



ECSCA

European Community Shipowners' Associations

Maritime day

24 May 2018, Mariehamn

Shipping policy in the global context





ECSCA

European Community Shipowners' Associations

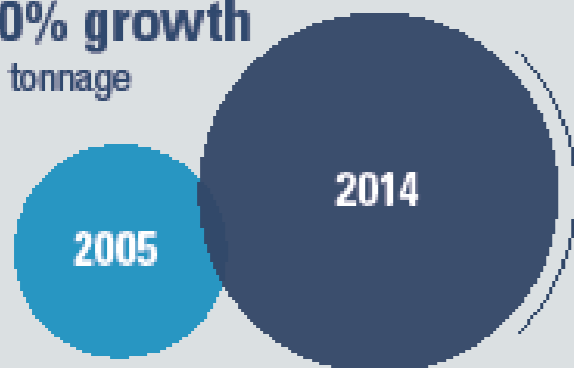
About ECSCA

- Representing 21 national shipowners' associations of the EU countries and Norway
- Founded in 1965
- Promotes and protects the interests of European shipping
- Brussels Secretariat – 9 employees

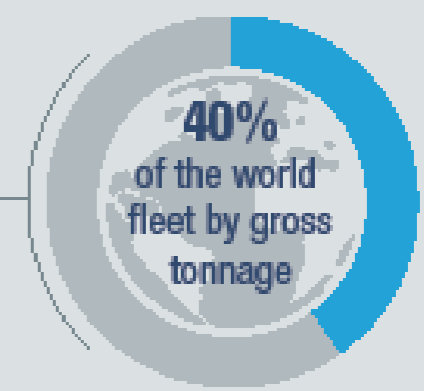
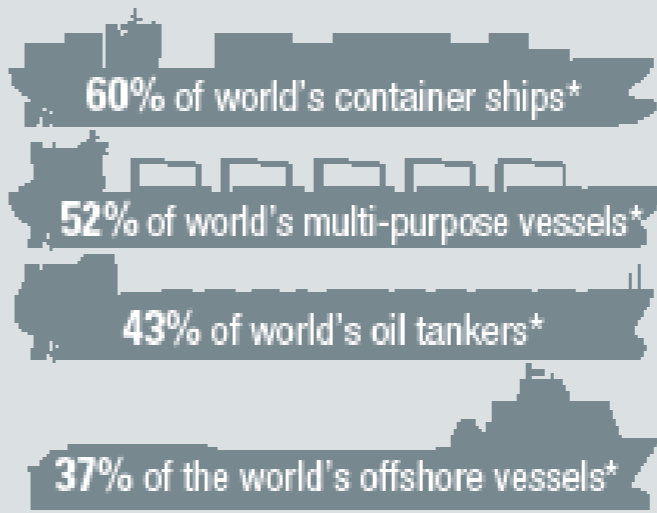
The economic value of the EU shipping industry

