties regarding the business case of investments into green port infrastructure. Adequate public support, both through EU and national funds, is therefore crucial.

At the same time, a successful implementation of the Alternative Fuels Infrastructure Regulation cannot be achieved without a consistent approach. It is essential to recognize that investments into infrastructure remains a public task as diverging national policies can harm the level playing field between ports in the EU, thereby risking delays in the needed implementation of the Alternative Fuels Infrastructure Regulation (AFIR) targets.

## Recommendations



A lack of consistent implementation of AFIR and any other EU environmental legislation or a lack of clarity regarding the split of responsibilities between the public and private sector regarding the financing and deployment of alternative fuel infrastructure could jeopardize the level playing field between private port companies and terminals situated in different ports.



Ports and terminal operators play a crucial role in the import and production of clean energy. This role should be recognized in EU infrastructure related legislation such as the TEN-T Regulation and materialized through adequate transport and energy financing instruments.



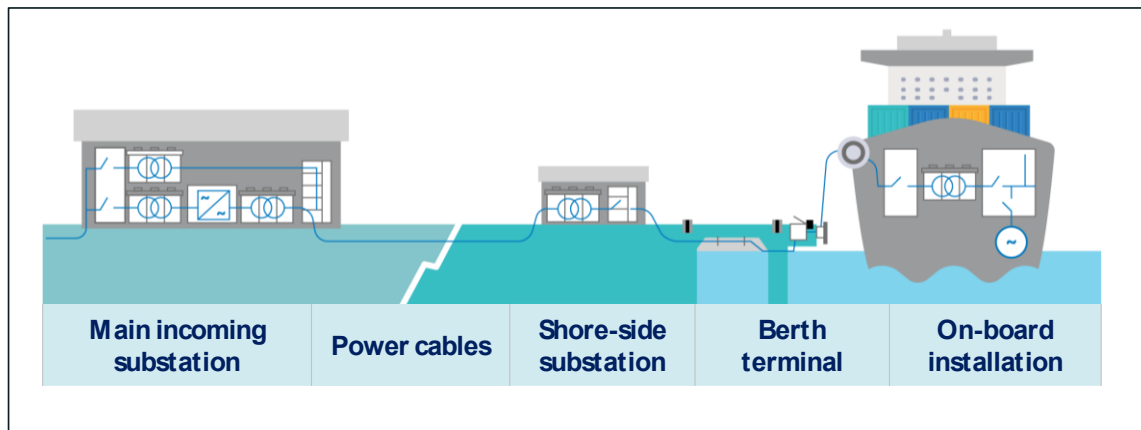
Terminal operators are ready to take steps towards the rollout of clean cargo handling equipment, but affordability and accessibility remain real obstacles. EU funding should help bridge this gap.



Permitting procedures, which can in general be very burdensome and complicated, need to be rethought to allow new activities in ports such as the storage of hydrogen and other types of fuels as well as the establishment of recharging points where needed.



## Onshore-to-ship power connection



## Energy transition and its funding: A positive and urgent race for the EU

EU ports are energy hubs. They ensure Europe's supply of energy sources obtained by sea transport. In addition, ports serve ships that use energy and use energy themselves.

For EU port operators, this means that they have to invest into new types of cargo handling equipment, provide new kinds of fuels to ships and must transform/upgrade their own equipment and operations.

Ports are increasingly integrating renewable energy sources like solar, wind, and hydro-electric power to meet their energy needs. Private port companies and terminals are replacing diesel-powered machinery and equipment with electric alternatives. This includes electric cranes, forklifts, and vehicles for transporting cargo within the port premises. Electrification helps reduce emissions and improve air quality in and around ports.

Ports are investing in alternative fuels such as liquefied natural gas (LNG), hydrogen, and biofuels to power ships.

Shore power, also known as cold ironing or alternative maritime power (AMP), is also deployed to enable ships to shut down their engines and connect to electrical power while docked at port. This reduces emissions from idling ships and helps improve air quality which in the case of port cities is very important.

Private port companies and terminals are implementing energy efficiency measures to optimise energy consumption. This includes improving lighting systems, optimising heating, ventilation, and air conditioning (HVAC) systems, and investing in energy-efficient technologies for cargo handling and logistics. Smart technologies play a crucial role in optimising port operations and energy management. IoT sensors, data analytics, and predictive modelling help companies to



monitor energy usage, identify areas for improvement, and make informed decisions to enhance efficiency and sustainability.



The recent crises have highlighted the crucial importance of developing an innovative and adaptable maritime transport sector.

It is indispensable to use EU funding to actively support investments in alternative fuels and infrastructure within ports.

This is not only in line with sustainability goals, but also responds to the clear public interest regarding the reduction of emissions from maritime transport.

The EU Innovation Fund will use revenues generated by the EU Emissions Trading System (ETS) to invest in Europe's green transition. 20 million Euros EU ETS allowances have been earmarked under the new EU ETS Directive for the maritime sector.

However, while the maritime and port sectors welcome the fact that waterborne transport projects are already eligible for funding, there is still a need to further finetune future calls including the upcoming dedicated maritime ones, to ensure that the specificities of the sector are properly addressed.

## Recommendations



The energy transition in ports requires collaboration among port authorities, shipping companies, terminal operators, and other stakeholders.



Governments should play their role by providing policy support, incentives, and funding to facilitate the adoption of clean energy technologies in ports.



Investments in infrastructure that enable synergies between transport, energy and digital should be prioritised.



To successfully achieve the decarbonisation goals of maritime transport, there is a need to have a 'Maritime Envelope within the Innovation Fund' that can finance disruptive technologies and stimulate the scale-up of existing solutions.

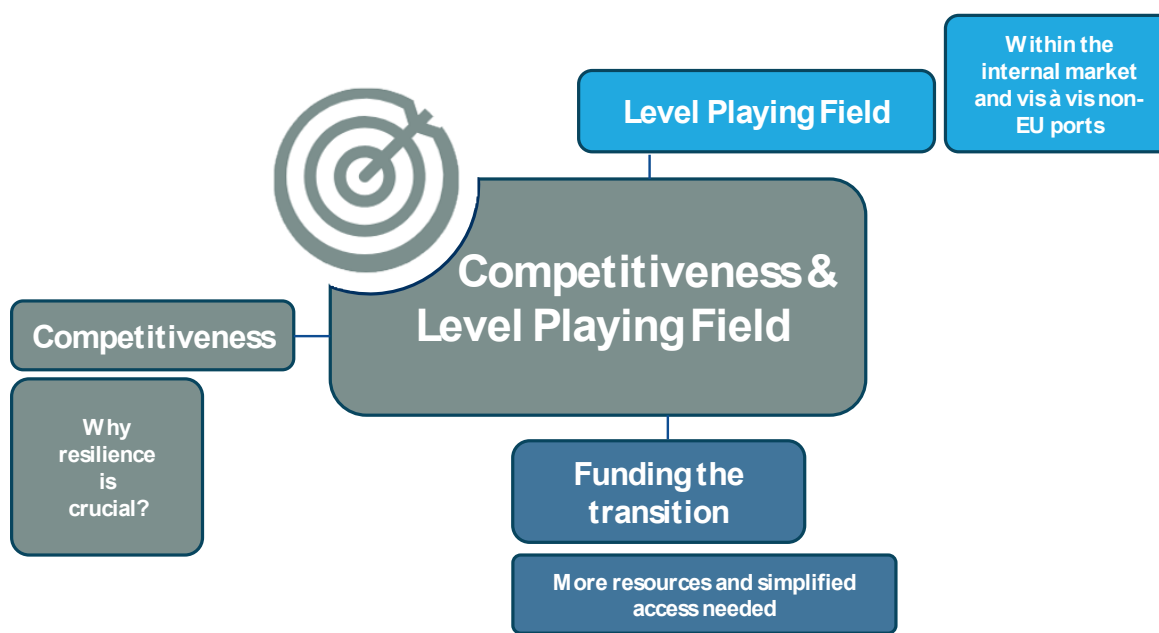


There is a need to allocate sufficient public funding for the deployment of alternative fuel infrastructure as investments into infrastructure remains a public task.



