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COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

EU Ports Strategy

{SWD(2026) 81 final}

1. INTRODUCTION

For millennia, people, goods and ideas have met at and passed through ports. The sheer volume of activity around ports led to the creation of the port cities we know today, and the reach of ports extended further, enabling regional and global trade. Today, **the EU's industrial strength and export capacity depend on its ability to be firmly connected to global trade flows.** Ports are essential interfaces between the European economy and international markets. Ports are also **lifelines for islands, coastal, and outermost regions, which should be preserved.**

Geopolitics run directly through our supply chains, and our ports are vital for **Europe's security and strategic autonomy.** Ports must expand capacity, decarbonise, digitalise, and reinforce security—simultaneously and at scale. **They have the potential to become hosts for new industry, clean energy, innovation clusters and today already take on a crucial role for the EU's energy supply, defence and the blue economy.**

The transformation brings opportunities for ports and the EU economy. But in parallel, ports are exposed to new vulnerabilities and responsibilities – from fighting organised criminal networks, cyber and drone threats, to addressing concerns around foreign ownership and intensifying competition from third countries. As global powers tussle to extend or protect their spheres of influence, ports risk becoming a battleground. We need to strengthen ports in their role as competitive trade hubs and support them as critical infrastructures for the EU's Economic Security and as public service providers for the resilience of our society.

EU ports handle more than 3.4 billion tonnes or 74% of goods entering or leaving Europe and around 395 million passengers each year[1]. With almost 3 million port calls per year, the EU accounts for 23% of the port calls worldwide. Their economic footprint reached a turnover of around EUR 90 billion in 2022 and around 423 000 direct jobs[2]. The trans-European transport network is based on 283 seaports, 223 inland ports and 44 mixed ports. Small and medium ports provide important services in outermost regions, remote areas, islands and highly specialised markets. Port actors include port authorities, terminal operators, tug operators, maritime pilots, bunkering and port reception facility providers, offering services to shipping and logistic companies and other stakeholders.

In a wide-ranging consultation process[3] industry, Members States and other stakeholders confirmed the need to strengthen competitiveness, empower ports in the energy transition, to decarbonise, to improve security and resilience, to access finance and make ports safer and more secure places to work. The diversity of ports, in terms of size, location, market segments served, governance models, and stakeholders, calls for a broad, and flexible approach.

Building on the 2013 Ports Policy, **the EU acts now** in providing a framework for the future of European ports**.** The EU Ports Strategy brings together ongoing and new initiatives, simplification and guidance on implementing current legislation[4].
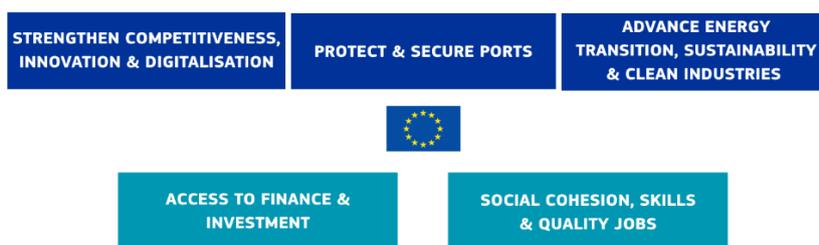
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[1] https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Maritime_transport_of_goods_-_annual_data
[2] https://data.europa.eu/doi/10.2771/2333701
[3] https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14659-EU-Ports-Strategy_en,
[4] The EU Ports Strategy addresses transport aspects of maritime and inland ports. Other Blue Economy sectors, in particular tourism, fishing and marinas, are covered by the European Ocean Pact, the EU Sustainable Tourism Strategy and the European Strategies for the Outermost Regions, coastal regions and islands.

EU Ports Strategy: five pillars

STRENGTHEN COMPETITIVENESS, INNOVATION & DIGITALISATION | PROTECT & SECURE PORTS | ADVANCE ENERGY TRANSITION, SUSTAINABILITY & CLEAN INDUSTRIES

ACCESS TO FINANCE & INVESTMENT | SOCIAL COHESION, SKILLS & QUALITY JOBS

2. STRENGTHEN COMPETITIVENESS, INNOVATION & DIGITALISATION

2.1. *Maintain global competitiveness*

This strategy supports EU ports in maintaining and strengthening their competitiveness. It focuses on innovation and digitalisation, improved hinterland connections, common EU funding priorities, regulatory simplification and the development of new business opportunities.

Maritime trade is inherently global. EU ports therefore both cooperate and compete with ports worldwide, making these relationships complex and multifaceted. EU ports and companies engage with third-country ports in areas such as clean energy and alternative fuels and invest abroad as part of global logistics chains. These activities are supported by several EU and international initiatives.

