



Resilient Waterborne Logistics Supply Chains: A Key to EU Competitiveness

The waterborne ecosystem is a dynamic, multifaceted industry comprising a diverse spectrum of public and private stakeholders, ranging from maritime and hinterland infrastructure managers and operators to product manufacturers and service providers. As a cornerstone of the European economy, the sector facilitates nearly 90% of the EU's international trade, accounting for 81% of external trade and 40% of internal trade. It is also a key driver of employment and economic growth, providing 4.2 million direct jobs and contributing approximately €500 billion annually to the EU's Gross Domestic Product.

This ecosystem is fundamental to reinforcing the EU's resilience across trade, security, defence, energy supply, and sustainability. To maintain its global leadership, the sector continues to invest in innovation, green and digital transformation, and supply chain efficiency. However, achieving these ambitions necessitates a fully integrated transport and logistics ecosystem, encompassing maritime and land transport, terminals, and supporting logistics services¹.

We fully support the key initiatives recently proposed, including regulatory simplification, lowering market entry barriers to enhance competition, facilitating access to finance to bolster competitiveness, the attention to industrial clusters, promoting labour upskilling and quality employment, and improving policy coordination at both the EU and national levels. To ensure a

¹ According to the 2024 Transport in the European Union Report issued by DG MOVE, this interconnected ecosystem represents over 5% of total employment and nearly 5% of the EU's gross added value. As such, ensuring the sector's long-term competitiveness and resilience requires a coherent and coordinated approach at both EU and national levels.

strong, future-proof waterborne ecosystem, it is imperative to leverage synergies and interdependencies between the different industries.

Our collective stance strongly advocates for an ecosystem-driven strategy that prioritises the eight key pillars outlined below.

We urge policymakers to incorporate these priorities into the EU's broader industrial, transport and sustainability agenda, ensuring that the waterborne ecosystem remains innovative, resilient, and competitive.

1. Ecosystem Approach

Adopting an integrated approach will be a critical success factor, ensuring that environmental, economic, and social factors are considered collectively. It is essential that measures are put in place to enable a stronger harnessing of synergies between the different economic actors of the logistics chain. Such measures could include making sure that the proposals which will be laid out in the upcoming EU Maritime and Port Strategy are developed in synergy to minimize the opportunity costs as port communities are integral components of the maritime industry. In this regard, we strongly welcome the value chain approach enshrined in the Clean Industrial Deal.

2. Resilience and Preparedness for potential disruption

Building resilience in the waterborne sector requires more than just preparation for disruptions; it demands a strategy that ensures adaptability and long-term growth. Strengthening governance, investing in digital and cyber resilience tools, and fostering collaboration can enhance the sector's ability to anticipate and respond to challenges. Upgrading infrastructure to withstand environmental and operational pressures, diversifying transport options, and securing essential resources can improve reliability. Encouraging innovation in sustainable technologies and digitalisation will further reinforce resilience. Equally important is equipping the workforce with the skills and knowledge needed to manage crises effectively. By embedding resilience at every level, the sector can not only withstand shocks but also thrive in an increasingly complex and dynamic global environment.

3. Multimodal Connectivity and Infrastructure

Strengthening multimodal connectivity in the waterborne sector requires targeted investment in the trans-European transport network (TEN-T) to ensure seamless and resilient links across transport modes and to allow for Europe's military mobility and preparedness. According to the Draghi report, completing the TEN-T will require €550 billion by 2030, highlighting the urgent need for financial commitments. To enhance connectivity, infrastructure development must be paired with digital integration, regulatory streamlining, and improved coordination between waterborne and land transport networks.

Addressing bottlenecks at key hubs and corridors, expanding multimodal terminals, ensuring or improving connectivity with high-capacity and efficient modes of transport such as rail and wherever applicable inland water ways, will contribute to enhance the transport services connecting ports to the hinterland. Increasing the multimodal capacities within and beyond the EU's ports thanks to an international approach to capacity management and utilisation as well as cross-border

interoperability, will prevent congestion, optimise logistics flows and increase the resilience of the networks.

Furthermore, developing shared operational and business models based on innovation and Industry 4.0 technologies will facilitate overcoming current barriers and bottlenecks present at multimodal supply chains in Europe (i.e. lack of overall process visibility and reduced cargo situational awareness, low synchronisation level of multimodal operations, reduced adoption of available information exchange standards, etc.)

4. Ensuring a Competitive, Predictable, and Fair Economic Environment

A stable and predictable regulatory and investment framework is critical to the long-term competitiveness and economic viability of the European waterborne sector. To sustain its position in global markets, the EU must ensure a level playing field by mitigating market distortions through harmonised taxation rules, addressing regulatory asymmetries, and protecting against unfair competition from regions with less stringent requirements. Streamlining permitting processes, reducing regulatory fragmentation, and ensuring transparency in foreign direct investment (FDI) policies will enhance capital allocation efficiency, lower transaction costs, and improve investor confidence.

A strategic balance between open market access and economic security measures is essential to safeguarding European economic sovereignty while attracting investment and fostering resilient, innovation-driven growth in the sector. To this end, we support regulatory simplifications as an important first step towards reducing legislative burdens and welcome the revised FDI Screening Regulation to strengthen Europe's ability to protect strategic assets while ensuring fair competition and investment.