The future maritime calls of the EU Innovation Fund should include specificities that allow seaport operators to be eligible for funding.

## 2 Competitiveness & Level Playing Field



### Level Playing Field: Within the internal market and vis à vis non-EU ports

Regarding the concept of "port competition", a distinction must be made between different levels of competition, such as competition between companies within a port, competition between different terminal operators at different port locations, or competition between entire ports and even port regions such as the North Range and the ports of the Mediterranean.

Competition from companies that are already active within maritime logistics chains and are increasingly pushing into the core business of traditional port operations through takeovers or shareholdings should be explicitly taken into account.

Port operators need fair competitive conditions. This applies to taxation and state aid policy as well as to the implementation of environmental legislation. The EU has to make sure that its policy frameworks are fair and consistent. For example, it is high time that the exceptions to the EU State Aid rules applying to maritime transport (tonnage tax schemes that have been extended to cargo handling) are prohibited as they are distorting competition within the maritime logistics chain.

In maritime logistics, shipping companies, port companies, freight forwarders, etc. enter into various forms of cooperation with competitors – within the boundaries of applicable competition law.





Benefits for customers and efficiency gains should remain the key drivers of consolidation or vertical integration. State Aid schemes that grant a competitive advantage to some actors but not to others while both operate in the same market should be forbidden. There is a need for closer monitoring from the EU Competition regulator on what is happening in the market. The US is a good example for such monitoring.

The Federal Maritime Commission (“FMC”) and the U.S. Department of Justice’s (“DOJ”) Antitrust Division (the “Division”) share enforcement duties over the maritime transport market. The FMC monitors the effects of ocean carrier alliances on competition. It would be useful that DG Competition proceeds in a similar way.

Global seaborne trade is of crucial importance to the EU and its Member States. Current EU regulations have not been sufficient to address the battle for global dominance between China and the USA/EU of seaborne trade. This is particularly true regarding the use of state-of-the-art digital tools having anti-competitive features in the maritime sector. There is a serious legal vacuum.

In the coming years, EU competition law and trade policy should absolutely keep up with market and technology developments as well as with geopolitical shifts affecting trade and foreign investment policies.

Following the US approach and the qualified effects doctrine endorsed by the ECJ, the Commission should ensure that the definition of the relevant market under EU law takes into consideration these international developments. Equally, the Commission should be more committed to the application of the extra-territorial scope of EU antitrust law in relation to global seaborne trade, including monitoring the behaviour of shipping alliances in the global market when these produce effects in the EU’s territory.

The EU Commission should also ensure a more structured consultation process between DG COMP and DG CLIMA to agree on the legal tools required to address global competition aspects resulting from the adoption of environmental EU legislation in collaboration with National Competition Authorities and interested stakeholders.

Private port companies and terminals compete amongst themselves based on price, efficiency, reliability, and innovation. This competition allows port users to choose amongst a wide variety of options, thereby allowing for cost reductions and effective and reliable management of supply chains, which also benefits European consumers.



However, EU private port companies and terminals also compete with neighbouring non-EU competitors, which might be subject to less ambitious climate and environmental policies, or enjoy greater facilitations in terms of Customs procedures, state aid policies, freeports, etc.

The EU should therefore strive to convince IMO Member States to adopt a global solution laying down clear, uniform, and effective measures for the decarbonisation of shipping that mirrors the EU climate and environmental ambitions.

At regional level, transport infrastructure will certainly continue to play an important role under the Green Deals' external dimension.



The EU allocates a significant share of its cooperation budget to the transport sector through different modalities and for instance builds on the work of the EU Transport Task Force under the 2019 Africa-EU Alliance for Sustainable Investments and Jobs.

EU support for the transport sector for instance encompasses a wide variety of aspects and is geared to investments and asset management (roads, railways, urban infrastructure, ports, waterways, airports) as well as transport facilitation (connectivity, corridor management, platforms interface, logistics, etc.).

It is very important that strict conditionality criteria are applied when selecting projects to be financed by the European External Investment Plan. Those criteria should include the possibility to conclude partnership agreements with non-EU countries whereby schemes like ETS, but also other EU environmental legislation, are also adopted by third country beneficiaries.

The EU Commission should also avoid financing new port capacities outside the EU that directly compete with EU ports. Any EU external investments should follow strict conditionality criteria taking into account existing and upcoming EU capacities.

## Recommendations



The exceptions to the EU State Aid rules applying to maritime transport tonnage tax schemes that have been extended to cargo handling should be forbidden as they are distorting competition within the maritime logistics chain.



EU competition law and trade policy have kept up neither with market and technology developments nor with geopolitical shifts affecting trade and foreign investment policies. They should be thoroughly revised to ensure a level playing field.



An integrative instrument relying on a clear definition of relevant markets is needed. Such a definition must address the effects of anti-competitive behaviour instead of focussing on geographical scope. This would converge with the US approach and be effective internationally.



The EU Commission should ensure a more structured consultation process between DG COMP and DG CLIMA to agree on the legal tools required to address global competition aspects resulting from the adoption of environmental EU legislation in collaboration with National Competition Authorities and interested stakeholders.



The European Commission should closely monitor any possible changes in port traffic and investments at the expense of EU ports as a consequence of the implementation of ETS Maritime. Mitigation and/or compensation measures should already be agreed upon before any negative impact on EU ports is established.



Should the adoption of a global scheme not be possible at IMO, the EU should not exclude the possibility to adjust its rules to preserve the competitiveness of EU ports.



EU development aid to port projects located in neighbouring third countries competing with EU ports that operate in the same market should be avoided.



It is very important that strict conditionality criteria are applied when selecting projects to be financed by the European External Investment Plan. Those criteria should include the possibility to conclude partnership agreements with non-EU countries whereby schemes like ETS, but also other EU environmental legislation, are adopted by third country beneficiaries.



A close monitoring of the UK Freeport initiative is needed as it remains unclear how UK facilitation measures regarding Customs procedures, taxes and subsidies will affect EU ports and their competitiveness.



When designing the EU Customs reform, the impact on the business model for transshipment ports should be carefully considered.

## Competitiveness: Why resilience is crucial?

The resilience of European private port companies and terminals refers to their ability to endure and recover from various shocks, disruptions, and challenges while maintaining operations, ensuring continuity of supply chains, and supporting economic growth.

Through investment in cargo handling equipment designed to withstand environmental hazards and minimise damage during adverse weather conditions, private port companies enhance their resilience. Well-developed rail, road, and inland waterway connections do also reduce their dependence on any single mode of transport.

