



## **The European Tugowners Association response to the Call for evidence on the European Maritime Industrial Strategy.**

The European Tugowners Association (ETA) welcomes the European Commission's initiative to develop a comprehensive European Maritime Industrial Strategy. The European shipbuilding and equipment manufacturing sector plays a vital role in strengthening Europe's industrial base and maritime capabilities. It is not only a cornerstone of technological innovation and sustainability but also a key enabler of strategic autonomy for the continent. This industry holds particular significance for the towage industry, as it underpins the entire maritime supply chain. From the construction of high-performance vessels to the provision of specialised equipment, the shipbuilding sector ensures that towage services remain efficient, safe, and resilient.

The European Maritime Industrial Strategy should focus on the shipbuilding manufacturing industry, benefiting the entire ecosystem in terms of competitiveness, sustainability, and resilience. It should focus on ensuring that Europe is the leader in manufacturing state-of-the-art vessels, powered by the latest green and digital technologies. Given the interconnected nature of the waterborne sector, ship owners should be provided with incentives such as tax breaks and financial aid to purchase vessels and equipment that are partly or wholly manufactured in Europe.

Tug boats have for many years been manufactured in Europe, and European owners would purchase them in Europe. However, unfortunately, this is now on the decline due to more favourable prices in Asia. Nonetheless, most of the state-of-the-art equipment and innovation still happen in Europe.

### **Targeted support for Shipbuilding and Shipowners**

To ensure Europe's maritime sector remains globally competitive and strategically resilient, the ETA recommends targeted support for the shipbuilding and maritime equipment manufacturing industries. These sectors are essential not only for innovation and sustainability but also for the operational strength of the towage industry and the broader maritime supply chain.

ETA emphasises the need for comprehensive support, which includes access to finance. Simplified pathways to both public and private funding, whether through banks, investors, or capital markets, are critical to enabling growth and innovation.

ETA also calls for a regulatory environment that supports innovation and manufacturing. This means creating frameworks that encourage calculated risk-taking in new technologies, streamline smart production processes, and facilitate access to raw materials and skilled labour.



ETA advocates for a regulatory framework that actively steers the maritime market toward sustainable, digitalised, and circular practices. Current market conditions offer limited incentives for the adoption of cleaner propulsion systems and alternative fuels, an imbalance that must be addressed to accelerate the sector's green transition.

ETA recommends the development of a coherent set of incentives designed to attract shipowners, including tugowners, to place orders within Europe. While financial incentives are important, policy efforts should also focus on fostering non-price competitive advantages that benefit both shipowners and shipbuilders.

## **Positioning Europe as a Global Leader in Green and Advanced Maritime Technologies**

ETA believes that Europe's shipbuilding and maritime equipment manufacturing sectors must be empowered to become global leaders in green technologies and state-of-the-art equipment, particularly of specialised vessels and vessels of strategic importance. This leadership is not only essential for achieving the EU's climate and digital goals, but also for ensuring the long-term competitiveness and resilience of the European maritime industry.

To achieve this, Europe must foster an environment that supports innovation in both newbuilds and retrofitting. The ability to retrofit existing vessels with advanced, sustainable technologies is just as critical as building new ones. Indeed, for the towage sector, retrofitting is particularly important. It allows for faster decarbonisation of the fleet, extends vessel lifespans, and ensures compliance with evolving environmental standards.

ETA calls for coordinated policy and financial support to:

- Accelerate the development and deployment of clean propulsion systems, energy-efficient designs, and smart maritime technologies.
- Promote retrofitting as a strategic pillar of the green transition, with dedicated funding and technical support.
- Strengthen Europe's industrial capacity to deliver high-quality, future-proof vessels and equipment that meet the needs of a modern, sustainable maritime sector.

