BRIEFING

EU Ports Strategy – Key Pillars on strengthening EU Ports

On 4 March 2026, the European Commission adopted the **EU Ports Strategy**, setting out a long-term policy framework for strengthening the role of European ports in global trade, the energy transition and supply chain resilience.

You will find the strategies and related press material on the dedicated webpage.

Ports are recognised as critical infrastructure for Europe's economy and strategic autonomy, acting as the interface between maritime transport, inland logistics networks, energy systems and industrial ecosystems. Today, EU ports handle around 74% of the EU's external goods trade and more than 3.4 billion tonnes of cargo annually, underlining their central role in European supply chains.

The strategy reflects growing geopolitical, economic and environmental pressures affecting global trade routes and logistics networks. It therefore aims to strengthen the **competitiveness, security, sustainability and connectivity of the European port system**, while ensuring that ports can support the EU's broader economic and industrial objectives.

The strategy is structured around five key pillars, each accompanied by a set of actions for the European Commission, Member States and industry stakeholders.

Pillar 1 – Strengthening Competitiveness, Innovation and Digitalisation

The first pillar, for CLECAT the most relevant pilar, focuses on maintaining the **global competitiveness of European ports** in an increasingly competitive international environment. EU ports face growing competition from major global port hubs, particularly in neighbouring regions where regulatory conditions, investment strategies and operational costs may differ significantly. To address this, the strategy emphasises:

o **Functioning internal market and Fair competition**

Earlier draft versions of the strategy reportedly contained stronger language warning that vertical integration could lead to market foreclosure, potentially restricting access to port infrastructure and services for operators upstream and downstream in the logistics chain. These concerns reflected concerns from CLECAT and FEPORT regarding the growing concentration of market power as major shipping lines expand their activities across terminals, inland logistics services and digital platforms.

In the final version of the strategy, the wording has been softened. The text emphasises that vertical integration may also bring operational efficiencies and investment benefits. The strategy stresses that **fair competition between operators must be preserved**, in line with EU competition and merger rules.

The Commission indicates that it will **review the EU merger guidelines** in order to clarify the application of competition rules to both horizontal mergers and non-horizontal effects of mergers.

Earlier draft versions of the strategy suggested that the European Commission was considering revising the framework governing **port concessions and land lease agreements**, including possible changes linked to the revision of EU public procurement directives. These references have not been retained in the final version of the strategy. The draft text had raised concerns among stakeholders (ESPO and FEPORT!) particularly regarding comments suggesting that long concession durations could hinder competition and limit the entry of new operators. These passages have been removed from the final document. Instead, the strategy calls on Member States and port authorities to ensure an appropriate balance between providing sufficient certainty and return on investment for private operators and ensuring appropriate contractual obligations in concession agreements

   o **Innovation and technology deployment**

Innovation is identified as a key driver of efficiency and sustainability in ports. The strategy calls for greater deployment of emerging technologies such as artificial intelligence, automation, digital logistics platforms and smart port management systems. However, the Commission notes that many innovations developed through EU research programmes fail to move beyond the pilot stage. Future research and innovation funding will therefore prioritise scaling up successful technologies and deploying them across ports.

   o **Digitalisation of logistics chains**

Digitalisation is a central element of the strategy. The Commission highlights that data exchange across supply chains remains fragmented, with many logistics systems operating through proprietary platforms. It underlines that better integration of systems can improve supply chain visibility, while avoiding the imposition of centralised platforms. To support this, the Commission announces that it will establish **EU guidelines for efficient data sharing** in the transport chain, together with actions by Member States. Key EU digital initiatives such as the **European Maritime Single Window environment (EMSWe), eFTI and the future Union Customs Code reforms** are expected to play a role in improving data flows across port logistics systems.

   o **Hinterland connectivity and operational efficiency**

The strategy also stresses that port congestion increasingly results from **limitations in hinterland connectivity rather than maritime access**. Larger vessels, higher cargo volumes and limited rail and inland waterway capacity can create operational bottlenecks in port logistics chains. Strengthening rail and inland waterway connections to ports is therefore identified as a key priority for improving supply chain efficiency and reducing congestion.

   o **Foreign investment and economic security**

The strategy also addresses the question of foreign investment in European port infrastructure. While recognising that international investment can contribute to port development, the Commission highlights the need to ensure that such investments remain compatible with the EU's economic security interests. In this context, the Commission intends to **develop guidelines for Member States by 2028 to support the assessment of foreign investments in ports**, including criteria related to

influence over strategic decisions, operational control and dependence on suppliers considered to pose security risks. The strategy also refers to the possibility of applying reciprocity in market access where EU operators do not enjoy comparable access in third-country port markets.

