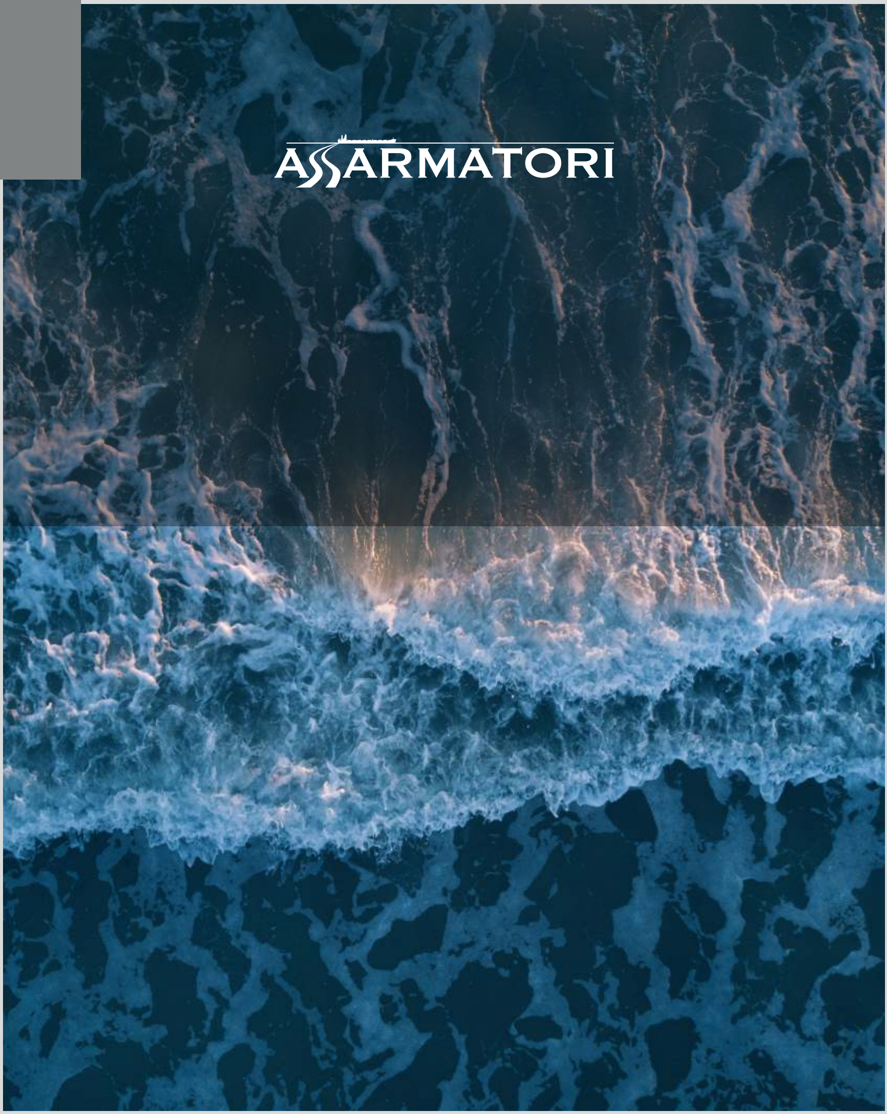


Assarmatori
European work-plan

2024
—
2029

Assarmatori in Italy

over
40%
of the total volume of both import and export of containerized cargo

over
50%
of the Motorways of the Sea services and maritime transport services with the islands

over
40%
of regular cruise services in Italy, the largest cruise market in the EU

over
90%
of the local public passenger transport by sea

liquid and solid bulk cargo services for the national industry, which is largely dependent on imports of raw materials and energy

Our Members

operate more than **600 ships** engaged in regular services in Italy

employ more than **60.000 men and women in Italy,** half of them as seafarers

guarantee over the **25%** of the imported and exported goods to the third largest economy in the Eurozone

provide towage operations in a large number of Italian ports

are the most important customers of the national shipbuilding industry

ensure, through their subsidiaries and affiliates, over 40% of the terminal services in Italy, both for passengers and goods

Connect Italy with over **400** ports worldwide

guarantee sea transport services to more than **30 million passengers** per year in Italy

Assarmatori
A qualified representation of shipping operators.

Assarmatori is the voice of Italian, European and international shipping companies that own, operate or charter commercial vessels engaged in both domestic and international services in Italy. Our members are devoted to a diverse range of activities, including but not limited to container, multi-purpose, cruise, cabotage and connections with the islands, and Motorways of the Sea.