Similarly, European private port companies and terminals leverage digitalization, automation, and smart technologies to enhance their resilience and operational efficiency. Digital platforms, data analytics, and real-time monitoring systems enable them to anticipate disruptions, optimise operations, and respond rapidly to changing market conditions and emergencies.

Efficient and resilient cargo handling operations and streamlined logistics processes are essential to guarantee a high-level quality of service and quick turnaround times for vessels. The competitiveness of European ports is also influenced by various factors, including infrastructure,





efficiency, connectivity, regulatory frameworks, environmental sustainability and the overall resilience of the port ecosystem.

Modern and efficient port infrastructure, including berths and quays, is crucial for the competitiveness of European ports. Investment in infrastructure upgrades and expansion projects enhances port capacity, efficiency, resilience and attractiveness to shipping lines and cargo owners.

Ports with well-developed road, rail, and inland waterway connections facilitate efficient cargo movement and contribute to supply chain reliability and cost-effectiveness.

To improve the performance of rail infrastructure services in the single European railway area, it is important to identify performance deficiencies on the EU railway network. Infrastructure managers should set performance objectives in a way that considers the specificities of the network they manage.

The rail regulatory bodies should cooperate at Union level to ensure a coherent application of the regulatory framework and a consistent treatment of applicants across the single European railway area. This is particularly important for the good functioning of the TEN-T corridors.

Infrastructure managers and rail regulatory bodies, in cooperation with relevant stakeholders should strive to develop guidelines and the EU Commission should have the means to address regulatory inadequacies through implementing or delegated acts, where appropriate.

Terminal operators should be properly consulted regarding capacity planning on rail (freight networks) in order to prevent a mismatch between the allocation of train paths and terminal capacity. They should also be closely involved in the governance of the European Rail Transport Corridors.

Investment in the inland waterways sector will also be crucial. The challenges posed by the ageing fleet and workforce need to be addressed as should be the impact of the climate-related events which are already affecting river navigability.

Finally, transparent and predictable Customs procedures are enablers of the resilience of port operations and contribute to the competitiveness of ports.



## Recommendations



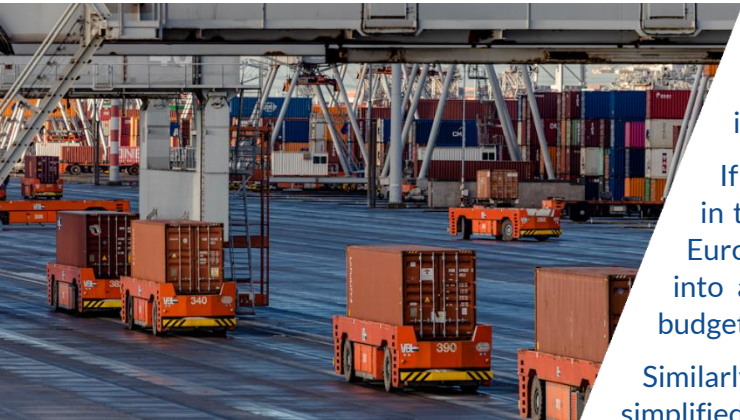
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Investment in the inland waterways sector will be crucial. The challenges posed by an ageing workforce need to be addressed as should be the impact of climate-related events which are already affecting river navigability.

# Funding the transition: More resources and simplified access needed

The EU's various existing funding programmes - Horizon Europe, Innovation Fund, Connected Europe Facility (CEF) - are very important but there is also a need for further simplification and adaptation of access to funding.



A robust EU funding instrument for transport is the best guarantee to deliver high EU added value, foster a level playing field across Europe and enable investments.

If the EU wants to strengthen its resilience, be a leader in the shift to net-zero and finally complete the Trans-European Transport Network, it must translate its vision into action and reflect these ambitions in the new EU budget for transport.

Similarly, Horizon Europe funding, which has recently been simplified and advertised through the organisation of events, can provide potential beneficiaries visibility towards investors interested in innovative projects they can deploy.

The establishment of a single funding point and the multiplication of national contact ones are good initiatives too. However, many companies (especially smaller ones) are not aware of all the available mechanisms (at the level of EIB, European Commission, Member States). There is a need to reach out to those smaller actors who can also play a significant role in terms of innovation.

Even if each programme and institution has its own rationale, improved coordination can help companies to better understand how the whole funding machinery works and how to benefit from EU support in a more efficient manner.

On the other hand, there is a need to adapt existing EU programmes and the EU State aid rules to the new international context as there are countries like the US which are announcing huge amounts of investments for instance in port cybersecurity. EU policy makers should remember that not only shipping but also the EU port industry is also exposed to new threats and challenges.



# Recommendations



A robust EU transport funding instrument for transport is the best guarantee to deliver high EU added value, foster a level playing field across Europe and enable investments.



To successfully achieve the decarbonisation goals of maritime transport, there is a need to have a 'maritime envelope within the Innovation Fund' that can finance disruptive technologies and allow for the scale up of existing solutions.



There is a need to allocate sufficient public funding for the deployment of alternative fuel infrastructure as investments into infrastructure remains a public task.

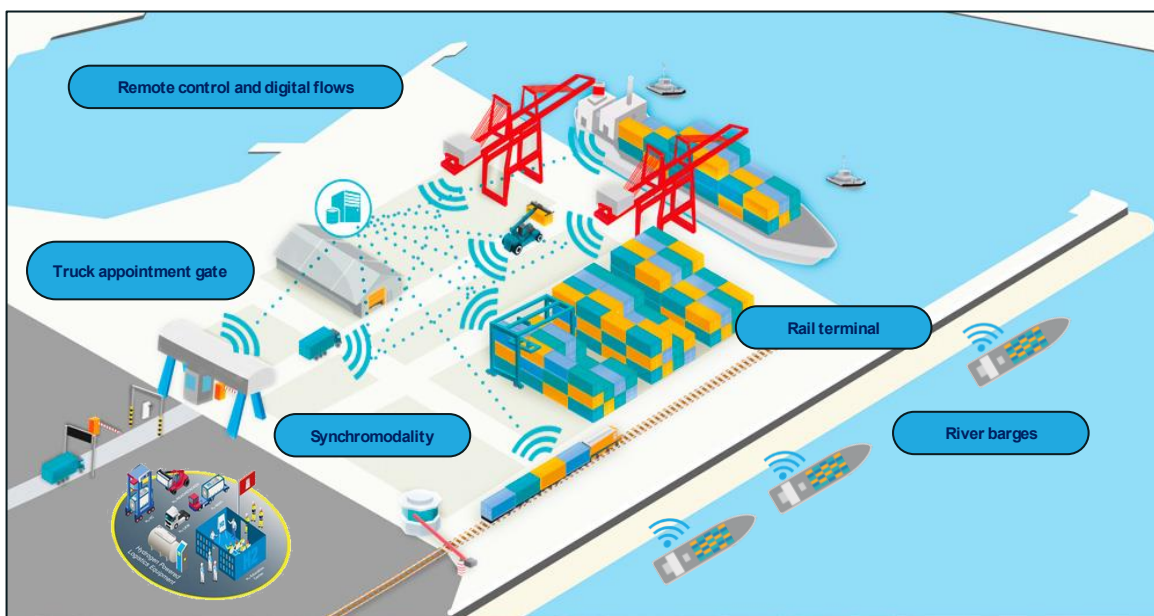


EU funding instruments should be leveraged to stimulate the uptake of green solutions to decarbonise port operations in cases where affordability and accessibility are still lagging behind.