Competitiveness in ports is affected by costs (including energy, labour, state supported investments) and non-cost factors (especially applicable standards and laws). Uneven legal frameworks (for environmental, social and other aspects) and aggressive investment strategies are major concerns for a level-playing field. The Commission is preparing for the update of the EU emissions trading system in Q3 2026, followed by the planned review of the FuelEU Maritime Regulation. This update, among others, will consider any potential implementation issues that affect the competitiveness of European ports, notably the risk of traffic diversion to non-EU transhipment ports.

Beyond pricing, service quality and efficient hinterland connections remain key factors for port competitiveness. The EU further supports the sector by defining funding priorities (see Annex 1). Through its programmes, the Union supports investments that strengthen sustainability, competitiveness, connectivity and resilience[5]. Additional measures concerning maritime manufacturing and shipping are envisaged in the EU Industrial Maritime Strategy.

In certain cases, the EU also provides funding for ports in candidate countries as well as for third country port projects on several aspects. With this strategy the Commission defines clear principles (Annex 1) which will form the basis to **prioritise mutually beneficial initiatives in third-country ports**. The Commission, EEAS, EU financial institutions and Member States

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[5] The Commission supports through the Global Gateway strategy and the Clean Energy Ministerial initiatives such as the Global Gateway Green Shipping Corridors and Hubs (GGGSCH) and India–Middle East–Europe Economic Corridor (IMEC) or projects such as the "Future-Ready Shipping in Africa" as well as potential new initiatives under the Pact for the Mediterranean. The EU strategic approach to the Black Sea Region will strengthen cooperation with third countries and multilateral organisations and financial institutions, while preserving the competitiveness of EU.

should apply these principles in their initiatives and improve coordination and information exchange, in line with EU competition rules.

Access to third-country port markets should be based on fair and non-discriminatory conditions for EU and partner-country operators, in particular, the EU will consider whether to continue granting foreign market access in sensitive sectors — such as port services — where the EU operators do not receive comparable access in a third country. The **Commission will apply the principles of this strategy in negotiations on international agreements and cooperation frameworks**. It will continue to pursue market access in free trade agreement negotiations and, **together with the European External Action Service (EEAS), engage with third countries to promote fair investment conditions and access for EU businesses** in port infrastructure and operations. Bidders from countries that exclude EU operators, or from countries with which the EU has not concluded agreements ensuring fair and non-discriminatory access, should not benefit from unrestricted access to EU port-related concessions and public procurement.

Finally, **Member States and their standardisation bodies should play a leading role in setting global technical standards in relevant international fora**, including ISO. The **Commission will support these efforts through a new workstream on Innovative Ports and Terminals** under the High-Level Forum on European Standardisation[6].

2.2. *Ensuring economic security of EU ports*

As world leaders in maritime transport and logistics chains, European ports attract investment. While investments are welcome and needed, they can come with security risks, depending on the source. Foreign ownership or influence in strategic port assets can raise legitimate questions about long-term alignment with EU economic security interests, especially where state-backed actors are involved. The Commission is already addressing foreign influence and economic security through several horizontal instruments[7] to ensure that companies receiving foreign State-support, do not gain unfair competitive advantages on the EU's internal market.

The Joint Communication on Strengthening EU Economic Security[8] calls for more assertive EU action on limiting ownership, control and operation by high-risk entities of critical infrastructure. This can reduce risks of technological lock-in or dependency on (high-risk) suppliers. It can also prevent access by high-risk entities to EU-funded initiatives and support the development of trusted suppliers of critical sub-components.

To ensure the rules are implemented consistently, the Commission **will develop guidance for the Member States for assessing foreign investments in line with the EU's international commitments**. This will be based on a systemic approach including all relevant port operators according to their role in critical supply chains and in particular for ports falling under the requirements of the Military Mobility Regulation. It would notably establish thresholds and criteria for foreign influence, such as influence on strategic decisions, control of operations and dependence on high-risk suppliers of equipment. A **framework for mapping and monitoring**

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[6] https://single-market-economy.ec.europa.eu/single-market/goods/european-standards/standardisation-policy_en
[7] Including the Foreign Direct Investment Screening Regulation, the Foreign Subsidies Regulation, the Critical Entities Resilience Directive, and the NIS2 Directive, which also covers cybersecurity aspects.
[8] JOIN (2025) 977.

foreign investments in EU ports will follow, in line with the FDI screening regulation and the EU Economic Security Communication.

