

Mitigating the maritime Belt and Road Initiative's environmental impacts

Solution overview for shipping companies

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INTRODUCTION

The shipping sector is going through a period of great transformation. Even if it is broadly considered the least polluting form of transport, ecological pressures are increasing more and more, having consequences on various levels, including both on the environment and on human communities.

The Belt and Road Initiative, being an extensive project intended to intensify and further increase global trade through massive infrastructure investments, is expected to exacerbate such impacts.

In order to effectively tackle these issues, we wrote the following White Paper, addressed to the major shipping companies involved in the Belt and Road Initiative. The intention is to provide them with some concrete solutions to face the challenges illustrated in the report.

We have selected shipping companies as the recipients because of their global presence. They benefit from a privileged point of view of the market, as they are in a position to have concrete impacts on the BRI maritime routes (globality is probably the most illustrative characteristic of the BRI). Furthermore, due to their core economic activity, shipping companies incorporate a lot of information and different environmental standards applied worldwide, allowing them to be the real game changers in the market, both at ports and at open sea level.

After a brief overview of environmental and human outcomes via our DPSIR methodology, we, therefore, illustrate some strategic, operational, and technological solutions to these corporates. The intention is to provide concrete tools for the creation of a more sustainable shipping industry, that should go through protecting the environment and oceans, as well as local communities and more broadly all the stakeholders involved. Some business benefits from their application are also included in this White Paper, in order to make the implementation of such solutions more economically attractive for shipping companies. Nevertheless, we acknowledge that economic incentives shouldn't be the major force of change for these corporates, as a greater effort is needed that goes beyond the business logic of profit and a "short-termism" mindset. That is why we concluded our White Paper with a final call to action.

SHIPPING OUTCOMES ON ENVIRONMENT

We decided to use the Driver-Pressure-State-Impact-Response methodology to address the subject of China's Belt and Road initiative's impact on the environment and inevitably on humans.

- Ports building and extension
- Ports activity
- Ships lifecycle
- Shipping

Drivers

- Noise
- Species migration disturbance
- Intrusion in marine eco-systems
- Dredging and dumping
- Disturbance and abrasion of seabed
- Coastal land use change
- Transfer of non indigenous species and aquatic pathogens
- GHG and air pollutants emissions
- Ballast, black, grey waters and other discharges from ships
- Antifouling components leaching
- Marine litter from ships and port (oil, lubricants)



Gwadar port



BRI maritime roads



Lamu port

Pressures

- Masking of marine species acoustic communications
- Establishment & spread of non-indigenous species
- Climate change
- Acid rains & oceans' acidification
- Increased levels of NOx, SOx, PM and ground level ozone in the air
- Collision with species and coral reefs
- Increase of nitrogen level in the water
- Increase of litter and pollutants in the sea
- Increase of suspended matter in the ocean, burial of benthic organisms
- Change in seabed substrate and morphology
- Coastal abrasion
- Destruction of mangroves ecosystem & seagrass habitat
- Increase of noise level in ports areas



Dredging & dumping



Ballast water discharge



Emissions & pollution

State changes

- Extreme weather event and others climate change outcomes
- Coastal Erosion
- Eutrophication
- Loss of seabed habitat and ecosystem
- Behaviour change, injuries, increased stress and death of local species
- Decrease of indigenous species populations
- Change in the trophic chain
- Change in ecosystem balance



Coral reef damage



Suspended matter



Acoustic disruption

Impacts

AND ON HUMANS



Jobs creation (port related or indirectly)

E.g COSCO is estimated to create 125,000 jobs in Port of Piraeus until the new concession agreement expires in 2052.



Local economy boost for port cities

E.g. Gwadar Smart City Master Plan estimated local population growth from 200 thousand to 2 million in the coming years.

Business and trading opportunities for BRI countries.

World bank estimates that BRI transport projects could increase trade between 1.7 and 6.2 percent for the world, increasing global real income by 0.7 to 2.9 percent.

Populations displacements and dispossession

E.g. Project conflicts with local communities in Lamu, Kenya; Piraeus, Greece.

Loss of eco-tourism income

Loss of fishing income

Unsafe marine food supply

Air pollution

Destruction/pollution of marine coastal habitat, disruption of trophic chain and eventually fishing yields.

E.g. the depositing of polluted sediment in the Saronic gulf by COSCO



Noise disturbance from ports for nearby residents.

