



GOVERNEMENT

*Liberté
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National port strategy

FOR A PORT NETWORK
INTEGRAL TO LOGISTICS CHAINS,
ECONOMIC DEVELOPMENT
AND ECOLOGICAL AND
DIGITAL TRANSITIONS



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A clear course, strong goals

80% of the world's trade volume is by sea, representing more than 70% of trade in terms of value. With the world's second most linear coastline and geographically well-placed ports in metropolitan France at the centre of trade in Europe and overseas at the crossroads of the world's major shipping routes, France is naturally open to the world and must play an important role in international trade.

The global health crisis linked to Covid-19 shows us to what extent French ports, and in particular its three main entry points, the major seaports of Dunkirk, Haropa (Le Havre-Rouen-Paris) and Marseille, are a strategic asset that is key to the economic activity of our country and an expression of our national sovereignty.

Our port system in its entirety encompasses State and decentralised ports, ports in mainland France and those overseas. It guarantees - particularly in this period of crisis - continuity of supply to various economic industries and they are also centres of wealth creation. The French port system generates on average more than 350 million tonnes of cargo traffic and allows the transit of 30 million passengers. It provides nearly 300,000 direct jobs and the ports of Haropa, Marseille and Dunkirk produce an added value of €13bn.

French ports are also ideal places for setting up new industrial and logistics activities, at the heart of regional development and ecological and digital tran-

sitions. As integrators for many business sectors linked to port transit and logistics, the ports must develop their services to meet the needs of manufacturers and adapt as well as possible to European and global trade flows.

French ports have many assets, but they must now find fresh impetus; this national port strategy sets the course.

As a result of an unprecedented consultation process involving more than 230 public and private players through seven working groups and 30 workshops jointly led by the State and the Regions, this strategy was designed from the outset to be scalable so as to respond to the sometimes-rapid changes in economic and geopolitical contexts.

This new strategy sets a clear goal to regain market share: to increase the share of containerised freight handled in French ports to and from France from 60% to 80% by 2050. It also aims to double the number of direct and indirect jobs linked to port activity by 2050 and to increase the share of rail and waterway bulk transport in pre- and post-carriage port traffic by 30% by 2030.

In a context marked by global turmoil, it must be a versatile tool that provides solutions for the transitions that need to be made, while strengthening the collective action of our French port system.

Jean-Baptiste Djebbari

Secretary of State for Transport
in the Ministry of Ecology

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1.

THE NEW NATIONAL PORT STRATEGY

Ports as agents of economic recovery and ecological transition



The global health crisis and the worldwide disruption it has caused show that the French port system, able to ensure continuity of supply, is a **strategic asset** that is vital to economic activity and an **instrument of sovereignty** that must be strengthened.

In the context of economic recovery, our ports, which already host a dense industrial ecosystem, are **ideal places from which to reindustrialise regions**. They are core to the regions' economic development and at the interface of global economic and logistical flows, on both sea and land. They must also **be used in the context of a global trade strategy** aimed at offering effective solutions to French and European importers and exporters.

This strategy covers **the entire French port system**, both in metropolitan and overseas France, whether they are ports under the authority of the State or decentralised.

This port development strategy must be incorporated into the framework of the **ecological transi-**

tion of the industrial and logistic activities that they accommodate. As integrators of multiple activities, ports are **ideal places to expedite the ecological**

transition of the regions, especially by developing alternative fuelling solutions for ships and boats, circular economy and industrial ecology models, energy transition projects for industrial port zones, as well as the movement of goods by rail and waterways.

As such, the goal of this new national port strategy is to take an **offensive approach to regain market share from rival foreign ports, based on industrial development and sustainable logistics**.

To achieve this, the priority goals are to **increase the appeal of industrial port zones**, particularly for companies involved with the ecological transition and to **improve the competitiveness of our ports** making port transit more fluid, more reliable and financially advantageous for players in international logistics chains.

2.

THE NEW NATIONAL PORT STRATEGY

The challenges



The national port strategy has a clear target to **regain market share**. The goal is **by 2050 to increase the share of containerised freight heading to or from France that is handled in French ports to 80% (vs 60% currently) and also to regain European flows for which French ports make a good transit point**. This market share growth target has been set on the basis of the results of the OECD freight projections for French ports, which show that such a figure is achievable. In addition to transshipment flows, the aim is to strengthen the positioning of French ports in high value-added flows, in particular through diversification of goods industries and strong positioning in containerised goods, ores, chemical products, pharmaceuticals, agri-food processing, dry bulk and emerging sectors (LNG, renewable marine energy, etc.).

Achieving such a target will also require strong and immediate commitment from the State and port authorities with the first actions planned from 2020-2021.