From a defence perspective, in line with the proposal for a Military Mobility Regulation[9], Member States should **prevent, mitigate and tackle the risks associated with foreign ownership and control of strategic dual-use port infrastructures and their related operations.** Relevant ports should undergo a thorough assessment by Member States to mitigate risks of foreign ownership, operational control and equipment from high-risk suppliers. Furthermore, Member States are to establish frameworks for timely access to critical transport resources, including ports, when alternative measures, such as contracting, cannot be mobilised within the required timeframe. **Member States should ensure the possibility of gaining temporary public control or right of use of strategic dual use infrastructure, assets or equipment under national law**. The Commission recalls the importance of the swift adoption of the Military Mobility Regulation proposal and calls on the Member States to ensure that the necessary measures are fully and swiftly implemented.

2.3. *Take innovation to the EU's ports*

Innovation has driven efficiency and competitiveness gains across the port sector. A wider use of emerging technologies like artificial intelligence, combined with a demand for innovative solutions to address today's challenges (sustainability, energy efficiency, safety and security), open the door to more innovative European solutions in ports. However, despite important EU research and long-term R&I funding, European innovative solutions do not make it to larger market deployment. To ensure deployment beyond the pilot phase, **the Commission will place stronger emphasis on this goal in future Horizon Europe initiatives, including the EUR 21 million flagship topic "Ports of the Future"**[10] as well as upcoming Horizon Europe calls.

To support this goal, the Commission will **strengthen technological leadership of the Union in the use of alternative fuels, electrification, design, retrofitting of equipment, energy efficiency and digitalisation, and include energy conversion systems, circularity, and digital solutions**. The **Commission will seek the reinforcement of public-private cooperation under the 2028-2034 Horizon Europe Framework Programme in priority areas**, based on a portfolio approach. In waterborne transport, this will build upon the achievements of the current co-programmed **Zero Emission Waterborne Transport Partnership (ZEWT),** with a view to **strengthening and expanding the EU action** in this area, to foster synergies and scale effect between decarbonisation, digitalisation, automation and circularity in the broader waterborne ecosystem.

With dedicated workshops and technical assistance, BlueInvest[11], can help testing of new technologies, market validation, provide technical assistance and support fundraising and market acceptance, especially for small and medium ports. In addition, the new "Knowledge and Innovation Community" on Water, Marine and Maritime Sectors and Ecosystems, under the European Institute of Innovation and Technology (EIT) will integrate ports in the "innovation knowledge triangle" between universities, research institutions and businesses.

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[9] COM(2025) 847 final.

[10] "Ports of the Future", in the 2026/27 Horizon Europe work programme, promotes replication across small and medium sized ports. The "Strategic Energy Technology Plan" Flagship de-risks renewable fuel technologies. Horizon 2020 and Horizon Europe have provided overall EUR 218 million to support innovation at ports.

[11] https://maritime-forum.ec.europa.eu/theme/investments/blueinvest_en

Sector stakeholders should **support the uptake and distribution of EU funded research, share best practices and develop partnerships and new business models that go beyond specific/local challenges.** They should address market requirements at large, including those of small and medium-sized ports. Member States are also encouraged **to streamline planning and permitting procedures to allow a swift take -up of innovation in ports.**

2.4. Efficient and digital port operations and logistics chains

The rise in average waiting times at major EU ports in 2024[12] showed how maritime connectivity is increasingly constrained by terminal productivity and hinterland links, not sea access alone[13]. Inefficient rail and inland waterway connections, combined with larger vessels and limited space, hinder operations. Strengthening these links can reduce transit times and costs, improve supply chains and support trade within the EU and with partners, including Mediterranean ports.

The European Maritime Space (EMS) is a key component of the trans-European transport network. **In the upcoming EMS work plan, the** EMS coordinator will **prioritise the development of sustainable and green short sea shipping hubs and links, promote collaboration between ports,** with a focus on smaller ports**, the upgrade of maritime infrastructure** and **integration with rail** and **inland waterway transport**. To further support modal shift, the Commission will **strengthen rules on access to rail service facilities**[14] and propose an **Action Plan on Inland Waterway Transport (IWT) for the period 2028-2034,** which will also focus on inland ports.

This needs to be supplemented by **Member States and industry stakeholders, who should give higher priority to hinterland connections with rail and inland waterways**[15]**.** The ability to adapt and react fast to today's challenges is a critical component for competitiveness and therefore, **port concessions and land lease contracts should allow for sufficient flexibility.** Member States are encouraged to **streamline land use planning and permitting procedures to allow a swift development of additional areas for port use**, while protecting the environment and human health in line with the proposed Regulation for speeding-up environmental assessments[16].

Digital applications can optimise port calls, improve turnaround times, reduce waiting times and optimise use of resources, while reducing emissions and improving safety and security. EU digital initiatives[17], will facilitate B2G reporting and customs processes. Furthermore, CEF Digital supports the deployment of 5G technologies in ports.