E.g. noise complaints in ports of Malte and Marseille

Potential fossil-fuel-based energy plants developed for increasing energy demand

E.g Chinese fossil fuel investments pre-2021, like in Lamu Kenya.

Accrued Risk of Debt

E.g. Growing accumulation of domestic debt in China leading to a decrease in FDI. 60% of China's overseas loans in 2022 are held by countries in financial distress, versus 5% in 2010. Increased debt abroad resulting in long-term land concessions (99 year lease in Colombo port in Sri Lanka).

STRATEGIC SOLUTIONS

To better address our maritime environmental concern highlighted with our DPSIR analysis with strategy planning answers, the focus of this part will raise the topic of cooperation with stakeholders as a main solution to implement within shipping companies' strategy, vision and environmental goals definition. This aforementioned cooperation strategy can be tailored around three scopes local communities with port authorities, international agency and multi stakeholder initiative groups.

Local communities include various stakeholders, mostly at regional scale, that have close business, political and economical links with shipping companies activities in their active location. Surveying and integrating them into the decision making process and monitoring process, especially considering the harmonisation of business activities and communities demands regarding corporate and social responsibilities. The latter can be approached from both upside and downside perspective with companies seeking better exposure and also competitive advantage from going beyond rules and regulation with leading management systems. This would help consolidate the brand and employee loyalty, adhering to profit sharing policies with profit redistribution to NGOs like Save Lamu in Kenya for instance, increasing transparency and consistency in both internal and external reporting and information sharing of highly market competitive ESGs. These strategies also include the major stakeholder that port authorities constitute by their regulatory weight with their governance over Portugal land, terminal operators and other service providers. More inclusive joint strategies will help improve port' performance with the goal for shipping lines to be satisfied in their needs (capacity, time, etc), streamlining port operations within shipping companies' transport chain and the possibility to solve environmental issues together. This can be possible with cooperation in resource sharing with mutual costs benefits and risk reduction for new infrastructure projects such as BRI. Better cooperation between those active stakeholders also contribute to reducing destructive competition.

IMO, as the global authority for international shipping regulation, works to implement environmental performance policies but the process is long as maritime conventions are not binding until it is enforced after countries ratifications. The minimum of state ratifications is also coupled to a requirement regarding the percentage of the world's merchant fleet that they represent: entry into force of a convention IMO usually takes several years following its adoption. On the scope of GHG emissions for instance, IMO targets are estimated to be not ambitious enough: in November 2022, as according to its strategy the objective is to reduce the carbon intensity from shipping by at least 40% by 2030 compared with to 2008. Shipping companies are therefore expecting more ambitious targets, as well as more stringent policy instruments supporting strategies. This would help them to stabilize future market standards and trends, leading to possible gain of competitive advantage by the time new policies become effectively enforced. Such anticipation practices are therefore supported and should become a main subject from collaboration between shipping companies and IMO.

These dynamics can be the key to the implementation of new technologies and alternative fuels that are already available on the market but not at the industrial scale since their implementation does not align with short-term economic benefits yet. With the market shifting slowly but surely toward a more sustainable scope, new economic opportunities and environmental benefits can result from pioneer positioning in those markets such as fleet updates. Furthermore, a relevant flagship in the sustainable development field is the EU policymakers. Their legislation is often characterized as being leading, more ambitious, and more restrictive than IMO's own directives making the application of their directives a good anticipation of IMO's future conventions. This action will also leverage the widespread global presence of European major shipping companies, already familiar with EU directives.