Regaining this traffic will mainly involve the three main sea entry points, namely the major ports of Haropa (Le Havre, Rouen, Paris), Marseille and Dunkirk which account for 80% of major seaport traffic and more than 60% of total French port traffic. These three entry points generate an added value of €13 billion (i.e. twenty times their turnover) and represent 130,000 direct jobs out of a total of nearly 200,000 jobs in the French port economy¹. **Together with the other French ports, those of the overseas territories and the Atlantic coast, they account for the greater part of the national strategic port assets**, both for France's logistical and industrial economy and for national sovereignty in terms of supply. They offer the logistics solutions that are essential for manufacturers, distributors and exporters to position themselves optimally on European and world markets.

The largest ports, through which the majority of domestic and export traffic of the regions' production transits, have a decisive role in the regional econ-

¹ General finance inspectorate, General Council for the Environment and Sustainable Development (2018), report Transforming the economic model of major seaports; Senate, Committee report on Regional Planning and Sustainable Development (2019): Competitiveness of French ports in 2020: the urgent need for a strategy.

2.

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The challenges



omy. They are therefore essential sovereign tools for these territories. Most of the strategic goals and actions of the roadmap can be implemented in overseas ports. Some, such as the energy transition, will nevertheless be applied differently than in mainland France. So, given the nature of electricity production in the overseas territories, the solutions provided to achieve energy transition objectives and in particular related to the deployment of shore-side electricity will be of a different and often innovative nature. Other objectives such as modal shift or flow consolidation will only have limited relevance.

To contribute fully to the economic recovery embarked upon by the Government, the French ports must find a fresh impetus by enhancing their capacity for mobilisation, responsiveness and reliability. They must also overcome several obstacles to their development and find growth drivers to jointly face the fierce European competition. Their market share remains modest compared to other European ports with less than 8% market share for all French commercial ports at European level. They must continue to develop connections to bulk modes of transport, which are less developed than their direct rivals, thereby limiting the development of their hinterlands. They are also grappling with the structural decline of their traditional sources of income, in particular the oil and gas trade, which is leading to a thorough review of their business model.

Economic research shows that French ports must

strengthen their position in traditional industries that form the basis of their economy, such as containers, ro-ro ships, dry bulk, chemicals and cruises, whose resumption must be anticipated. **They must also position themselves in the industries of the future by attracting new activities that will provide growth drivers** for traditional sectors such as renewable energy, industrial ecology, storage and the supply of alternative fuels, while continuing to develop logistics activities. The OECD's work on the long-term prospects for French ports shows that without a fundamental transformation of the port industries and the identification of traffic drivers in growth sectors, the volumes of freight transiting through our ports will stagnate between now and 2050, with a major risk of seeing the gap between the main European ports widen, with ports that have not overcome these challenges being relegated to secondary status.

Faced with simultaneous major transformations, French ports must provide responses in the short term to:

- **changes in economic patterns** affected by the concentration of maritime alliances, Brexit, the penetration of the Silk Roads in Western Europe, the vertical integration of logistics chains by an increasingly smaller number of operators, as well as the effects of the crisis on the globalisation of trade;
- **the ecological transition**, with a view to a low-carbon transport economy by 2050, while almost 50% of the total traffic of the major seaports is still made up of oil and gas and coal;
- **the digitalisation of logistics chains** which is becoming a deciding factor in port services and the competitiveness of our ports.

The risks and opportunities associated with these transformations make it essential to evolve from the current model of "major seaport developer" resulting from the 2008 reform² to a model of "port entrepreneur", with a role of regulating activities on

its public port domain, capable of anticipating and accompanying these transformations and turning them into opportunities to develop its traffic and its market share. In this model, the port authority takes on the role of project owner in the production of infrastructures for logistic, industrial or urban use (financing and operational management of projects), which it then manages and markets. The port is expanding its role as a facilitator of the port area in order to adopt offensive strategies to increase added value in existing logistics chains and to develop new activities (real estate, industrial). Such a model aims to develop the port's land resources to maximise its revenues, whether from state revenue or from port traffic (the development of industrial or logistical establishments helps to maintain or increase traffic).

The "entrepreneurial" ports must therefore become more agile, able to meet their customers' demands and develop know-how that will eventually enable them to co-invest knowledgeably in certain cases alongside private partners by moving up the value chain while controlling the risks. They must also **develop bulk modes of transport even further**, in order to strengthen their areas of influence and economic appeal (hinterland) and thereby their competitiveness amidst increased competition.

To this end, the ports will be able to rely on the national strategy for rail freight, provided for in the "*loi d'orientation des mobilités*" (French Mobility Orientation), in order to strengthen the rail service to the ports and their hinterland. They will also be able to benefit from measures to simplify administrative procedures for setting up industries in the industrial port zone, provided for in the draft law for the acceleration and simplification of public action (*loi d'accélération et de simplification de l'action publique*), which will make it possible to send a positive signal to industrialists and logisticians wishing to invest in the French ports.

To support these changes, the **French port sector as a whole would ultimately benefit from better coordination and greater overall consistency** with a long-

term vision for development and investment with a view to meeting the demands of port customers, in compliance with competition rules.

The choice has been made to draw up a single port strategy that brings together the French port system around a common and shared set of goals between major seaports and decentralised ports. This common set does not prevent the specific characteristics of each region from being expressed, and different solutions may be sought that meet the same national goal.