Assarmatori represents the Italian shipping sector and its industry before national, European and international institutions, advocating for a favorable perspective on the dynamics, requirements, and commitments of the shipping industry.

The spirit of our action
Awakening a Mediterranean identity in the EU.

The European Union has recently tightened oversight of the maritime sector, promoting a twin green and digital transition towards greener, more effective, and more resilient activities. To this extent, **we reiterate our unwavering commitment to delivering the twin transition** and providing the institutions with our valuable recommendations. **Nonetheless, we hold the belief that at times, the European climate legislation fails in ensuring a level playing field in the single market.**

The recent Union policies on the twin transition have been mostly shaped by the contribution of the northern European cluster. Thus they have different effects in the North and in the South of Europe. There is an absolute need to consider the geographic, social, and economic characteristics of the Mediterranean Member States, that demand a policy shaped on the unique peculiarities of the Mediterranean maritime sector.

The maritime sector of the Mediterranean Member States is clearly characterized by:

A complex and prosperous network of domestic cabotage and short sea shipping routes, that ensures territorial continuity;

A fleet leading in the Motorways of the Sea sector, that is contributing to the modal shift and the decarbonization of transport activities;

The largest number of cruise ships regularly docking in ports, thereby contributing to the economic development of coastal communities, but also presenting significant difficulties in the area of tourism administration;

Ports embedded in the topography of the cities (the so-called city-ports model), which make the development of alternative fuels infrastructure extremely challenging;

The proximity to North African countries, whose ports have a more favorable market position due to several factors, such as the cheaper labor cost and the large availability of public and private financing with less environmental conditionalities.

These common aspects are more than simply unrelated factors characterizing a commercial fleet. **They are expressions of an identity** shared by each maritime Member State boarded by the Mediterranean. **The spirit of our action is aimed at awakening that common identity and building upon it a Mediterranean perspective on the most significant European policies**, both present and upcoming. In this spirit, **our strategic work-plan for 2024–2029** considers the challenges and threats that shipping industry and the institutions must face together in order **to achieve a competitive, resilient, and greener shipping sector.**

1.
Decarbonisation and sustainability.

The maritime industry needs to define the sustainable maritime fuels that should be scaled up and deployed in the years to come. Once defined, Member States must grant access to those fuels both in terms of volumes and of bunkering infrastructure in ports. **The current price gap between conventional fuels and sustainable alternative fuels is still excessively wide.** This hinders the possibility of a widespread uptake of alternative fuels in the maritime sector, especially in the most fragile sectors like the connections with the islands and the Motorways of the Sea. **It is essential to overcome the principle of technological neutrality**. We need a precise strategic choice on the types of fuels that we will deploy on board. Failing in determining which will be the fuel or the fuels of the future will have detrimental consequences, in terms of loss of competitiveness and connectivity.

Call to action.

- **Overcoming the principle of technological neutrality and scaling up the production of sustainable maritime fuels,** particularly biofuels and liquefied natural gas (LNG) during the initial phase of the transition, as they can rely especially on the existing infrastructure;
- **Bridging the price gap through European and national financial resources**, such as those coming from the ETS maritime, recurring at the same mechanism established for supporting the uptake of sustainable aviation fuels (SAF);
- **Establishing a Book&Claim mechanism** in the European legislation on the decarbonization of the maritime sector (e.g. FuelEu Maritime);
- **Aligning the EU Taxonomy with** the provisions detailed in FuelEu Maritime about the **fuels eligible to contribute to the decarbonisation** of the maritime sector;
- **Ensuring a sufficient level of support to the deployment of alternative fuels infrastructure in ports,** both in terms of public funding and tax reduction, in order to achieve the objectives set forth by the Alternative Fuels Infrastructure Regulation (AFIR), especially onshore power supply (OPS).
- **Acting at the international level to review the Carbon Intensity Indicator (CII) and deliver a consistent IMO climate legislation that can establish a global level playing field** (e.g., global GHG fuel standard and global GHG fuel mechanism), as well as recognizing it in the upcoming revisions of the EU climate legislation;
- **Shaping a network of Mediterranean green corridors** to incentivize the decarbonization of the sector, starting from prioritized routes that have significant social, strategic, and economic value.