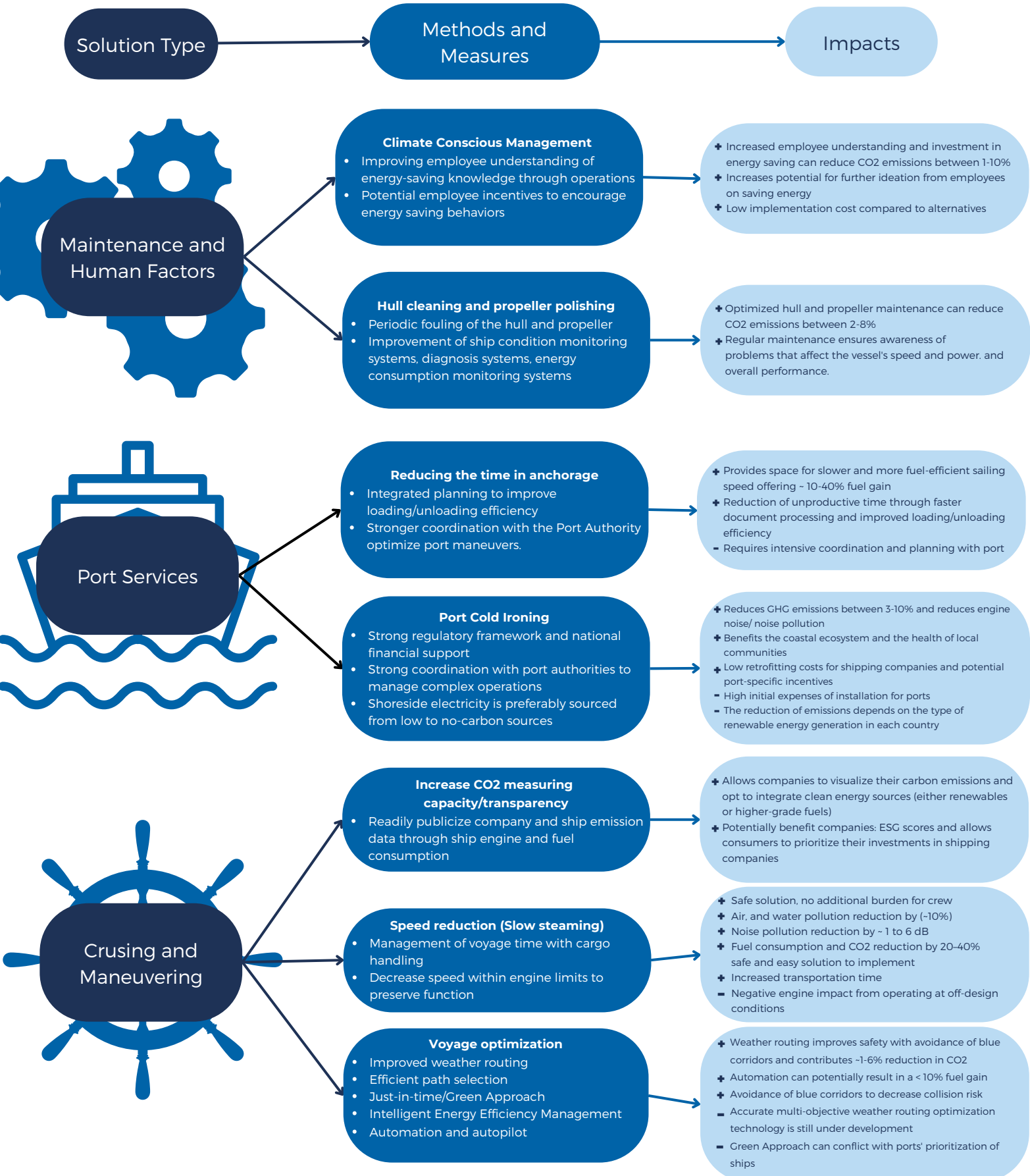
Multi-stakeholder initiatives, such as the Sustainable Shipping Initiative (SSI), regroup ambitious and like-minded leaders driving change through cross-sectoral collaboration to contribute to and thrive in a more sustainable maritime industry. Collaborating through joining such an initiative would help maintain communication and discussion between the members such as Maersk, WWF, Swire Shipping, etc. A consistent and collaborative schedule can be set regarding best practices both on the economic and environmental side of the business, with "good students" leading the others. SSI can therefore pilot shipping companies towards green shipping, where management and technology can be accomplished. Considering inter-shiping companies collaboration is substantial for management and implementing shipping companies technologies for opposing greater impact such as environmental ones.



New collaborative strategies developed will create a context for information-sharing tools to be developed with mutual funds such as private or public cloud-based platforms as an example multi beneficial result from increasing information sharing between all the aforementioned stakeholders. Therefore, implementing those strategies or strengthening them within the shipping company's vision will be key to addressing the environmental dilemma.