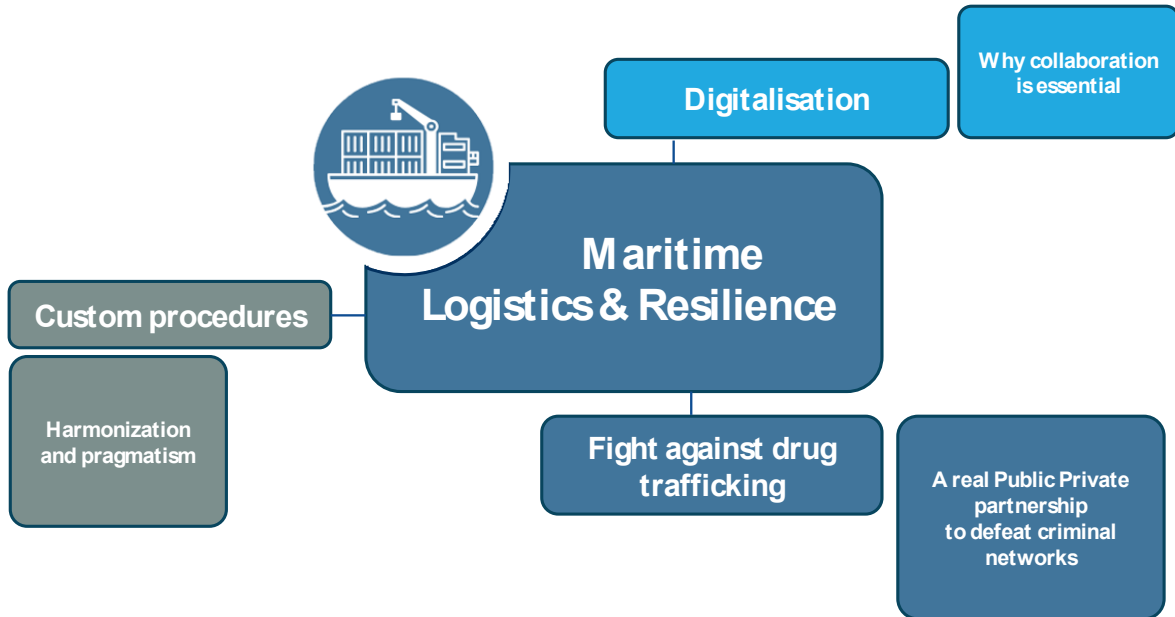
Simpler and less numerous funding programmes could make it easier for smaller companies to benefit from the available funds.

## Physical and digital multimodal connectivity at seaport terminals





# 3 Maritime Logistics & Resilience



## Digitalisation: Why collaboration is essential

Embracing new technologies, business models, and industry trends in terms of digitalisation and cargo solutions enable private port companies and terminals to adapt to changing market dynamics and maintain competitiveness in a rapidly evolving global landscape.

The maritime logistics sector is facing the challenges of the 4th industrial revolution, with digitalisation and automation at its forefront.



Port operators are heavily investing in Information and Communication Technology (ICT) infrastructure, thus entering into a new era of efficiency and innovation. This collective effort also concerns reskilling initiatives to prepare for the imminent structural changes in the labour market resulting from further automation.

Global container terminal operators and technology partners who are collaborating through TIC 4.0 (Terminal Industry Committee 4.0) are seeking to establish industry standards that enhance communication at the port-ship interface. This collaborative initiative promotes technical interaction between terminals and manufacturers, fostering the integration of cutting-edge technologies such as the Internet of Things (IoT) and Artificial Intelligence (AI) into port operations.

Terminal operators are actively working towards the rollout of the twin green and digital transition in ports, both through their individual actions but also by collaborating with other stakeholders.

Vessel call optimisation is one of the processes that allow enhanced collaboration and data-exchange between shipping companies and port operators ahead of a vessel's arrival to the port and allows for emission reductions at sea and onshore. Key to this process is maintaining vessel schedule reliability, a critical factor for successful optimisation.

Streamlining vessel calls will allow shipping companies to optimise their routes and vessel speed, thereby reducing fuel consumption and emissions. Port operators, through enhanced schedule reliability, will be able to increase terminal productivity and reduce the emissions of cargo handling equipment through improved yard planning.



## Recommendations

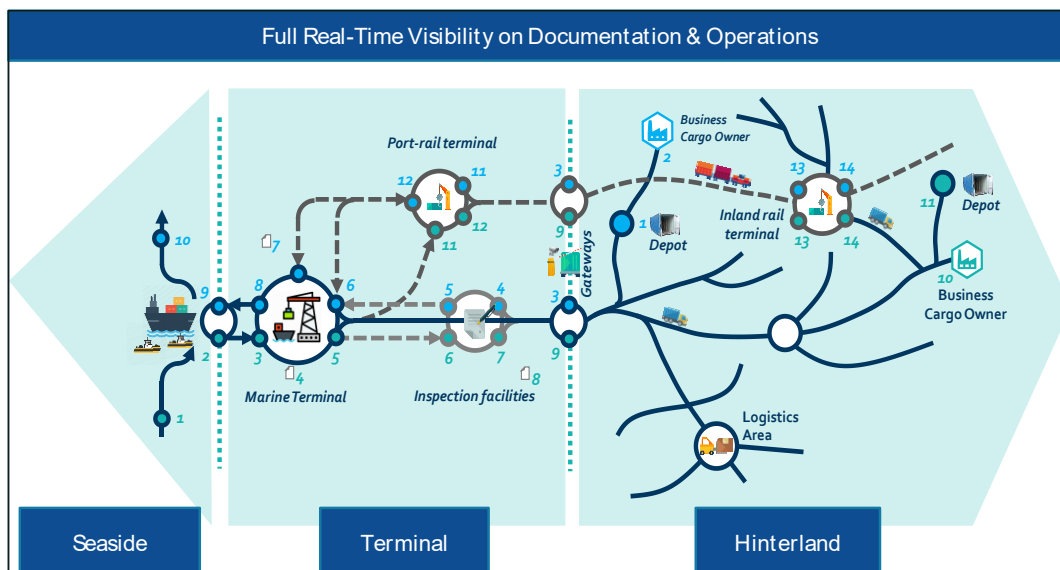


Terminal operators, individually and in collaboration with other stakeholders, are already delivering on digitalisation. Policy makers should therefore be careful when introducing new legislation, as an increasing administrative burden or prescriptive requirements would only hinder industry's innovative capacity.