B2B data exchange is fragmented and often bound to proprietary software. Better integration of systems can improve supply chain visibility without imposing centralised platforms and

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[12] https://www.beacon.com/resources/global-port-congestion-2024-year-in-review
[13] Drewry, Ports & Terminals Insight, Q1 2025, 28/02/2025
[14] http://data.europa.eu/eli/reg_impl/2017/2177/oj
[15] In line with Regulation (EU) 2024/1679, Art. 29 of the railway infrastructure capacity Regulation, and using the consultation provisions under the Port Services Regulation.
[16] COM(2025) 0391 final.
[17] Such as the European Maritime Single Window environment (EMSWe), the electronic freight transport information (eFTI) and the upcoming revision of the Union Customs Code.

safeguards existing IT investments. The Commission **will establish EU guidelines for efficient data sharing in the transport chain**, together with actions of Member States[18].

2.5. *A functioning internal market and fair competition*

A functioning internal market is a competitive advantage for EU ports. It also supports Europe's strategic autonomy, and safeguards employment in the port sector. The 2013 EU Ports Policy[19] had trade and the internal market at its heart. While progress is visible, inconsistent implementation of single market rules across Member States, evolving port market structures, and slow permitting processes put the EU's competitive advantages at risk.

EU State aid rules frame Member States funding for ports and provide legal clarity, transparency and predictability. The revised rules on ports and maritime links in the Decision on Services of General Economic Interest (SGEI) allow Member States to support more efficiently smaller ports, across islands, coastal and outermost regions[20]. Ports must also address emerging challenges (security, cybersecurity, digitalisation, military mobility and reskilling of port workers for new technologies), and financing investments to that end should not distort competition. The Commission is currently **reviewing the Commission Regulation (EU) No 651/2014 ("General Block Exemption Regulation" - GBER).** In this context, where appropriate, also in light of the outcome of the public consultation, the Commission will assess **whether changing thresholds is necessary** and **provide further guidance**, giving examples and interpretative clarifications of GBER rules, including for port infrastructure investments. Together with the forthcoming Land and Multimodal Transport Guidelines, the new Transport Block Exemption Regulation will facilitate public support for multimodal transport facilities which are in maritime ports and have rail or inland waterways connections, whereby improving hinterland connections.

Concession and land-lease agreements with port terminal operators play a critical role in attracting capital and boosting the competitiveness of European ports. Those agreements provide the framework for long-term investments, enabling ports to prosper and address pressing societal needs. Member States and port authorities should aim for a **balance between return on investments for private operators and suitable contractual obligations** (duration, transparent and fair conditions for renewals, flexibility clauses) to ensure resilience, security, safety and reduction of emissions. The Commission will ensure the compliance with internal market rules across EU Ports.

The increasing vertical integration of large logistics and shipping operators is changing the traditional port landscape. Vertical integration can improve predictability of traffic development and thereby support long-term investment plans, deliver efficiencies and innovation across logistics chains, reduce transaction costs and improve service quality for users. At the same time, effective competition among operators should be preserved in line with applicable EU antitrust and merger rules. The Commission will **review the EU's merger guidelines** with a view to provide clear and updated guidance on the application of EU merger rules to both horizontal and non-horizontal effects of mergers.

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[18] Under the European Data Infrastructure Consortium, https://digital-strategy.ec.europa.eu/en/policies/edic.
[19] COM(2013) 295 final.
[20] http://data.europa.eu/eli/dec/2025/2630/oj

> *Flagship actions*
> - *Use guiding principles for EU funding and investments in third country ports (Annex 1).*
> - *Develop guidance to Member States with criteria for assessing foreign investments in ports in line with the EU's international commitments.*
> - *Support the digital and green transformation of European ports through innovation, promoting scale-up, replication and uptake of innovative port equipment and technologies.*

3. ADVANCE ENERGY TRANSITION, SUSTAINABILITY & CLEAN INDUSTRIES

3.1. Ports as enablers of the energy transition

With around 40% of commodities handled being energy-related, ports are becoming strategic energy and industrial hubs.

Electrification of ports: cornerstone of decarbonisation

62% of surveyed European seaports offering onshore power at one or more berths[21], but progress is uneven[22] and capacity constraints persist while demand is expected to increase[23]. The Commission will continue monitoring of Onshore Power Supply (OPS) deployment through EMSA and the European Alternative Fuels Observatory. In the upcoming **Electrification Action Plan,** the Commission **will introduce new measures to support port electrification**. In addition, the Commission **will promote greater transparency for OPS pricing**, and better forecasting of demand.