OPERATIONAL SOLUTIONS

Reducing the negative impact of Maritime BR shipping on ecological resources requires a combination of strategic and technical solutions. Due to the lower cost and logistical approach, often strategic solutions are ideal achievable steps to take before investing in new technology. Some of the strategies listed below are already being implemented, by shipping giants like COSCO, whilst others are still in development. In reducing CO2 emissions each strategy also has the potential to reduce operational costs and to benefit planned furans in 2022 and companies in anticipating a carbon credit/ offset scheme (as planned for Europe in 2023 and possibly expanding globally)



TECHNOLOGICAL SOLUTIONS

Shipping companies, as main customers of shipbuilding companies, have the power to incentivize R&D (EEDI, CII and EEXI optimization) and eco-design when expressing technical requirements. They can also require shipbuilders to follow IMO non-binding regulations such as the guidelines for the reduction of underwater noise from commercial shipping to address adverse impacts on marine life. Indeed, environmental regulations are tightening over time. Requiring ship disruptive technologies development will not only help shipping companies to be ahead of future regulations, but will also allow them to remain competitive and significantly decrease their environmental impact.

Carbon capture on board

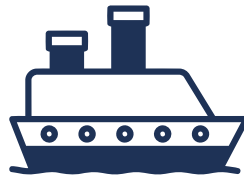
Adsorption approach

(Seabound)

- + Captures up to 95% of CO2 emissions
- Reduction of the cargo capacity (1-5%)

Solvent-based approach

- Filters sulphur, ultra-fine particulates and CO2
- + Plug and play system
- 100% circular solution
- Not scaled for big trading ships yet



Antifouling

Physical (Finsulate)

- Using spiny surfaces to prevent organisms from clinging to the hull of a boat.
- No chemical release in the ocean
- + 100% recyclable
- 5 years lifespan
- Maintenance needed
- Hasn't proven to work perfectly

Non-biocidal lower roughness antifouling coating

- 63.6 t of CO2 emission reduction per route for bulk carrier (~5400\$ savings)*
- + Return on investment ~ 1.5 - 3 years
- No leaching of toxic compounds
- More research needs to be done

Ship & propulsion design

Advanced materials

- + Weight reduction, reducing up to 22% CO2* Noise reduction
- Price

Free or reduced ballast ships

- + Up to 10% CO2 reduction*, smaller risk of non indigenous species spread
- Not scaled for big trading ships yet

Waste Heat Recovery (Rankine cycle)

- Energy consumption reduced by valorising heat exchanges of exhaust gas and cooling water
- +

Hull Hydrodynamics (design, forms, coating, air film lubrication)

- Speed increase, less resistance
- + Up to 30% CO2 reduction* Noise reduction

Water rotational energy recovery systems

(stator-fins, contrarotational propeller, contracted & loaded tip propeller)

- Up to 10% CO2 reduction*
- + Improve overall ship efficiency
- Reduce cavitation, vibration & noise
- Reliable and low-cost retrofit

Advance sewage system

- + Anticipating future MARPOL convention strengthening.

Alternative energy

Alternative fuels

- + **Green Ammonia:** no carbon footprint when combusted
- Ammonia is very toxic and has a high environmental impact when leaked. Nitrogen dioxide and NOx are byproducts of combustion (but avoidable if a fuel cell is used).
- + **Green Hydrogen:** potential for the lowest emissions from the combustion process
- Fuel prices are extremely high and hydrogen requires a very low storage temperature
- + **Methanol LNG:** biodegradable, clean-burning fuel type. Up to 30% reduction in GHG compared to HFO. Technology is readily available.
- Methane leaks from methane slip contribute to 4x higher GHG potential than CO2.
- + **LPG:** comply with IMO's new sulfur regulations from 2020. 20% reduction in GHG emissions. LPG is an ideal transition fuel with readily available technology
- Safety concerns with lower combustion temperature of LPG
- + **Nuclear propulsion:** reducing emissions such as CO2 and replacing fossil fuels.
- Radiation hazards pose a safety concern and require highly trained personnel.
- Obstacles to overcome with international and local nuclear regulations
- Wind power** (OcenBird, AirSeas)
 - Rotor sails or flattener rotors are spinning cylinders that use the changes in air pressure to propel the vessel
- + Reduction of fuel consumption (from 10 to 20%) & air, water and noise pollution
- Intermittent energy source

*due to fuel savings

BUSINESS BENEFITS

Shipping companies may benefit from some advantages for the company growth and development if they apply these different measures: strategic, technological and operational solutions. Moreover, this will consequently mitigate the shipping intensification due to the BRI development.

In the previous part, several types of solutions have been introduced. They all represent possible paths to reduce shipping environmental and human impact: short or long-term, reliable or risky, and low-cost or expensive investment solutions.