2. A competitive maritime sector.

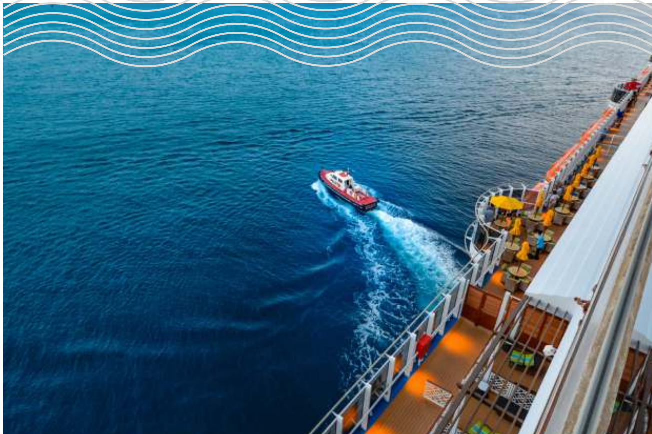
The maritime sector operates in a globally competitive landscape. If appropriate corrective measures are not put in place, **every financial or operational burden set forth at the regional level could result in a loss of competitiveness** for the entire maritime value chain. **Moreover, the European shipbuilding industry has lost its appeal** in recent decades when it comes to the construction of a substantial number of fleet segments, due to the lack of a proper industrial policy dedicated to the sector. As a consequence, **the offer of European financial private products dedicated to the maritime industry has decreased considerably in the last decade.** Without substantial policies aimed at supporting the competitiveness of the European shipping sector, we will face **the concrete risk of carbon and business leakage** in favor of third countries.

Call to action.

- **Implementing corrective measures** to avoid negative effects on competitiveness caused by the European climate legislation, particularly by the ETS maritime on transhipment activities and on the most fragile segments of the European shipping services, as Ro/Ro and Ro/Pax units;
- **Ensuring that the EU Taxonomy considers the alternative fuels currently available** on the market;
- **Focusing on developing and economically supporting synergies between the shipping sector and shipyards**, particularly in the construction of **new vessels with high technological values**, such as cruise ships and ferries;
- **Updating the Guidelines on State aid for climate, environmental protection and energy 2022** (CEEAG) to create the conditions for a real and prompt renovation of the fleets, thus **ensuring the functioning of the virtuous mechanism upon which the inclusion in the ETS of the maritime sector relies**;
- **Ensuring a proportionate level of taxation and refraining from introducing new taxes** that will hinder the competitiveness of the sector, such as the one proposed by the ongoing revision of the Energy Taxation Directive;
- **Updating the legislation on ship recycling** to protect the competitiveness of European flags without establishing further burdens on shipping companies.

3.
Territorial continuity, connectivity and tourism.

Shipping companies operating in Europe, especially in southern Europe as in Italy, ensure territorial continuity as well as coastal and tourism development. Moreover, thanks to our Members' activities, the Motorways of the Sea are effectively contributing to the modal shift. New policies must be implemented to support and increase the number and the size of these services. Hence, connectivity and territorial continuity have a direct impact on the citizens of the islands and remote regions, as well as on the economic growth of coastal communities and cities with particular attention to the tourism sector.



Call to action.

- **Financial revenues coming from the ETS regime and the penalties issued according to FuelEU Maritime shall support** maritime services granting **connectivity** between the mainland and the islands communities, as well as contributing to the **modal shift**;
- **Supporting the renovation of the fleet that ensures territorial continuity** with small islands, especially High Speed Crafts units (HSC), as it operates in the public interest;
- **Supporting the Motorways of the Sea in the context of the upcoming European Maritime Space**, to shape a framework that could promote modal shift and avoid any competitive disadvantage compared to unimodal road operations;
- **Implementing the Entry Exit System and the European Travel Information and Authorization System** (EES/ETIAS) for passengers without affecting their ability to travel to European destinations and the mobility of seafarers.

The historic challenges and unprecedented threats posed by these turbulent times call for a united effort from all the actors involved in regulating, assisting and safeguarding the maritime sector and its entire supply chain.

In the forthcoming years, **Europe must enhance its economy to facilitate the green transition and establish a resilient and competitive society**. Assarmatori strongly believes that Europe must be at the forefront of innovation and lead the decarbonization of the shipping sector, **ensuring a global level playing field and complementing the Green Deal with an ambitious industrial policy.**

We reaffirm our mission to represent the maritime sector and provide European institutions with proposals built upon a Mediterranean perspective.

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