## **Recognise Towage as a Strategic Asset for Safety, Security and Environmental Protection**

Towage vessels are indispensable for the safe and efficient manoeuvring of ships in and out of ports, particularly in adverse weather or congested conditions. They are also frontline responders in emergency situations, contributing to environmental protection and maritime security. Indeed, towage services play a vital role as first responders in port emergencies, including firefighting operations, where their rapid intervention can prevent escalation and protect both human lives and infrastructure. They are also on the front line in responding to



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environmental threats such as oil spills, deploying containment and recovery measures to mitigate ecological damage and support maritime sustainability.

In times of heightened geopolitical tension, harbour tugs play a critical role in safeguarding port infrastructure and ensuring operational continuity. Their ability to manoeuvre large vessels quickly and precisely becomes vital for enforcing rapid port closures, rerouting traffic, or evacuating high-value or vulnerable assets. Tugs can also assist in the controlled docking and undocking of military or humanitarian vessels under tight security protocols, ensuring that strategic maritime operations are not delayed. Moreover, in the event of sabotage, blockades, or attacks on navigation systems, tugs provide a reliable, manual fallback for vessel movement, reducing dependency on potentially compromised digital systems. Their presence enhances the port's resilience and responsiveness, making them an indispensable asset in national and regional security planning.

As such, towage should be explicitly recognised alongside military vessels, dredgers, and icebreakers as a strategic maritime asset. Strengthening the European supply chain for the production, maintenance, and repair of these vessels, including engines, winches, and control systems, will ensure that Europe retains sovereign capabilities in critical port infrastructure.

The European Maritime Industrial Strategy should ensure that strategic assets, such as tugs, dredgers and icebreakers, also benefit from the European Defence Industry Programme and Readiness 2030.

Early-stage innovation is vital for towage operators exploring alternative propulsion systems, whether hybrid, hydrogen, methanol, or electric. These operators often face high upfront costs and uncertain returns. EU funding could play a transformative role by supporting pilot projects, retrofitting existing fleets, and investing in the digitalisation of towage operations.

## **Maintaining a Strategic Inventory of Spare Parts for Strategic Vessels**

Strategic maritime assets must remain readily deployable at all times to safeguard the safety, security, and operational continuity of European waters and ports. European Towage operations rely on a fleet of highly specialised vessels that must be available at a moment's notice. Any unplanned downtime, whether due to mechanical failure or other reasons, can have cascading effects on port logistics, vessel schedules, and overall supply chain efficiency.

To mitigate these risks, it is crucial to establish and maintain a strategic inventory of spare parts for strategic assets, including tug boats within Europe. This includes critical components such as propulsion systems, winches, control electronics, and emissions-reduction technologies. By doing so, Europe can:

- Reduce dependency on non-EU suppliers, particularly in times of geopolitical tension or global supply chain disruptions.



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- Ensure rapid repair and maintenance, minimising vessel downtime and maintaining the continuity of port operations.
- Support local manufacturing ecosystems, reinforcing Europe's industrial base and creating skilled jobs in maritime engineering and logistics.
- Enhance resilience and autonomy, aligning with broader EU goals of strategic sovereignty and critical infrastructure protection.

For the towage sector, where reliability, responsiveness, and safety are non-negotiable, this approach is not only beneficial but also essential. It ensures that Europe's ports remain operational and secure under all circumstances, from routine operations to emergency response.

### **A human-centric approach**

The European Maritime Industrial Strategy should also have a human-centric approach, where reskilling and upskilling of the current workforce is also addressed. The Strategy should include instruments to attract young European workers to the shipbuilding and equipment manufacturing sectors, but also within the shipping sector. It should support those already in the industry by continuing to develop both traditional and technological skills. As maritime technology advances, collaboration between cutting-edge technology and human expertise will be crucial in addressing the challenges ahead and achieving sustainable maritime practices. In this context, targeted efforts to reskill and upskill the workforce are essential, not only to keep pace with the digital and green innovation.

The European Tugowners Association (ETA) stands as the sole voice of the towage sector in Europe, representing over 75% of all harbour tugs operating in European ports. Established more than 60 years ago, ETA has consistently championed the interests of the industry and remains the only organisation of its kind representing towage at the international level.

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