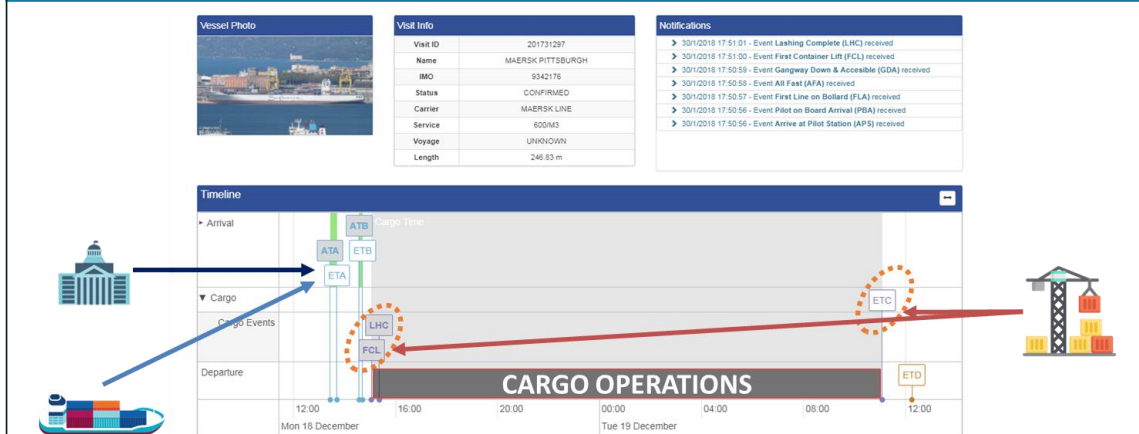
EU funding should support innovative digital solutions which contribute to further decarbonising the maritime logistics chain.

### Seamless and Sustainable Logistics



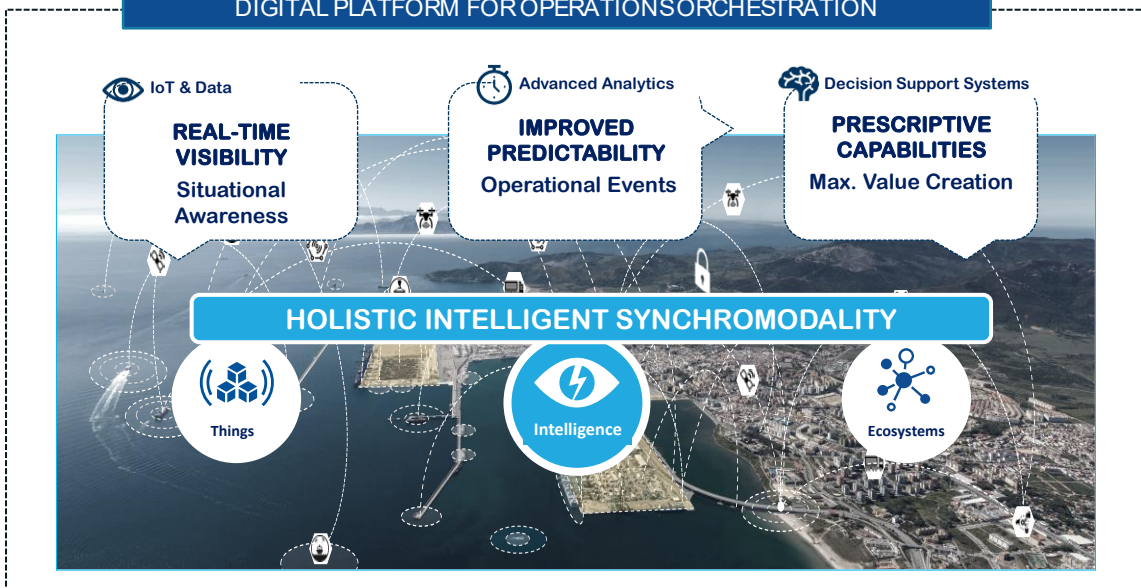
## Port Operations Coordination Centers

Timeline of **Estimated & Real Time Events** from different systems allow good berth planning and optimised vessel calls



## Seaport Terminal Digital Ambition

### DIGITAL PLATFORM FOR OPERATIONS ORCHESTRATION





# Customs procedures: Harmonisation and pragmatism

Applying Customs rules the same way in all EU Member States is essential for a fair competition between private port companies and terminals performing activities in different EU ports.

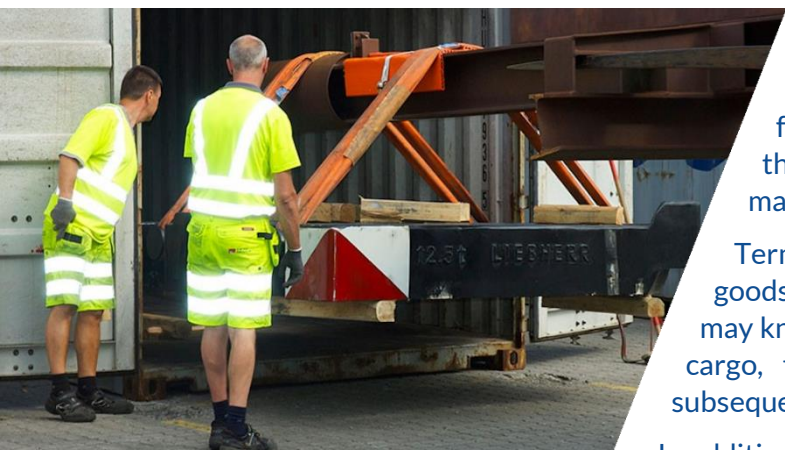
In Customs legislation, terminal operators usually take on the role of operators in charge of temporary storage facilities and in some cases Customs warehouse operators.

FEPOR members are therefore directly concerned by the proposed rules on temporary storage and Customs warehousing. It is crucial for them to have clear Customs rules that allow an efficient handling and storage of goods in ports.

Under the current Union Customs Code (UCC) regime, the time limit for temporary storage is set at 90 days. In the vast majority of cases, this period is sufficient.

In recent years, supply chains have faced recurrent external shocks such as those associated with the COVID-19 pandemic, the Shanghai lockdown, the Russian sanctions following the invasion of Ukraine and the Red Sea crisis. In some rare cases, these crises have resulted in the temporary storage period being exceeded.

Any drastic reduction of the time limit for temporary storage below 90 days will mean that, in many cases, terminal operators will become Customs warehouse operators, thus increasing their administrative costs as they will need to provide data which they cannot easily verify.



Terminal operators enter into contracts with shipping companies to handle cargoes and to that end, exchange information which is relevant for the handling of those goods i.e. the weight of the cargoes, whether they contain any hazardous materials and the ship's estimated time of arrival.

Terminal operators do not know the value of the goods or the name of the manufacturer, and, while they may know which second transport mode will pick up the cargo, they are most likely unaware of the goods' subsequent destination.

In addition, they do not have the means to verify such data, as in the case of containerised goods, boxes which are usually sealed cannot be opened. From a logistical point of view, it is very difficult not to say impossible to check the content of several thousands of containers discharged every day in EU ports.

## Recommendations



To ensure the resilience of supply chains, it is key to allow the storage of goods under a Customs warehouse procedure and under temporary storage at the same facilities.



Facilitation measures implemented during the COVID-19 pandemic which allowed economic operators to place goods under a Customs warehousing at facilities authorised for the temporary storage of goods should be maintained when designing the Customs Reform (provided that the time limit for temporary storage remains at 90 days).