As electricity demand in ports grows, sufficient grid capacity will be key. **Member States should support non-wire technologies and smart-grid solutions, digitalised procedures and better utilisation of existing grid assets**. Furthermore, especially for small and medium ports, demand management solutions should be promoted. The revised TEN-E proposal[24], together with the TEN-T Regulation support the development of port infrastructure, and the integration of offshore renewable energies. **Member States should strengthen synergies between the TEN-T and TEN-E and other electricity network planning**, especially for offshore renewable energy corridors. The upcoming Offshore network development plans (ONDPs) should in this context include onshore needs, which also should be reflected in national network development plans on transmission and distribution levels.

Permitting and accelerated grid connections

Offshore wind and floating installations require larger and reinforced port facilities for assembly, storage and deployment, more physical space and better grid connection. The **European Grids Package**[25] and the **Guidance on efficient and timely grid connections**[26] **will speed up connections to the grid for viable projects**, including in ports of all sizes. The T-MED Trans-Mediterranean Renewable Energy and Clean Tech Cooperation will support sustainable energy connectivity among Mediterranean ports. A new platform for EU

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[21] ESPO, Environmental Report 2025 - EcoPorts inSights 2025.
[22] mainly low voltage OPS, while high voltage OPS for larger ships remains scarce.
[23] https://data.europa.eu/doi/10.2833/7036399.
[24] COM(2025) 1006 final.
[25] The "European Grids Package", COM(2025) 1005 final.
[26] Commission Notice "*Guidance on efficient and timely grid connections*" (C/2025/6703).

distribution network planning and a dialogue with Transmission System Operators (TSOs), Distribution System Operators (DSOs), and national regulatory authorities, will address best practices for sequencing grid build-out, including specific working groups with network users, including ports on grid planning. In their case-by-case assessments, **Member States should also presume[27], that electricity transmission and distribution infrastructure, including OPS in ports are of overriding public interest, thus simplifying the deployment of grids in port areas.**

Ports as multi-fuel production and supply hubs

The EU regulatory framework[28] and the Sustainable Transport Investment Plan underscore ports' role for rolling out clean fuels. While a multi-fuel approach ensures flexibility and resilience, uncertain demand for fuels delays investment and thus is it important to match these two market forces. While Fuel EU Maritime and the measures promoted in the EU Industrial Maritime Strategy look into the demand aspect, for the supply side, the **Commission will consider, in the context of the upcoming Energy Union Package, how to promote the availability of sustainable fuels in ports**. The upcoming revision of the Alternative Fuels Infrastructure Regulation[29], **will consider measures to accelerate the deployment of alternative fuels infrastructure for shipping**. In parallel, renewable and low carbon bunkering rules should be harmonised across the EU aligned with the EU Renewable Energy Directive to avoid discrepancies and distort competition within the EU internal market. Together with an effective Union Database, international shipping companies will be able to trace renewable and low-carbon fuels, enabling a robust EU-wide certification and traceability system that effectively mitigates risks of irregularities and fraud.

The Pact for the Mediterranean will contribute to the uptake of low-carbon and renewable fuel for maritime transport, while safeguarding the competitiveness of EU ports. Significant and dedicated resources for financing decarbonisation can be mobilised through the EU Emissions Trading System (ETS) revenues auctioned by EU Member States following the extension of the system to maritime. As Member States are legally required to use revenues from the EU ETS for investment in climate measures, the Commission **strongly encourages Member States to allocate a part of ETS revenues** to maritime decarbonisation investments across the maritime cluster in Europe[30].To maximise impact and achieve synergy effects at EU level, including between shipowners, shipyards, technology and fuel suppliers and port stakeholders, the Commission will **coordinate Member States' efforts and facilitate exchange of best practices**, including possibly through guidelines.

To guide investment planning, the **Renewable and Low-Carbon Fuels Alliance (RLCF) will,** by the end of 2026**, assess infrastructure capacity and future needs for the supply of renewable and low-carbon fuels in and to ports.** Furthermore, the RLCF will encourage discussions between shipowners, the sustainable fuels industry and financial institutions with a view to advancing the production and supply of renewable and low-carbon fuels in the

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[27] COM(2025) 1007 final.

[28] Including the Alternative Fuels Infrastructure Regulation, the FuelEU Maritime Regulation, inclusion of maritime transport in the EU ETS, as well as the TEN-T and TEN-E Regulation.

[29] http://data.europa.eu/eli/reg/2023/1804/oj

[30] Such as production and uptake of sustainable fuels, improvement of the energy efficiency of ships, fleet renewal, investments in innovative clean marine technologies, and sustainable infrastructure and OPS in ports.

waterborne sector. Ports can be vital for hydrogen valleys[31] with cross-border hydrogen import terminals included under TEN-E. The Commission, under the Clean Hydrogen Joint Undertaking, will **commission a study in early 2026 to underpin the Commission's activities in the Hydrogen Global Ports Coalition** under the Clean Energy Ministerial.