Shipping companies face many challenges in integrating low-carbon policies and limiting their impact on biodiversity. A combination of some of the proposed solutions above, over a long range of time, is the solution for a more sustainable industry. However, shipping companies will have interested in implementing these changes in the near future.

Indeed, some solutions provide cost savings in the short or long term, competitiveness, and help gain a positive reputation.

Indeed, the proposed solutions are not all costly and don't require important investments. For example, new propeller technologies and LNG-fuel engines are reliable technologies, and they allow the reduction of CO₂ by 30% and fuel saving in a short-term vision. They do not represent any financial or technical risk other than those existing for basic fuel engines.

Shipping companies are encouraged to anticipate changes in the new regulation. IMO is intensifying its efforts to decarbonize the shipping sector. New mandatory rules were introduced in November 2022 to reduce the carbon intensity of international shipping by at least 40% in 2030 compared to 2008 levels. Therefore, shipping companies will need to adopt disruptive technological solutions to be in line with the regulation under penalty of sanctions or to pay the bill of technological delay later. Besides, regional emission trading schemes, such as the EU and China, are considering the inclusion of the shipping sector into their schemes for carbon emissions. Shipping companies could benefit by planning an optimal investment strategy to anticipate the rise of the carbon price. This will lead to changes towards environmentally sustainable emission-free solutions with a positive net present value, the possible payback time for the investments should be short as well.



As the general public becomes increasingly aware of the deleterious impacts of shipping on the environment, through oil spills, nearby port inhabitants' discontent and organized cetaceans strikes, implementing eco-friendly measures in shipping companies' business could help to get a better reputation from civil society but also customers.

Besides, the implementation of new technologies will allow a decrease in chemical pollution in the oceans. The companies will benefit from a favorable public opinion and that will improve their visibility and attractiveness. Investing in new technologies will also lead to less atmospheric pollution in port cities, which is a good attribute for public opinion. It should also be noted that the setup of tools to allow noise reduction may have a positive impact on marine species' behavior. This is a good thing to attract customers who are kind on biodiversity matters and therefore enhance the good reputation of the company.

Also, many social studies have demonstrated the increasing need in society to find meaning and impact in their job position. It is always more fulfilling to work in a modern company whose strategy is oriented toward solving social and environmental issues. Thus, implementing solutions for a less carbonized and biodiversity-harmful industry will convince new talents to join shipping companies or current employees to pursue their careers within the company.

Finally, the improvement of communication among the different maritime trade stakeholders is equally fundamental. However, it depends on a well-functioning process and the quality of the interactive process. The relevance of enhanced networking on technical and procedural issues plays a key role in the management of environmental issues throughout the entire process. It, therefore, contributes to a better way to do business. Besides, greater transparency and better cooperation will lower the reputational risk of the company.



SUMMARY

This White Paper has been written with the intention of assisting our main recipient, the shipping companies, to minimize the impacts that have previously been discussed.

The solutions that have been proposed have been made with the thought in mind of not only presenting potential monetary savings for the shipping companies and improving their public perception but also, more importantly, finding ways to protect the environment. These solutions have been divided into strategic, operational, and technological.

The strategic solutions focus on highlighting the importance of shipping companies to increase cooperation with other stakeholders whether they are international or local groups. The operational solutions are targeted at the maintenance and human factors, port services, cruising, and maneuvering aspect. The technological solutions proposed are carbon capture on board, ship and propulsion design, antifouling, and alternative energy implementation.

These types of solutions should be implemented and intertwined with each other in order for shipping companies and the environment to benefit from these measures. Some of these suggestions can be easily implemented while some are more challenging, some of them are low cost while some are expensive, and some of them can show results in the short-term while others in the long-term.

However, regardless of the many factors a company might need to consider before implementing any change to its way of doing business, we strongly believe that it is in the best interest of the shipping companies to start and keep making the proper adjustments to be on track with the decarbonization and mitigation path not only because they have to follow regulations from the IMO but also because of the sense of responsibility that we owe to our common home.

CALL TO ACTION

“Fight now for a new dawn.”

Fight now for the world, human health, sea life, and nature. Fight now for a brighter future for your beloved people. We have the power, ability, and will to make our beloved ones live better without natural or health disasters. It's time to start adaptation and mitigation for a healthy and free-of-disaster life before it's too late. We present you a variety of solutions to reduce the impacts of the maritime Belt and Road Initiative on biodiversity, climate, and humans. For more information on the ways and solutions, please contact one of the ENVIM students.

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