5. Innovation as a Driver of Competitiveness, Sustainability and Resilience

Investing across the value chain in research, development, innovation, and deployment of new technologies, alternative fuels, and advanced port, waterway, rail, and road infrastructure is fundamental to the European waterborne sector's evolution.

To ensure European industry remains at the forefront of global competition, innovation must be a strategic pillar that boosts talent attraction, enhances efficiency and preparedness, reduces emissions, and drives long-term growth. The Innovation Fund should serve as a cornerstone of this effort, providing targeted financial support to accelerate the development and deployment of cutting-edge solutions. Increased funding and streamlined access to the Innovation Fund and the future Framework Programme are essential to scaling up innovative and breakthrough technologies and ensuring the competitiveness of the sector while maintaining sustainability objectives.

6. Adequate and Accessible Funding

Securing sufficient financial resources is essential to implementing strategic initiatives that enhance the competitiveness, sustainability, and resilience of the European waterborne sector. Public funding must remain a cornerstone of transport investment, with a strong, centrally coordinated European transport funding instrument. The Connecting Europe Facility (CEF) and other EU mechanisms

should be reinforced to ensure long-term financial stability and avoid fragmentation through excessive reliance on national funding instruments.

In parallel, private capital must be mobilised to complement public investments. Leveraging blended finance models, including public-private partnerships (PPPs), project bonds, and loan guarantees, can improve risk-sharing mechanisms and unlock large-scale investments. Additionally, the EU Sustainable Finance Framework must align with transport investment needs, ensuring green financing tools such as green bonds and sustainability-linked loans are accessible for maritime and multimodal projects.

7. Supporting Industry leaders and SMEs

Encouraging a diversified waterborne and port economy requires strong support for both industry leaders and SMEs, particularly those that create high-quality jobs and contribute to a competitive and resilient logistics chain. SMEs play a crucial role in enhancing efficiency, sustainability, and innovation across the sector.

A comprehensive European competition policy should guarantee equitable market entry, actively prevent excessive market concentration and the abuse of dominant position of large enterprises, and recognize the specific nature of certain companies performing public service obligations, thereby safeguarding opportunities for SMEs to compete effectively. This is vital to nurturing a vibrant, competitive, and innovation-driven maritime ecosystem. Public-private partnerships and SME-friendly procurement further integrate SMEs into global supply chains, strengthening the sector's long-term economic sustainability and adaptability.

8. Protecting and promoting quality jobs within the waterborne sector

The waterborne sector cannot function without its workers. Seafarers, R&D experts, dockers, port workers, port service providers and those in associated logistics form the backbone of the industry. Labour shortages threaten the effectiveness and competitiveness of the sector. Good working conditions not only attract investment in innovation but also reinforce the efforts of responsible firms. It is therefore essential that upcoming European strategies include a strong social and labour dimension, developed in cooperation with social partners, and aligned with the upcoming Quality Jobs Roadmap. Measures must promote high-quality employment, strengthen social dialogue, and enhance training and upskilling opportunities for workers.

Conclusion

By advancing these priorities, a European waterborne ecosystem will serve as a crucial instrument to tackle current challenges, foster high-quality employment within the EU, and position the sector and its broader ecosystem for long-term sustainable growth and global competitiveness. A well-designed inclusive and comprehensive strategy will strengthen Europe's industrial resilience, enhance economic opportunities, and support the transition to a more innovative and sustainable transport network.

The undersigned organisations stand ready to engage in a constructive, transparent, and open dialogue with the European Commission to shape a forward-looking competitiveness plan that secures Europe's leadership in the global waterborne sector.

COCERAL – European traders in agri-commodities and agrosupply;

CER – Community of European Railway and Infrastructure Companies

CLECAT – European Association for Forwarding, Transport, Logistics and Customs Services

FEPOR – Federation of Private Port Operators and Terminals

ERFA – European Rail Freight Association

ESPO – European Sea Ports Organisation

WATERBORNE – Waterborne Technology Platform

INE – Inland Navigation Europe

EBU – European Barge Union

ETF – European Transport Workers' Federation

ESC – European Shippers' Council

ECASBA – European Community Association of Ship Brokers and Agents

EMPA – European Maritime Pilots' Association

UNISTOCK – European association of portside storekeepers of agri-bulk commodities

ETA – European Tugowners Association

EuDA – European Dredging Association

TIC 4.0 – Terminal Industry Committee 4.0

The Waterborne ecosystem:

Europe boasts one of the largest and most advanced shipping fleets globally, comprising 35% of the world's total fleet. Besides it can rely on an inland fleet of roughly 17.000 freight and passenger vessels of all different kinds offering low emission transport and modal shift potential on the network of European waterways. It is of increasing economic importance to the tourism sector in Europe. The European maritime technology sector is a global leader in high-tech shipbuilding, green and smart port solutions, and advanced shipping technologies. It supplies almost half of the world's maritime equipment and has been instrumental in the design and development of the majority of the world's fleet power systems.

European ports, which collectively handle over 3.5 billion tonnes of cargo annually, play a strategic role as multimodal hubs, gateways to trade, enablers of the energy transition and diversification, and facilitators of the decarbonisation of waterborne transport, securing the supply of all types of raw materials, semi and finished products to all European territories. Inland waterways further strengthen this ecosystem by ensuring efficient and sustainable transport of large cargo volumes within ports' hinterlands while also serving as an essential resource for industrial applications, such as cooling and heating power plants.