Industrial clusters & energy sharing in port areas

Ports are key enablers of Europe's clean-energy-based industry. However, fragmented planning, limited coordination between ports and with industrial clusters, together with uncertainty over future energy infrastructure demand can slow investment and reduce system efficiency. The **Commission calls on Member States to support structured cooperation between ports and local industrial clusters**, promoting deployment of renewables, energy sharing, reuse of waste heat, storage solutions and the development of port-centred energy communities and integration with local heating and cooling networks. The Commission will **support partnerships with ports, local authorities and industrial clusters**. The **LIFE Clean Energy Transition sub-programme** will finance projects promoting local energy cooperation, and ports can apply to calls for proposals planned for spring 2026 and 2027.

The Commission **encourages closer cooperation between ports, energy companies, grid operators and local authorities** and is ready to provide informal guidance on antitrust issues[32], taking account of the Commission's Guidelines on horizontal cooperation agreements[33]. The Commission **will organise a series of targeted workshops for ports**, on the practical application of key EU energy legislation, the integration of renewables, energy efficiency, green hydrogen and alternative fuels[34] and on deploying offshore and net-zero technologies, including CO_2 management and storage.

3.2.   Strengthen environmental sustainability and simplify permitting procedures

Ports are both vital economic assets and environmentally sensitive areas[35], which requires aligning competitiveness with environmental protection and decarbonisation. The EU's legal framework[36] pursues this balance, including by envisaging specific flexibilities in cases of overriding public interest. Further EU policies support pollution reduction, ecosystem restoration, nature-based solutions and the sustainable blue economy. The European Ocean Pact[37] and the Water Resilience Strategy recognise ports' roles in protecting marine ecosystems together with the Marine Strategy Framework Directive and the EU Taxonomy Regulation framework[38]. As part of a broader push to boost competitiveness in the EU, the Commission **will undertake several actions to simplify the regulatory burden** while safeguarding environmental protection. The Commission **will revise the Taxonomy Climate Delegated Act**

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[31] 21 projects supported since 2019 with EUR 253 million. Clean Hydrogen Partnership, Study on Hydrogen, Ports and Industrial Coastal Areas.

[32] This has been done in Case AT.40976 – APM Terminals, guidance letter dated 9.7.2025 (COM/2025/4523 final).

[33] (2023/C 259/01).

[34] Including biofuels and renewable fuels from non-biological origin (RFNBOs).

[35] https://data.europa.eu/doi/10.2832/3479075.

[36] Built on the Habitats and Birds Directives, the Ambient Air Quality Directive, the Nature Restoration Regulation and complemented by the Maritime Spatial Planning Directive and the Marine Strategy Framework Directive.

[37] "*The European Ocean Pact*", COM/2025/281 final.

[38] http://data.europa.eu/eli/reg_del/2021/2139/oj (notably activity 6.16.).

to improve the usability of the Technical Screening Criteria and to simplify and update them to reflect policy, legislative and technological developments.

The proposed **Regulation on speeding-up environmental assessments**[39] will accelerate assessments with digitalisation, reduced timelines, combined assessments and single points of contact. **Port decarbonisation projects of strategic EU relevance can benefit from tacit approval, and procedural and judicial prioritisation.**

The RESourceEU Action Plan support ports in becoming strategic hubs for circular activities such as large-scale scrap-metal or composite materials recycling, advanced materials processing and recycling, powered by clean energy[40]. With the transition to clean fuels, hazardous waste streams change and require appropriate reception facilities. The revised Water Framework Directive (WFD)[41] offers Member States flexibilities for the authorisation for projects with short-term impacts or activities deteriorating the chemical status of water bodies without increasing overall pollution[42]. The Commission will issue further guidance on WFD permitting in 2026. **Member States should use, where relevant, the port development-related provisions under the WFD** and **ensure a timely implementation of new environmental rules on sea pollution from shipping in ports**.

Member States are encouraged to address GHG emissions and air pollutants in ports in the implementation of their National Energy and Climate Plans and National Air Pollution Control Programmes. Identifying and assessing sources of emissions and other pollutants is challenging due to the complexity of port activities[43]. EU-funded projects highlighted the need for an agreed approach, common methodology and application. The Commission will **aim for more consistent emission measuring and reporting in ports**, supported by further research and innovation.