2. Law n° 2008-660 of July 4, 2008 on port reform

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The collaborative development approach



This national port strategy is innovative, both in the way it was prepared and in the scope it covers.

It is aimed primarily at major seaports in mainland France and the overseas territories. However, the latter are part of a larger port system, consisting of all ports in metropolitan and overseas France, managed by the State and the local authorities. The national port strategy thereby takes into account the French port system as a whole, in order to: 1/ limit the risks of creating overcapacity or competition between ports that may result from a lack of coordination between them

with regard to their respective priorities (types of traffic, positioning with regard to transshipment flows, etc.); 2/ to enhance the allocation of public resources; 3/ to ensure a local approach; and 4/ to commit the ports of France to a joint approach to the ecological and digital transitions, for which the strategy is the shared foundation.

The issue is therefore twofold: to reaffirm the State's goal and actions for its major seaports in order to increase their competitiveness against competition from other ports in northern Europe and the Mediterranean, and to ensure the overall consistency of

the French port system, as the port strategy of the State and the regions must be articulated in order to be more efficient, which means a shared vision is required.

To cover all the issues identified on the basis of national and international work, seven working groups have been set up and led by a State representative and a regional representative since spring 2019. In total, more than 230 public and private players were involved in 27 workshops.

This strategy has been designed to be **scalable**, i.e. to adapt to the sometimes rapid economic, digital and geopolitical changes ahead. It provides a **10-year vision** of the course to be followed by the port authorities, port players and the various State departments that contribute to the performance of port transit. It will be taken into account as soon as it is published in the strategic projects of the major seaports currently being prepared, and the **first actions will be implemented from 2020-2021**. It will be implemented in specific ways to cover the entire port network.

4.

THE NEW NATIONAL PORT STRATEGY

Goals

This strategy is in line with the time frame defined by the 2050 ecological transition targets (Paris Agreements, National Low-Carbon Strategy) and by the long-term requirements of economic conversion. As part of this trajectory to 2050, it sets a clear intermediate course and a roadmap to 2030 for all the commercial ports of the French port system.

This new national port strategy aims to move into a more offensive phase of regaining market share. In particular, it aims to address the following challenges:

- **to increase the share of freight to or from France handled in French ports to 80% by 2050**, in particular by consolidating the core industries (e.g. grain) and, at the same time, reinforcing the promising and emerging industries (containers, LNG, renewable marine energy, etc.);
- **double the number of direct and indirect jobs** related to port activity (and more generally to industrial activity, in connection with the reindustrialisation targeted by this strategy) by 2050;
- **increase the share of bulk modes of transport in pre- and post-carriage port traffic by 30%**, by 2030;
- **help port authorities achieve carbon neutrality objectives for transport** by 2050 as part of an ecological transition plan;
- **make the port transit experience more fluid** in particular by fully digitising the reporting formalities involved in the passage of ships and goods through ports by 2025.

To meet these challenges, the strategy includes a **set of four goals common to the entire French port system**, broken down into 16 strategic objectives that

will be implemented through operational actions, some of which are already underway for 2020-2021 (these actions are detailed in the roadmap).

Four goals

1

Ports as essential links in the performance of logistics chains

2

Ports as tools for the economic development of regions

3

Ports as catalysts for the ecological transition

4

Ports as drivers of innovation and digital transition

These goals are reflected in:

- **stepping up the ecological transition of the ports** by streamlining the procedures for setting up innovative economic activities to facilitate welcoming new industrial and logistics clients into the industrial port zones. The creation of an ecolabel for logistics and port flows will enhance the value of all ethical logistics chains that use French ports. This initiative is a world first. If each port authority drafts an ecological transition trajectory, it would help achieve the goal of carbon neutrality in transport by 2050. This trajectory will include providing alternative fuelling services for ships, shore electrical connection services and hydrogen production

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Goals

solutions to meet the needs of the industrial port ecosystem and small ships and boats. This transition must be carried out in conjunction with the regional and local authorities, with the dual aim of speeding up the process of making ports greener and improving the overall competitiveness of the French gateways on all coasts. For overseas ports, shore-side electrification will have to be based on decarbonised electricity production solutions such as photovoltaic solar energy;

- **speeding up the digital transition of ports** by implementing the "Tell us once" and "Paperless" initiatives in the form of a one-stop maritime shop in French ports by 2025. By digitising the entire information flow, the one-stop shop will make the transit of ships through ports smoother by simplifying and standardising the declaration processes that operators using French ports are subject to. The State also encourages and supports the goal of merging cargo community systems (CCS) so that ports have a single tool for tracking cargo in response to competition from foreign ports and in line with the requirements of the ports' economic players and customers. A first step in this ambition will be to seek better interoperability of information and goods tracking systems. Bringing together the skills and experience of those responsible for digital transformation within the ports will make it possible to expedite these innovative approaches, their roll-out and the responses in terms of port cybersecurity to prepare the port of the future;

- **developing the area of influence and appeal of French ports, by working on bulk modes of transport - rail and waterways** - based on the national strategy for the development of rail freight currently being drawn up, through a **multimodal platform organisation plan** and more generally by improving the service and processing capacities of goods flows. This mainly concerns the projects identified in the French Mobility Orientation Law and in particular investments aimed at:

- increasing the processing capacity of containerised goods;
- building infrastructures aiming to improve inter-modality at port level, the extension of platforms, the development of new logistics parks, the improvement of river infrastructures and rail services;
- **strengthening the competitiveness of the French port system in metropolitan and overseas France at international level** by establishing a partnership with Business France and by setting up a monitoring centre for the performance of logistics and port chains.

