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# **Monitoring economic impact and modal backshift**

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**Report to ESSF Plenary - Brussels, 26 June 2014**



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## Context and aim

- **Art 7.2. EU Sulphur Directive includes obligation to report on potential economic impact and observed modal shift**
- **Potential impacts of increased shipping costs:**
  - Shift to other transport modes in the ECA
  - Shifts from long to shorter sea routes
  - Cruise lines avoiding ECA destinations
- **Short term aim: monitor impact for priority sectors as of autumn 2014, reporting at regular intervals**
- **Medium term aim: comprehensive analysis in 2015**



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# Short term approach



## Specific methodologies

### ► **Fixed routes:**

1. Identification sensitive routes
2. Survey among operators on these routes
3. Complementary info from ports & shippers

### ► **Cruise market NW Europe:**

- CLIA Europe, with complementary info from Cruise Europe (NW European cruise ports)

### ► **Short sea spot markets:**

- Survey among operators on spot markets, and/or
- Survey among shippers



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## Timing

- **Establish methodology over summer**
- **Test-run survey(s) September 2014**
- **Launch survey October / November 2014**
- **Quarterly updates**



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# Recommendations

- 1. ESSF Plenary supports the envisaged (short term) monitoring and (medium term) analysis exercise.**
- 2. ESSF industry members should commit to participating in the monitoring and analysis exercise and, especially, provide information to the survey(s).**



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