Pillar 2 – Advancing the Energy Transition, Sustainability and Clean Industry

The second pillar focuses on the role of ports in supporting the energy transition and decarbonisation of maritime transport and industry. The strategy emphasises several key priorities:

- o **Competitiveness impacts and review of EU ETS and FuelEU Maritime**

The strategy recognises that the competitiveness of European ports is influenced by regulatory developments affecting maritime transport. In this context, it highlights the **upcoming review of the EU Emissions Trading System (ETS), scheduled for 2026, as well as the future review of the FuelEU Maritime Regulation**. The Commission indicates that these reviews will consider potential implementation issues affecting the competitiveness of European ports, including the risk of cargo diversion to non-EU transhipment hubs. The strategy therefore acknowledges the importance of assessing how climate-related regulatory measures may affect both the competitive position of EU ports and the broader connectivity of Europe's maritime logistics network.

- o **Use of EU ETS revenues for maritime decarbonisation**

The strategy also addresses the use of revenues generated through the inclusion of maritime transport in the EU ETS. The Commission **encourages, but does not require Member States, to allocate part of these revenues to investments supporting the decarbonisation of the maritime sector and port ecosystem.** Examples mentioned include the production and uptake of sustainable fuels, improvements in ship energy efficiency, fleet renewal, deployment of shore-side electricity supply (OPS), and investments in clean maritime technologies and port infrastructure.

The strategy does not introduce binding obligations requiring Member States to earmark ETS revenues for these purposes. Earlier draft versions had referred to the possibility of establishing mechanisms enabling Member States to allocate part of ETS revenues to the maritime sector, but this reference was not retained in the final version of the strategy. Discussions continue at EU level on potential mechanisms to support the uptake of sustainable fuels and clean propulsion technologies in maritime transport.

Pillar 3 – Protecting and Securing Ports

The third pillar addresses growing security risks affecting ports and supply chains. Ports are increasingly exposed to a wide range of threats, including:
- organised crime and drug trafficking
- cyber attacks on digital systems
- geopolitical disruptions affecting trade routes
- hybrid threats targeting critical infrastructure

The strategy highlights that **ports have become key targets for criminal networks and geopolitical actors**, requiring stronger coordination between public authorities and industry stakeholders.

o **Tackling organised crime and corruption / Background checks for port workers**

The strategy builds on the work of the **European Ports Alliance**, which aims to strengthen cooperation between ports, customs authorities, law enforcement and logistics operators in combating organised crime.

The strategy highlights the importance of strengthening security procedures in ports, including measures to address risks related to organised crime infiltration. In this context, the Commission refers to the need to improve the reliability of personnel working in sensitive port environments and indicates that **background checks for port workers may play an important role in strengthening security within ports**. The strategy therefore foresees the development of an **EU framework to support the implementation of background checks for port workers in critical port functions**, with the aim of improving consistency between Member States.

The Commission also underlines that these measures should contribute to preventing criminal networks from infiltrating port operations and gaining access to sensitive logistics processes or infrastructure.

From an operational perspective, it will be important that any future framework is implemented in a **coordinated and proportionate manner across Member States**, ensuring that security objectives are achieved without creating unnecessary administrative burdens or operational disruptions for legitimate port and logistics activities.

o **Customs controls and sanitary and phytosanitary (SPS) measures**

The strategy highlights the need to strengthen cooperation between customs authorities, law enforcement bodies and logistics operators in order to improve the security of supply chains and protect critical infrastructure.

In **Section 4.1 (Internal security)**, the Commission refers to the importance of **greater alignment of customs controls across EU ports**, together with stronger security protocols worldwide, in order to address risks related to illicit trade and organised crime. The strategy also notes that the Commission supports Member States in implementing **robust sanitary and phytosanitary (SPS) measures in ports** and calls on Member States to reinforce and improve control measures on imported goods.

There is a remaining need for greater harmonisation and simplification in the practical application of SPS and customs controls across EU ports. Differences in interpretation and implementation of control requirements between Member States can lead to operational inefficiencies, delays and uncertainty for supply chain operators. Ensuring a more consistent application of these procedures across the EU port system would help strengthen both security objectives and the efficient functioning of the Single Market.

o **Cybersecurity and digital sovereignty**

As ports become increasingly digitalised, cybersecurity risks are growing. The strategy therefore proposes EU-level cybersecurity risk assessments for ports and a stronger protection of digital infrastructure.

Pillar 4 – Access to Finance and Investment

The fourth pillar addresses the significant investment needs required to modernise European ports. Stakeholders estimate that around €80 billion in investments will be required in the coming years to upgrade port infrastructure, support decarbonisation and strengthen logistics connectivity.
The strategy highlights several EU funding sources supporting port investments, including:
- Connecting Europe Facility (CEF)
- Cohesion funds
- Horizon Europe
- Innovation Fund
- European Investment Bank financing

Public funding is expected to play a catalytic role in de-risking investments and attracting private capital.

Pillar 5 – Social Cohesion, Skills and Employment

The final pillar focuses on the **workforce and social dimension of the port sector**. The strategy recognises that the digital and green transitions will significantly transform port operations, creating new skills requirements. The Commission therefore plans initiatives to support:
- training and reskilling of port workers
- digital skills development
- improved safety and working conditions in ports