Most of the trade federations for which ports are a useful tool have expressed their support for this new vision driven by the national port strategy. These same federations have also committed to a national charter to favour French ports in the organisation of their logistics flows.



5.

THE NEW NATIONAL PORT STRATEGY

Governance

The drafting of the national strategy was an opportunity to establish a dialogue between the State, which is responsible for major sea-ports, and the local authorities, which are responsible for decentralised ports. This forum for guiding and discussing the strategic directions of the French port system as a whole (State ports and decentralised ports) is to be made permanent, with the involvement of trade federations representing the economic players in the port, maritime, inland waterway and logistics sectors.

In this context, a monitoring committee for the national port strategy is to be set up under the aegis of the Minister of Transport and the Minister for the Sea, in conjunction with the Secretariat-General for the Sea. This monitoring committee will include Régions de France, the port authorities of the State and decentralised ports, port and logistics sectors, the network operators (SNCF Réseau, VNF, CNR), France Logistique as well as the trade federations (Union des ports de France, Union nationale des industries de la manutention, Cluster maritime français, Union maritime et portuaire de France, Fédération française des pilotes maritimes, Armateurs de France, Association des utilisateurs de

transport de fret, Union des entreprises transport et logistique de France-Overseas, Agents maritimes et consignataires de France, Entreprises fluviales de France), the Secretariat-General for the Sea and the ministries concerned (Economy and Finance and Recovery, Overseas, Europe and Foreign Affairs, etc.). This committee will report to the Interministerial Committee on the Sea (CIMer), the Interministerial Committee on Logistics (CILOG) and the Ministerial Committee on Development and Innovation in Transport (CMIDT). The work of the monitoring committee will also support the work of the Conseil Supérieur de la Marine Marchande (CSMM) and the Comité Maritime État-Régions.

This committee will periodically review the measures implemented and discuss future challenges in order to adapt, if necessary, the strategic objectives and priority actions to be taken. The Directorate-General for Infrastructure, Transport and the Sea (DGITM) will serve as the secretary to this monitoring committee.



6.

THE NEW NATIONAL PORT STRATEGY

Strategic objectives

The 4 goals of the national port strategy are broken down into 16 strategic objectives (SO).

GOAL 1

Ports as essential links in the performance of logistics chains

SO1

Position the ports in the industries of the future and provide the major seaports with the resources to play on equal terms with their European competitors.

The economic transformation must be sustained, in a context of structural decline in oil and gas traffic and the closure of coal-fired power stations, by allowing the development of the necessary growth drivers based in particular on the ecological transition.

SO2

Optimise the price and non-price competitiveness of ports and the operational excellence of ports.

The overall performance of French ports will be assessed to measure how far they have to go to restore confidence in their customers and regain market share from their European competitors.

SO3

Ensure the smooth running of physical and digital operations by setting up a single point of contact at the borders in the ports of Le Havre, Dunkirk and Marseille.

France Sésame, a digital and physical contact point, will provide importers and exporters with a significant gain in terms of performance. It will be responsible for receiving information, mainly electronically, for passing it on to all the public authorities concerned and for ensuring that checks are properly coordinated in order to ensure a smooth logistic chain.

SO4

Develop a joint sales and marketing policy for each route or coastline and a joint economic intelligence capacity.

The priorities of a sales policy on the assets of French ports and the differentiating factors vis-à-vis their competitors for the French and international markets will be defined in conjunction with Business France.



KEY INDICATORS FOR GOAL 1

- ✓ Traffic growth;
- ✓ Market shares of French ports at European level.



GOAL 2

Ports as agents of economic development

so5

Develop the setting up of new activities through a dynamic and shared land management.

The rise of the "entrepreneurial ports" model will be encouraged by giving them the means to develop their non-traffic resources, as well as continuing to diversify their activities and establishing strategies for moving up the value chain, within a framework developed jointly with the ministries concerned.

so6

Link employment with training in the port sector.

The employment and qualification needs of the port, industrial and logistics sector must be identified locally, particularly by strengthening awareness of the skill sets required by port players and the development of partnerships with high schools and higher education to develop curricula in line with changes in the sector.

so7

Develop the hinterland of ports through consolidating flows to capture new markets and reduce the environmental impact of logistics chains.