> *Flagship Action*
> - *Accelerate permit-granting procedures and provide faster assessment procedures for strategic energy, recycling and decarbonisation port-related projects through the European Grids Package and the Environmental Omnibus.*
> - *Accelerate port electrification, provide timely and non-discriminatory access to the grids.*
> - *Promote partnerships for energy cooperation in and around port areas for sustainable use of energy, including hydrogen.*

4. PROTECT & SECURE PORTS

4.1. *Internal security*

The shifting geopolitical landscape has amplified terrorism, sabotage, organised crime and corruption, and given rise to cyber/hybrid threats as well as airborne and water drones across Europe. A growing range of sabotage and hybrid actions below the threshold of armed attack by Russia increasingly displays characteristics comparable to state-sponsored terrorism. The Baltic Sea region and its ports remain particularly exposed to Russian hybrid warfare activities.

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[39] COM(2025) 0391 final.
[40] RESourceEU Action Plan, COM(2025) 945 final.
[41] http://data.europa.eu/eli/dir/2000/60/oj
[42] For example, relocation of already polluted water or sediments.
[43] Lack of data on air quality: https://www.eea.europa.eu/en/analysis/publications/maritime-transport-2025.

EU and national legal frameworks for combating terrorism and hybrid warfare should be systematically used, and where appropriate reviewed[44]. Cooperation between relevant authorities is needed to further strengthen the fight against the circumvention of restrictive measures and support effective EU responses.

The Commission will **update existing guidance** on maritime security legislation **to adequately cover all relevant threats**, including cyber and hybrid threats, illicit trafficking and malicious use of non-military drones, assisted by agencies such as the European Maritime Safety Agency (EMSA) and the EU Agency for Cybersecurity (ENISA). **To ensure security of ports at global level against such threats, the Commission will work with the EU Member States towards updated international guidance within the International Maritime Organization (IMO).** Better data collection and analysis is needed to address terrorists and organised crime risks on trafficking via passenger terminals and commercial maritime transport. Port workers must be better trained and protected as partners in the fight against organised crime, measures, cyber and hybrid threats.

The ProtectEU: European internal security strategy[45] underlines how ports have become prime targets for external threats and foresees maritime security to address drones and sabotages on undersea cables and to improve port and supply chain security, including neighbouring countries. The **EU Maritime Security Strategy** addresses resilience and protection of ports as critical maritime infrastructure. To tackle criminal infiltration, the Commission will in 2026 **present an EU anti-corruption strategy**, building on the Directive on combating corruption.

The European Ports Alliance combats drug trafficking and organised crime by bringing together law enforcement, customs, port authorities and industry. It strengthens port resilience through cooperation, best-practice sharing and identifying operational gaps. Building on this work, **the Commission will propose an EU framework for background checks for port workers. Security efforts will also be extended to inland ports, including those not covered by the ISPS Code, in cooperation with river commissions. The Commission will publish best practices to prevent drug trafficking and explore further cooperation with candidate countries**.

Prevention and detection of cargo contamination and criminal infiltration need to be tackled already at departing non-EU ports. This requires **regional frameworks to be developed jointly by the Commission and the EEAS to cooperate with third countries in improving ports security, based on shared responsibility, and where possible supported by Global Gateway or other cooperation instruments. In this context, targeted assessments of high-risk third-country ports will be performed to identify and remedy security gaps, improve the exchange of information and, where serious deficiencies remain unaddressed, foresee possible responses.** This system can contribute to building a trusted partnership with third countries in fighting security threats in ports.

Greater alignment of customs controls across EU ports together with better security protocols worldwide, can protect EU parties and critical infrastructure, through instruments

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[44] Communication on the EU's eastern regions bordering Russia, Belarus and Ukraine COM(2026) 82 final
[45] COM/2025/148 final.

such as **"Do Not Load".** The Commission will **work on public-private information exchange between customs and maritime logistics companies on drug trafficking and illicit trade. In addition, the Commission stands ready to assess the extent to which antitrust instruments may support the application of the guidance or best practices developed by the European Ports Alliance.** Under the EU Customs Reform Proposal, the new EU Customs Authority and the EU Customs Data Hub will enable customs to perform EU-level risk analysis and address international supply chains, including e-commerce, by customs and other law enforcement bodies, through effective controls and conformity checks.

In addition, the Commission supports Member States in implementing robust sanitary and phytosanitary (SPS) measures in ports. The Commission is committed to enhance these mechanisms and calls on Member States to reinforce and improve control measures on imported goods. Member States **should prioritise the implementation of maritime security legislation, adopt best practices shared within European Ports Alliance Public Private Partnership to combat organised crime (including drug trafficking) and corruption, and tackle port security in its entirety,** ensuring sufficient security staffing and essential investments.