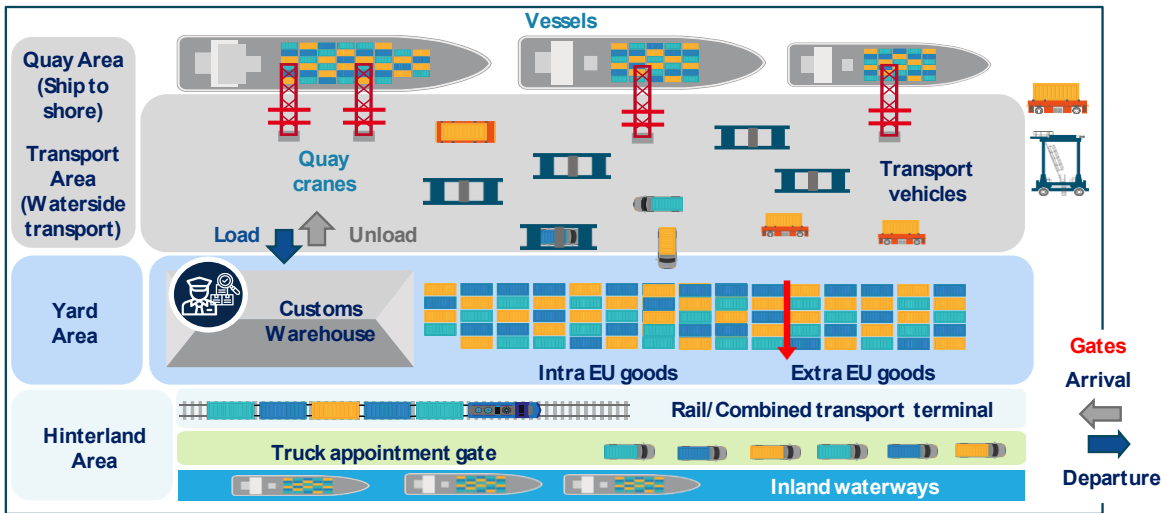
Data should only be requested from economic operators who have access to information as part of the normal course of their business and can therefore actually verify it.



When designing the EU Customs reform, the impact on the business model for transshipment should be carefully considered. This is especially relevant for the proposed rules on temporary storage given their impact on the fluidity of the logistics chain.



## Customs procedures at seaport terminals



### 1. Goods are imported to the EU



For import, the owner of the goods or his representative needs to lodge a declaration and Customs needs to review this before the goods can be released for free circulation.

Terminal operators do not have information about the content of a container. They just receive a message from Customs when the goods can be released and leave their premises. Until that moment, goods are in temporary storage.

When goods arrive to the port, it is not always immediately clear what is their subsequent destination and expected Customs procedure.

### 2. Goods are re-exported



In some cases, goods in temporary storage are re-exported and shipped to a country outside the EU. These goods are never placed under a Customs procedure in the EU.

These goods do not reach the EU market, but their handling and transshipment by terminal operators in the EU entails a significant amount of business activity and mobilizes a lot of workers. It is therefore crucial that Customs rule support port stakeholders' efforts to remain efficient and competitive.

Terminal operators sign contracts with shipping lines about the handling of these goods, but this process does not entail sharing information about the content of the shipment or the subsequent non-EU destination of the goods.



### 3. Goods are stored in a Customs warehouse



Customs Warehouse



In case of unclarity regarding the status of goods, subsequent Customs procedure and destination, traders can choose to store goods in a Customs warehouse where they can be kept for an unlimited period.

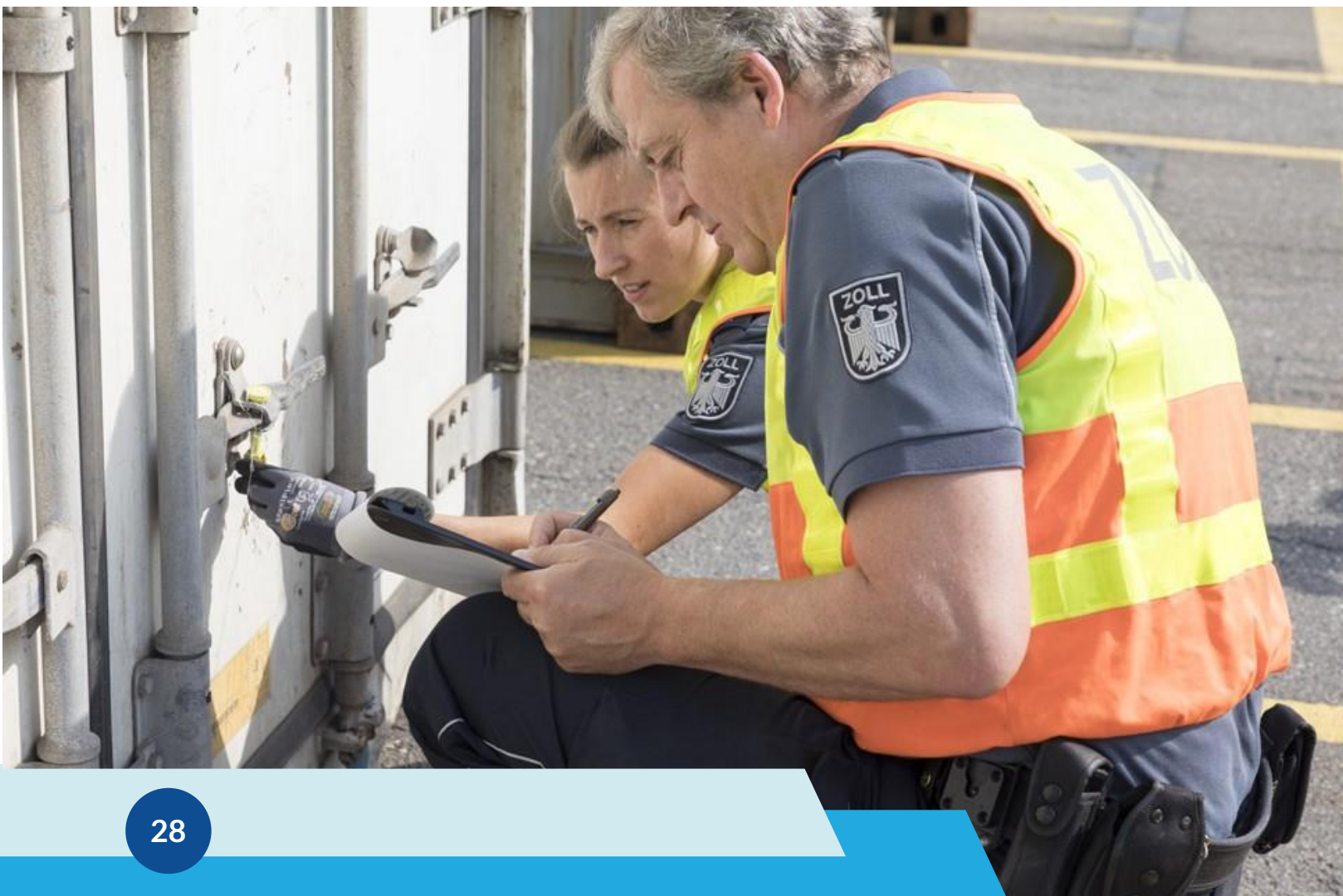
Operating a Customs warehouse entails a more significant administrative burden as Customs warehouse operators are subject to several verification and notification requirements when goods leave which do not apply to temporary storage.

Normally, goods in temporary storage and goods that are placed under a Customs warehousing procedure are stored in different areas in the port. Yet, situations exist where goods under different regimes are stored in the same facilities.