The modal shift towards rail and waterway systems will be developed, as part of a coordinated approach to port and logistics routes to better penetrate the hinterland and respond to the consolidation of maritime trade. Additionally, special efforts will be made to develop the network of effective multimodal platforms, connected to the major traffic routes and the main logistics hubs, to make the port areas more appealing and to better meet the requirements of the major consumption areas. This work will be carried out in conjunction with the rail freight development strategy.

KEY INDICATORS FOR GOAL 2

- ✓ Value added produced by clusters (Insee definition)
- ✓ Share of bulk modes of transport
- ✓ Job creation

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Strategic objectives



GOAL 3

Ports as catalysts for the ecological transition

SO8

Ensure clean multi-energy generation and supply to provide alternative fuels for ships as part of a national scheme.

To support the ecological transition of maritime and waterway transport, some ports already provide ships and boats with several solutions during their port of calls, such as liquefied natural gas and shore-side electrical connections. Nevertheless, it is essential to accelerate the energy transition and diversify the supply of clean energy. Anticipating the development of emerging solutions should enable French ports to remain competitive and to improve the acceptability and integration of maritime transport activities in the heart of the city thanks to a reduction in pollution. Moreover, port areas host an already dense industrial ecosystem and are therefore ideal sites to develop solutions for the circular economy or for the production of new energy sources such as hydrogen. From now on, as part of the hydrogen strategy presented by the Government on 8 September 2020, the ports must develop a hydrogen production service for industrial and transport needs.

SO9

Increase the value of ethical logistics chains transiting through French ports.

As mentioned during the CILOG meeting on 7 December 2020, the French port ecosystem could play a key role in the decarbonisation of transport chains by 2050. Furthermore, many players, such as shippers, are seeking the most ethical logistics chains to meet the demands of distributors and end consumers. The design and deployment of tools to enhance the performance of logistics chains passing through French ports could help regain market share by encouraging clients to send more of their flows through French ports.



Strategic objectives

so10

Attract innovative companies in the field of ecological transition to the industrial port zone to develop the circular economy and the industrial ecology approach in ports .

Industrial port areas are by nature ideal spaces for setting up companies and their position must be exploited to attract innovative industries, particularly in the area of ecological transition. However, their attractiveness remains low compared to their European competitors. The next generation of strategic port projects should be an opportunity to implement a more ambitious development of their domain. The State, meanwhile, must develop a more competitive administrative approach, as it did when it introduced the VAT import reverse charge, which made French logistics platforms more attractive to importers, by simplifying VAT payment procedures and easing the cash flow burden on importing companies.

so11

Ensure better protection of biodiversity.

Biodiversity efforts must be pursued through the extension of overall plans to manage biodiversity and natural heritage or through the development of innovative projects at local level to protect or restore biodiversity, led by the ports, in partnership with universities and environmental associations.

so12

Strengthen climate change reduction and adaptation measures in ports.

A port ecological transition plan will be drawn up at individual port level to systematically consider adaptation to climate change and to define a carbon neutrality path, suited to local possibilities and specific features.