The EU controlled shipping fleet in numbers

70% growth
in tonnage

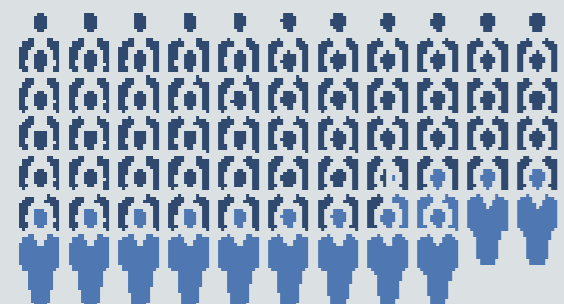


660 million deadweight tonnes
450 million gross tonnes
23,000 vessels



*By gross tonnage

Direct economic impact



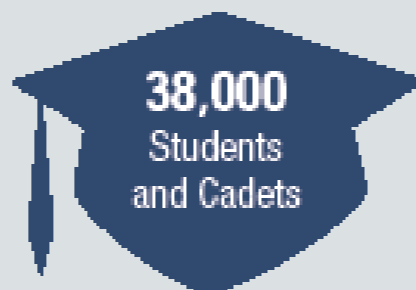
640,000
people employed



Sea based jobs



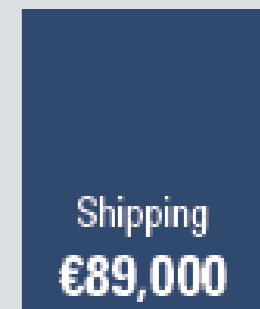
Land based jobs



38,000
Students
and Cadets



€57
billion
to EU GDP



GDP per worker

Indirect impacts

€60 billion
contribution to
GDP

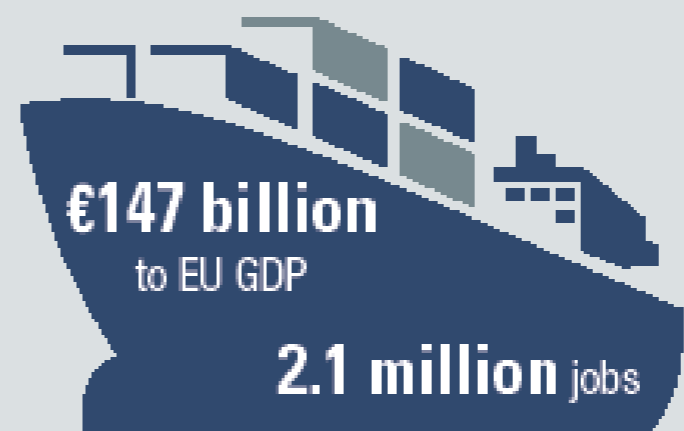
980,000
jobs

Induced impacts

€30 billion
contribution to
GDP

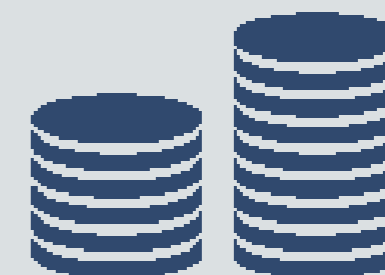
477,000
jobs

Total economic impact



€147 billion
to EU GDP

2.1 million jobs



For every **€1 million** of GDP the shipping industry creates, another **€1.6 million** is created elsewhere in the EU economy

The economic value of the EU shipping industry

Direct employment

- 640,000 people employed
 - 516,000 sea based jobs and
 - 124,000 land based jobs
- Sea based jobs
 - 40% are EU/EEA nationals
 - 60% non EU/EEA nationals



What we do

- ECSA comments on and formulates proposals for global and EU policy making and the execution and enforcement of existing regulations on many topics – **competitiveness, trade policy, environment, safety, security and social affairs**
- The Secretariat carries out the work **at EU level**
- Experts from ECSA's member organisations participate in the work of **working groups and committees**
- **Offers a single point of contact and expertise** to our partners in the institutions and stakeholders in Brussels

The global context

- Market situation
- Center of gravity of shipping to Asia
- Free trade in danger
- Sanctions US
- Environmental performance – emissions to air, ship recycling
- Automation and digitalization
- Security and cyber security
- Brexit



Policy priorities

- IMO:
- Air emissions – CO2, Sulphur, black carbon
- Ship recycling – Hong Kong convention (to make EU regulation superfluous)
- EU:
- Trade – EU to support and conclude Free trade agreements, to fight protectionism
- Sanctions US: protect EU based companies against US sanction policy
- Brexit – firm course EU needed– frictionless trade, movement of passengers –seafarers - office personnel, market access

Competitiveness EU versus non EU

- Valetta declaration 2017 of EU Ministers for Transport:
- 1. **UNDERLINE** that, in order to develop a world leading maritime transport industry in Europe, it is essential to provide stable, predictable and competitive framework conditions
- 2. **RECALL** that well-connected and modern ports and efficient short sea shipping play a key role to preserve and attract new industries and logistic activities, to link up the different regions within the internal market of the Union and support the greening of transport;

Competitiveness of EU as location for shipowners

- ECSA's Monitor Deloitte study
- EU compared with Singapore, Hong Kong, Dubai, Vancouver and Shanghai
- Taxation and fiscal incentives, availability of professional services, regulatory, economic and political factors, skills, flag attractiveness, ease of doing business, legal framework for vessel exploitation and availability of finance
- The EU has an overall competitive regime in place
- To develop further growth and competitiveness, the EU however needs to adapt this framework into a comprehensive, globally oriented shipping policy

Competitiveness for short sea shipping

- ECSCA's proposals for a 'Short Sea 2.0' policy
- Identify and remove all barriers for short sea shipping
- Complete the Single Market for SSS
- Simplify procedures for regular short sea shipping services with third countries (non EU)
- Ensure market access to port services and guarantee free movement of goods
- Devise competition-neutral ways to financially stimulate short sea shipping



Thank you!

Martin Dorsman