Temporary storage and Customs warehousing are two distinct procedures. Whereas goods need to leave temporary storage after 90 days, no time limits apply when goods are stored in a Customs warehouse. The two regimes also differ regarding the extent to which the goods can be handled and altered, with the Customs warehousing procedure allowing for significantly more flexibility.

FEPOR considers that both regimes have an important function in the seamless functioning and resilience of logistics chains and should therefore be maintained in EU Customs legislation.

2



## Fight against drug trafficking: A real Public Private partnership to defeat criminal networks

Drug trafficking is one of the most significant challenges the EU faces today as it poses threats to security, human health, and social cohesion. Drug seizures are hitting record levels as, despite the relentless efforts of law enforcement authorities, organised crime is capable of rapid adaptation to readjust its strategies and networks.

The growing threat of organized crime to society, including to port companies and their employees, is rightly recognised by the European Commission which adopted a road-map to boost the fight against drug trafficking and organised crime in October 2023.

Reversing this trend requires a holistic approach at the EU and (inter)national level which focuses on enhanced international cooperation, tackling organised crime's root causes, accompanied with targeted measures to prevent the criminal infiltration of logistics chains including ports.

Customs authorities play a crucial role in identifying "high risk" cargoes and performing effective controls. These controls are important from a law enforcement perspective but have a high operational impact on terminal operations and the fluidity of logistics chains.

The role of private port operators and terminals already extends beyond mere operational functions; they serve as frontline defenders implementing robust security protocols, cooperating with Customs authorities when inspectors perform their tasks at terminals.

By investing in state-of-the-art surveillance systems, and training personnel in recognising suspicious activities, private port operators have been contributing significantly to the overarching goal of disrupting drug trafficking networks and preventing the proliferation of narcotics.





## Recommendations



The Commission has understandably put the fight against drug trafficking and organised crime on the EU agenda, as drugs trade is indeed one of the most significant security threats faced by the EU today. However, the fight against drug trafficking can only be won if Customs controls are implemented in a harmonised way.



International cooperation, as well as close cooperation between private stakeholders, law enforcement authorities and Member States at EU level will be crucial.



The European Ports Alliance as a Public Private Partnership will be able to fight criminal networks if the private sector's role in ports is recognised and associated to the elaboration of the work plan.



The European Ports Alliance could recommend the conclusion by the EU/ Member States of Memoranda of Understanding or agreements with third country counterparts whereby ports in South America and Africa that would comply to strict requirements in terms of checks (fight against drug trafficking) would be certified and part of "secure trade lanes".



There are already a lot of ongoing public-private projects focusing on screening, intelligent cameras, virtual fences, port workers' identity checks, etc. Some of those measures could be replicated.

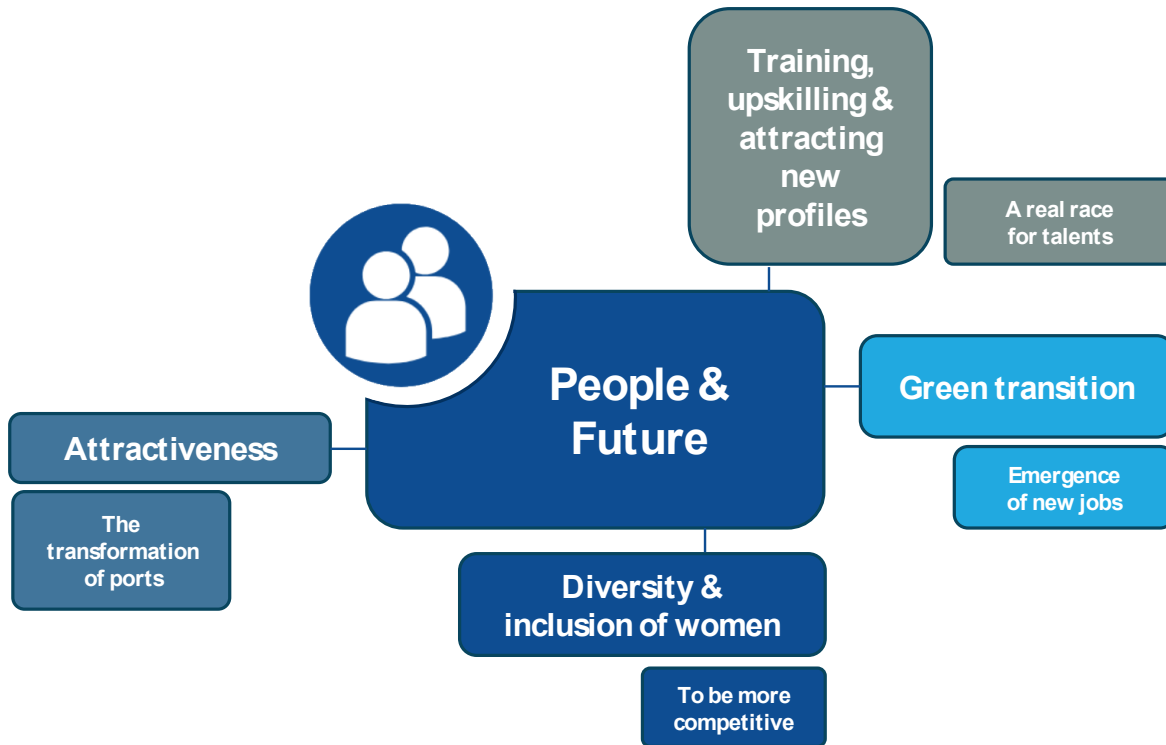


Criteria used to identify "high risk" cargoes should be harmonised across the EU, to preserve the level playing field, as different levels of "strictness" could play in the hands of organised crime as ports with the lowest level of control – or with the highest number of loopholes – would be chosen as hubs for illicit trade.





# 4 People & Future



## Green transition: Emergence of new jobs

The green transition in European ports is driving the emergence of new jobs, the creation of new profiles, and intensifying the race for talent. As ports transition towards sustainability and adopt greener practices, they require skilled professionals with expertise in various areas related to environmental management, renewable energy, digitalisation, and sustainable logistics.

With the adoption of green technologies such as renewable energy systems, electric vehicles, and energy-efficient infrastructure, there is a growing demand for specialists in green technology implementation and management. These professionals apply sustainable solutions to port operations.

Environmental engineers and specialists play a crucial role in ensuring compliance with environmental regulations, managing waste, reducing emissions, and implementing sustainable practices in port operations. They assess environmental impacts, develop mitigation strategies, and monitor environmental performance.



As ports increasingly invest in renewable energy sources such as solar, wind, and hydroelectric power, there is a need for renewable energy experts who can design, install, and manage renewable energy systems within port facilities. These professionals optimise energy production, maximise efficiency, and integrate renewable energy into port operations.



The digitalisation of port operations generates vast amounts of data that require analysis and interpretation to optimise performance, enhance efficiency, and support decision-making. Data analysts, IT specialists, and digitalisation experts play a critical role in leveraging data analytics, artificial intelligence, and IoT technologies to drive innovation and sustainability in port operations.

Sustainable logistics and supply chain managers oversee the integration of green practices throughout the supply chain, including transportation, warehousing, and distribution processes. They develop green logistics strategies, optimise transportation routes, and minimise environmental impacts while ensuring efficient and cost-effective operations.