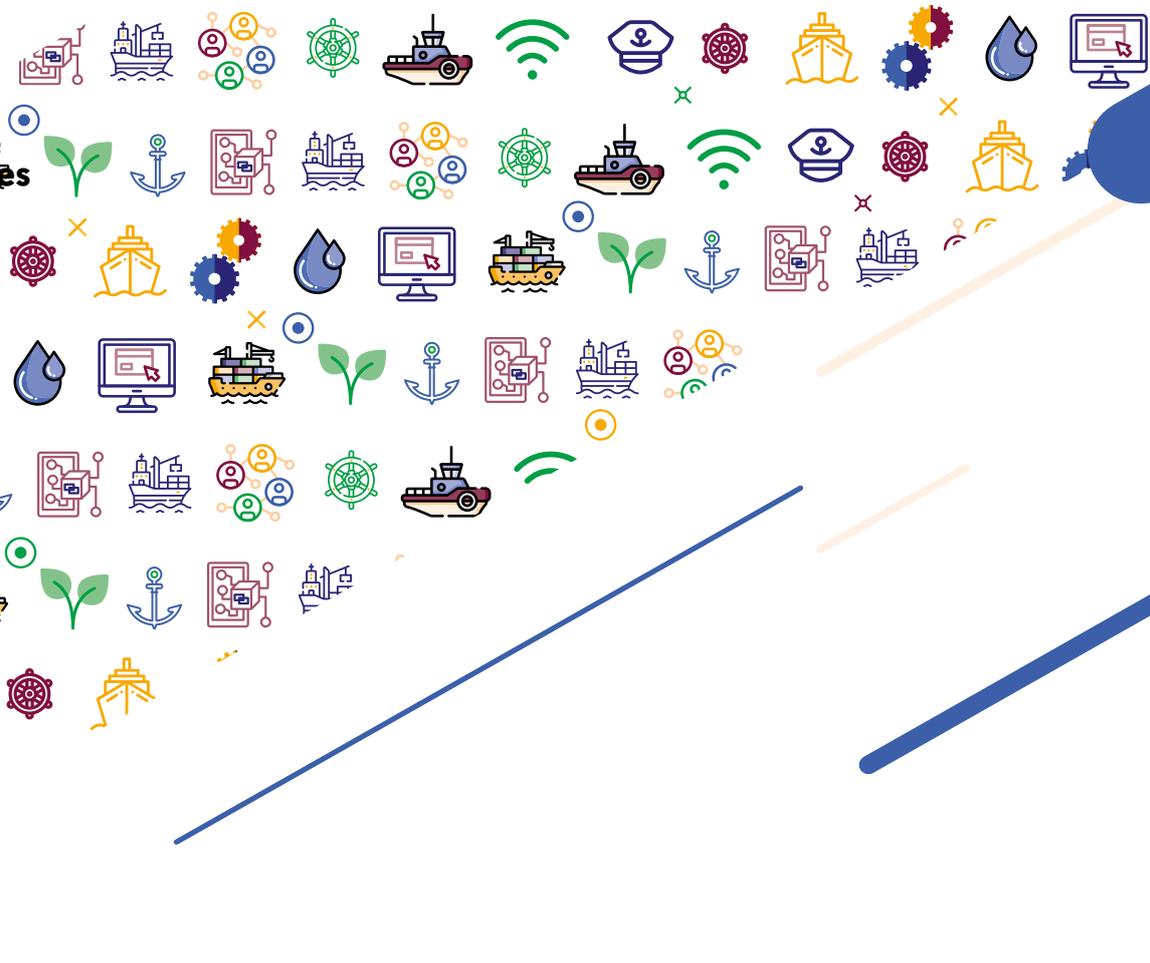
KEY INDICATORS FOR GOAL 3

- ✓ Carbon footprint of ports

6.

THE NEW NATIONAL
PORT STRATEGY

Strategic objectives



GOAL 4

Ports as drivers of innovation and digital transition

so13

Support the emergence of digital solutions through a digital logistics platform.

Ports will move towards greater interoperability of information systems to manage the ship and cargo port of calls, which will not only facilitate port transit, but also position ports as catalysts to digitalise the logistics chain. System convergence will help towards the goal of merging cargo community systems (CCS) so that France has a single CCS to compete with foreign ports and in line with the requirements of the economic players who are customers of the ports. A first step towards this goal will be to make the two existing CCS fully interoperable as soon as possible.

so14

Use digital technology to smooth port transit by deploying a one-stop maritime shop for operators.

As the European Union aims to improve the reporting formalities related to port transit by linking the various one-stop shops of the Member States, the deployment of a new national maritime one-stop shop in line with the principles of "Tell us once" and "Paperless" will strengthen the competitiveness of the French ports.

so15

Ensure the digital resilience of ports.

Ports need to develop new services based on emerging digital technologies to be included in their digital roadmap, such as the 5G Network, the Internet of Things, blockchain or artificial intelligence and Big Data or the interoperability of port information systems for ship port of calls (Port Community Systems) and cargo transit (Cargo Community Systems).

Digitalisation is now a key competitive factor for ports. As operations become more digital, new issues and challenges arise in the area of cybersecurity. In addition to ships, the networks of IT systems managing ports of call, freight, passenger inspection, technical management or telecommunication systems, traffic supervision or even the control of infrastructure (bridges, locks, docks, etc.) are potentially vulnerable to cyberattacks. To address these risks, sharing the experiments and initiatives of the major seaports in the field of cybersecurity is becoming essential, as is relying on a structured initiative to unite the efforts of ports in this field and to pass on useful recommendations to the entire variety of ports, so that they can adapt their actions and develop and pool cybersecurity solutions at their own level. This is why the State is developing a good practice guide for cy-

bersecurity in the port sector, in line with the guidelines of the ENISA (European Union Agency for Cybersecurity) guide for managing cybersecurity in ports, placing French ports in a European cooperation framework.

so16

Define priority research themes and develop a national roadmap for port research and innovation.

This roadmap on the port economy and environment will make it possible to bring together research on ports and to better anticipate the major transitions and changes that will impact ports and their entire ecosystem, particularly the industrial sector.

KEY INDICATORS FOR GOAL 4

- ✓ Digitalisation rate of declarative procedures related to port transit

CONCLUSION

An operational and scalable strategy

A monitoring committee to ensure the implementation and progress of the national port strategy.

This monitoring committee, integrating public and private players, in conjunction with the regional port authorities and the Regions of France, will give ports a genuine ability to adapt to the developments seen globally and to adapt their economic model.

The application of strategic guidelines at port level thanks to appropriate performance tools: the goals and performance contract.

These tools will provide visibility to the major seaports on the structuring data of their financial and economic paths (operating grants for carrying out their sovereign duties, investment subsidies, level of dividends deducted, level of debt, etc.) and, in return, ensure that the ports commit to increased productivity and carry out an investment policy according to the guidelines of the national port strategy as soon as it is published.

7.

THE NEW NATIONAL PORT STRATEGY

Roadmap of initial actions



GOAL 1

Ports as essential links in the performance of logistics chains

action

1

Continue transforming the ports' **economic model** to give them more self-financing capacity for their development projects and to speed up the ecological transition of the major sea-ports through the port budget (€175 million) of the maritime recovery plan, in addition to the State-Region plan contracts.

Lead: Directorate-General for Infrastructure, Transport and the Sea

Schedule: 2021-2022

action

2

Establish more **new traffic-generating activities** in the industrial port zones and test out innovative drivers within the ports to attract businesses, particularly in the ecological transition sector. A project will be launched in the first half of 2021 to identify the public policy levers to be used in order to define the economic model for alternative fuels in ports (in particular shore-side electricity) and to support the ecological transition of companies who are already established in the port area, as well as to remove obstacles for new companies setting up in the industrial port zone with a sustainable development approach.

Lead: Directorate-General for Infrastructure, Transport and the Sea

Schedule: 2021-2022

action
3

Create a monitoring centre for the performance of ports and logistics chains.

A preliminary 2020 version of this monitoring centre has been finalised and presented to the State departments concerned and to the professional organisations that have contributed to this project. The scope and outreach of this monitoring centre will then be consolidated at the end of these progress meetings.

Lead: Directorate-General for Infrastructure, Transport and the Sea

Schedule: early 2021

action
5

Promote the advantages of the French port and logistics offer internationally by developing a partnership with Business France and strengthening the influence of French ports at international and European authority level with the aim of influencing regulatory decisions and funding mechanisms and defending French interests in terms of the conditions of competition with foreign ports.

Leads: Directorate-General for Infrastructure, Transport and the Sea and Business France

Schedule: 2021

action
4

Create a single point of contact.

The France Sesame project, led by the Directorate-General of Customs and Indirect Taxes, together with the Directorate-General of Food, the Directorate-General for Competition Policy, Consumer Affairs and Fraud Control and the Directorate-General for Infrastructure, Transport and the Sea, consists of creating a digital simplified trade platform for procedures related to the transit of goods through ports. France Sesame will make it possible to create a single point of contact at the borders of Le Havre, Dunkirk and Marseille, to ensure a significant increase in performance and legibility for border formalities and to optimise the overall processing time for physical operations, with a view to possible extension to other ports if the experiment is successful.

Leads: Directorate-General of Customs and Indirect Taxes, Directorate-General of Food, Directorate-General for Competition Policy, Consumer Affairs and Fraud Control

Schedule: during 2021



7.

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PORT STRATEGY

Roadmap of initial actions

GOAL 2

Ports as agents of economic development

action

6

Strengthen the development role of ports by anticipating and facilitating economic activities being set up in industrial port zones, relying in particular on the proposals in the report by Deputy Guillaume Kasbarian on the provisions of the bill to simplify the associated administrative procedures and on the action of Team France Invest.

Leads: Directorate-General for Infrastructure, Transport and the Sea in conjunction with the Directorate-General for Planning, Housing and Nature

Schedule: End 2020 (bill to accelerate and simplify public action)

action

7

Create port, logistics and development training courses adapted to the ecological, economic and digital transitions of the industry and work comprehensively on the appeal of port, maritime and logistics professions. A partnership will be developed with the Ministry of National Education (through agreements) to better integrate the knowledge and skills specifically required in the port sector into initial training courses, particularly those leading to port-related jobs. Guidance tools (Onisep, job descriptions, regional guidance policies, etc.) will be used, with an emphasis on encouraging women into the profession, and the port players will participate in the maritime employment week organised by Pôle emploi. Meanwhile, innovative training actions on emerging fields and new specific

needs in university curricula will be developed and the change in professions in the face of ecological, economic and digital transitions will be supported. The development of maritime modules in certain interdisciplinary training courses will be encouraged, to promote these professions throughout the training sector, at all qualification levels.

Leads: Minister of Higher Education, Research and Innovation, General Delegation for Employment and Vocational Training, Ministry of National Education, Youth and Sports

Schedule: 2022

action

8

Provide reliable and competitive rail and waterway freight solutions, broken down by route and based on a core network of multimodal platforms. Pre- and post-carriage port services will be taken into account in the national strategy for rail freight and in the waterways and rail recovery plans.

Leads: Directorate-General for Infrastructure, Transport and the Sea; in conjunction with Voies Navigables de France and SNCF Réseau

Schedule: 2020-2022



GOAL 3

Ports as catalysts for the ecological transition

action

9

Define a "port ecological transition" plan in each major seaport.

A section of the port ecological transition plans of the major seaports will deal with the circular economy and industrial ecology. These plans will include a roadmap for the deployment of alternative fuels by 2025. Overall plans for biodiversity management will be introduced in ports or continued for those that already exist.

Leads: each major seaport

Schedule: upon publication of the strategy and over the period of the ports' strategic projects

action

10

Create an ecolabel for logistics flows passing through French ports to enhance the value of all ethical logistics chains that use French ports. An initial feasibility study phase began in October 2020 and will be completed in the first quarter of 2021 with the definition of the label's scope and standards.