As the demand for green skills and expertise grows, there is a need for training and education specialists who can develop tailored programs, workshops, and training sessions to build capacity and upskill the existing workforce in green technologies, environmental management, and sustainability practices.

## Training, upskilling and attracting new profiles: A real race for talents

Historically, port work consisted of manual handling in general cargo terminals, posing physical challenges for workers. Today's ports feature diverse terminals, including containers, dry bulk, liquid bulk, and RoRo, operated with modern equipment and digitised control systems.

Today, training schemes in European terminals are elaborated to meet the requirements of new tasks and the evolving nature of work. They vary across Member States and from one port to another, but the quality of the trainings is recognised at global level as each year many port workers coming from different regions of the world train at European port training centres.

Employers prioritise high training standards for greater efficiency and safety in European terminals. Safety is integral to efficiency, and employers aim to minimize accidents through effective training systems. With millions invested in port equipment, employers seek optimal returns by ensuring safe operations led by highly skilled individuals.



Upskilling and reskilling of the port workforce is considered a priority of the sector, since the activity of port workers now requires the use of complex machinery, operating control rooms,

managing conveyor systems, using digital equipment for inspections and plugging ships to On Shore Power Supply. Despite reduced hazards, the port sector requires high training standards to prevent accidents. Substantial resources allocated to improving standards contribute to increased efficiency and safety in cargo handling at ports.

The race for talent in the green transition presents both challenges and opportunities for European private port companies and terminals. To attract and retain top talent, many companies offer competitive salaries, professional development opportunities, and a supportive



work environment that values innovation, sustainability, and social responsibility.

Terminal operators are actively investing in training to enhance the skills of their workforce. Nevertheless, finding good profiles with a knowledge of the port sector remains challenging.

Given the rapid social and technological changes already underway, particularly in the types of skills demanded by the labour markets of the fourth industrial revolution, the case for acting now is compelling for individuals, employers, and policymakers.

## Scope of the European Sectoral Social Dialogue for ports



- Social dialogue respects national, regional and company agreements.
- The Social partner define the scope of the social dialogue and the EU Commission acts as a facilitator.
- The social agenda addresses issues such as health and safety, gender inequalities, training and the adaptation to technological innovation.

Training and Qualifications

Ensure greater flexibility and performance standards and generalise sustainable driving within yards and on docks.

Health & Safety

Establish existing national health and safety requirements  
 - Work to ensure proper enforcement where high standards exist  
 - Where standards do not exist, promote good practice.<sup>2</sup>

Gender Issues

Work to ensure there are no discriminatory recruitment practices in place in European ports.

Innovation

Assist and set up the basis for a constructive dialogue between employers and employees to meet the challenges resulting from technological innovation.



## Recommendations



The EU Commission's Recommendation on means to address the impact of automation and digitalisation on the transport workforce should translate into support through ERASMUS+ and the Blueprint for sectoral cooperation on skills.



Collaboration with educational institutions, industry associations, and government agencies can help bridge the skills gap and cultivate a skilled workforce capable of driving the green transition forward.



In the realm of port work, the European Sectoral Social Dialogue for Ports established in 2013, is central to discuss sector changes and develop initiatives that maintain attractiveness for workers. The EU Sectoral Social Dialogue for Ports should be granted the adequate means to pursue its work.



The diverse landscape of training programs in the European Union spans national, regional, and company levels, emphasizing the need for a flexible approach tailored to local circumstances.

## Attractiveness: The transformation of ports

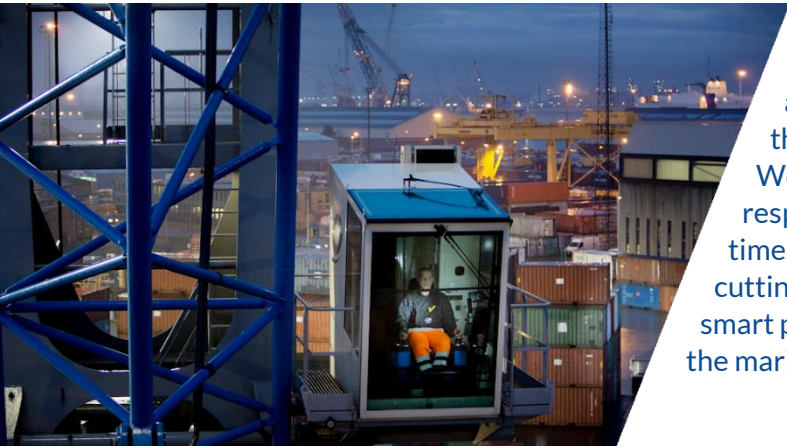
Having a skilled workforce is essential for attracting and retaining investments in ports. Investing in education, vocational training, and workforce development programs tailored to the needs of the maritime industry can enhance the attractiveness of port locations to investors.

The European port sector provides a wide range of job opportunities across various fields, including maritime logistics, port management, engineering, operations, safety and security, environmental management, information technology, and customer service. Workers have the flexibility to choose from diverse career paths that align with their skills, interests, and expertise.

Port workers typically benefit from long-term employment prospects and job security, particularly in established ports with robust operations and steady cargo volumes.

European private port companies and terminals invest in training and development programs to equip workers with the necessary skills, knowledge, and certifications required for their roles. Training initiatives may include specialized courses, workshops, on-the-job training, and professional development opportunities that enable workers to enhance their competencies and stay ahead of industry trends.





Many private port companies prioritise work-life balance and offer flexible work arrangements, shift scheduling, and leave policies that accommodate the needs of their employees. Workers can balance their professional responsibilities with personal commitments, family time, and leisure activities. They also can work with cutting-edge technologies, automation systems, and smart port solutions that drive innovation and transform the maritime industry.

## Diversity & inclusion of women: To be more competitive

Some of the challenges faced by the transport sector relate to the shortage of workers (often associated with unfavourable working conditions). The adaption of training programs to improve workers' skills (upskilling/ reskilling) is a priority as it provides port terminals with a real competitive advantage. The advent of technological innovation and automation is facilitating and increasing the employment of women.



## Recommendations



The promotion of equal job opportunities for both men and women should be a priority within ports and beyond as any shortage in the sectors upstream and downstream ports means risks of disruption in European ports.



Data collection and analysis to identify gender disparities and monitor progress over time is very important. This approach ensures accountability and facilitates continuous improvement in fostering gender equality within the port sector.

## FEPORT Members



## FEPORT members perform activities and are present in







## ABOUT US

Since 1993, FEPORT represents the interests of 2 290 private port companies and terminals performing cargo handling, intermodal and logistics related activities in the seaports of the European Union. FEPORT members employ more than 400 000 ports workers.



## FEPORT'S MISSION



FEPORT speaks on behalf of its members, promotes their collective interest and presents their positions.

FEPORT is committed to ensure inclusive dialogue and constructive exchange of views between its members and European policy-makers.

FEPORT undertakes all initiatives that favour a better understanding of the priorities of the European private port operators' sector by key stakeholders.

## CONTACT US

Avenue des Arts, 3 - 4 - 5, 6th floor, Brussels 1210  
TEL: 00 32 (2) 218 88 19 ~ 00 32 (2) 732 31 49  
FAX: 00 32 (2) 732 31 49  
EMAIL: [secretariat@feport.eu](mailto:secretariat@feport.eu)



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