Lead: Directorate-General for Infrastructure, Transport and the Sea

Schedule: launch of the study in 2020, testing of the ecolabel at the end of 2021



Roadmap of initial actions

GOAL 4

Ports as drivers of innovation and digital transition

action 11

Speed up the emergence of digital solutions to simplify and accelerate port transit.

- For ships: implement a maritime one-stop shop, based on the principles of "Tell Us Once" and "Paperless" by 2025 (European one-stop shop provided for in Regulation (EU) 2019/1239). This action complements the national one-stop shop for customs clearance (GUN) projects, led by the Directorate General of Customs and Indirect Taxes and the SES/ETIAS approach led by the Ministry of the Interior (reform of controls on entry to and exit from the Schengen area with the deployment of tools such as SAS PARAFE adapted to ro-ro traffic in ports).
- For goods: promote digital logistics platforms and cooperation between the main national publishers of digital solutions with the short-term objective of optimal interoperability and the ultimate goal of merging the two CCS. The public authorities have acknowledged the creation of GIE France PCS (a digital platform that aims to facilitate data exchanges between players in the

logistics chains) announced in December 2020 by the two French publishers SOGET and MGI, which could be an initial response to the imperatives of convergence and interoperability of IT systems, as defined by the Government at the last interministerial committees on the sea (CIMER). With time, this convergence should lead to a unified system that will make port transit in French ports smoother and improve the tracking and management of goods, thereby making French ports more attractive than their foreign competitors.

Leads: Directorate General for Infrastructure, Transport and the Sea, Directorate General for Enterprise, General Council of the Environment and Sustainable Development, General Council of the Economy, France logistique, publishers

Schedule: 2020-2025

action
12

Encourage, with the support of the France Cyber Maritime association, the development of cybersecurity solutions (securing PCS and CCS, smart grids being created, etc.) within the framework of the recovery plan and the cybersecurity acceleration strategy led by the Directorate General for Enterprise. A best practice guide in the field of port cybersecurity will be developed, in line with the ENISA (European Union Agency for CyberSecurity) guidelines. The guide is currently being finalised and should be made available in early 2021.

Leads: *Secretariat-General for the Sea, Comité France Maritime, Directorate General for Enterprise, Directorate-General for Infrastructure, Transport and the Sea (Cyber Guide)*

Schedule: 2020-2021

action
13

Develop digital tools for port performance, securing logistics chains and innovation.

The skills and experience of those responsible for digital technology in the ports will be pooled within a community that will be set up to accelerate change and prepare the "port of the future".

Leads: *major seaports*

Schedule: 2021

action
14

Bring together a national port research community in charge of developing a national vision for port research and innovation and suggesting actions to enhance and develop cooperation between research and ports. This community will be led by a workshop bringing together, in addition to the CNRS and the DGITM, the Minister of Higher Education, Research and Innovation, the Ministry of the Sea, the National Research Agency, in connection with the inter-regional or regional research communities already in place (port and logistics routes, Euralogistics, etc.)

Leads: *French National Centre for Scientific Research, Directorate-General for Infrastructure, Transport and the Sea*

Schedule: *launch in the second half of 2020*

THE NEW NATIONAL PORT STRATEGY

Monitoring and governance

action
15**Establish a monitoring committee for the national port strategy.**

This monitoring committee for the national port strategy, with the support of the Minister of Transport and the Minister of the Sea, in conjunction with the Secretariat-General for the Sea, will bring together the Regions of France, the port authorities of the State and decentralised ports, the port and logistics sectors, the network operators (SNCF Réseau, VNF, CNR), France Logistique, as well as the trade federations (Union des ports de France, Union nationale des industries de la manutention, French Maritime Cluster, Maritime and Port Union of France, French Federation of Maritime Pilots, Armateurs de France, Association of Freight Transport Users, Union of Transport and Logistics Companies of France-Overseas, Agents maritimes et consignataires de France, Waterway Companies of France), the Secretariat-General for the Sea and the ministries concerned (Economy, Finance and Recovery, Overseas, Europe and Foreign Affairs, etc.). This committee will report to the

Interministerial Committee on the Sea (CIMer), the Interministerial Committee on Logistics (CILOG) and the Ministerial Committee on Development and Innovation in Transport (CMIDT). The work of the monitoring committee will also support the work of the Conseil Supérieur de la Marine Marchande (CSMM) and the Comité Maritime État-Régions. The Directorate-General for Infrastructure, Transport and the Sea (DGITM) will serve as the secretary to this monitoring committee.

Leads: Ministry of Transport,

Ministry of the Sea

Schedule: during 2021

action
16

Provide all major seaports with a goals and performance contract, in connection with planning documents (CPER in particular).

Leads: Directorate-General for Infrastructure, Transport and the Sea with support from the Budget Directorate, Agence des Participations de l'État

Schedule: during 2021



GOVERNEMENT

Liberté
Égalité
Fraternité