4.2. *Build up the resilience and preparedness of ports and logistics networks*

Climate change hazards, such as sea level rise, coastal storms and droughts as well as environmental degradation lead to increased risks of floods and saline intrusion, impacting the navigability, the state of port infrastructure, and the reliability, efficiency and safety of port and docks operations. To support Member States on preparedness and resilience planning, the **Commission will put forward a European Integrated Framework for Climate Resilience in 2026**.

Member States are obliged to adopt and implement national adaptation strategies and plans[46]. Given their vulnerability and strategic importance, **ports should develop** own **climate resilience plans**. These plans should also help counter environmental degradation. Climate proofing guidelines for infrastructure and "climate resilience by design" principles should be applied, when constructing new or refurbishing existing ports, and for infrastructural and operational development of interfaces to the logistics networks. The **exchange of best practices on climate resilience action in ports**, will be facilitated within the European Maritime Space.

Accidents and malevolent events are a significant threat to EU infrastructure. A transport network is only as strong as its weakest link, therefore sufficient redundancy and alternative connections in the TEN-T network are critical to protect supply chains, prevent systemic economic shocks and ensure military mobility and defence readiness. To protect ports against natural and human-made hazards, Member States **should include ports when implementing the Directive on the resilience of critical entities (CER Directive)**[47]. The upcoming guidelines for critical entities will facilitate their protection and the safety of personnel. In line with the Preparedness Union Strategy, authorities should promote a high level of risk

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[46] Article 5(4) of Regulation (EU) 2021/1119, http://data.europa.eu/eli/reg/2021/1119/oj .
[47] http://data.europa.eu/eli/dir/2022/2557/oj

awareness among communities located near port areas to empower residents to react and respond effectively in the event of an incident.

The EMS coordinator will facilitate resilience planning for maritime and hinterland connectivity with other European Transport Corridor Coordinators. Member States should furthermore prioritise interoperability of ports within the EU rail system as well as the achievement of a "Good Navigation Status" by 2030 for inland waterways. This will tackle the resilience of the inland waterways, rail capacity constraints, terminal and border bottlenecks and poor coordination among infrastructure managers.

Global Navigation Satellite Systems (GNSS) jamming and spoofing are increasingly witnessed in the Baltic Sea, Black Sea and Mediterranean and can lead to collisions at sea or in ports. The recent Galileo Open Service Navigation Message Authentication as well as a radiofrequency interference monitoring service, foreseen in the proposed European Competitiveness Fund (ECF) help address this growing threat[48].

Member States should ensure that critical goods are handled and stored in line with military mobility requirements, the EU stockpiling strategy[49] and the Security of Supply regime introduced by the European Defence Industry Programme. Ports and in particular smaller ports are important for EU preparedness and should play important roles when Member States **optimise mapping, information sharing and coordination to set up and protect stockpiles and minimise disruptions.** The Action plan on drone and counter-drone security[50] provides a toolbox, with stress testing of critical infrastructures, enhanced maritime domain awareness, and coordinated counter-drone preparedness.

Member States should protect and strengthen vulnerable infrastructure, superstructure and equipment and address bottlenecks, enhance efforts to harden their critical infrastructure. Member States should ensure sufficient redundancy and capacity to absorb short and medium-term disturbances in their logistic chain and supply of critical goods, allowing especially the most vulnerable military mobility nodes to reach adequate operational levels.

4.3. Digital autonomy for economic security

Port digital systems, traffic management, and logistics platforms are becoming strategic infrastructure. Whoever controls the data also controls the flows. Data exchanges can reveal commercially confidential information of port users and is often dependent on foreign hard- and software, with much of the bloc's data stored outside the EU. Criminals and unfriendly State actors are increasingly exploiting the inherent vulnerabilities of digital systems and processes for drug trafficking and cyberattacks.

While cybersecurity issues require dedicated action, the EU must step up and secure digital sovereignty over the data that underpin civil and military transport. This implies secure automation solutions, cloud and computing infrastructure, the use of AI and next generation connectivity (5G/6G, GNSS) to avoid any form of coercion due to its unique ability to meet

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[48] Space-based Earth-Observation systems such as Copernicus can contribute to the monitoring of the security of ports.
[49] COM(2025) 528
[50] COM(2026) 81 final.

stringent requirements in terms of short latency and high throughput to support mission-critical services.

The EU also needs trained operators and workers, conscious of their vital role in ensuring the EU's critical infrastructure networks function as it should. Together with the Industrial Maritime Strategy, a new focus on digital autonomy will offer EU businesses and entrepreneurs opportunities to develop and deploy tomorrow's digital solutions to detect and counteract criminal activities.

To reinforce the digital autonomy for ports under the current Multiannual Financial Framework, **the Commission will support research and development initiatives to secure data exchanges and data storage for ports and stakeholders along multimodal logistics chains.** Together with Member States, transport, logistics and the IT industry, the Commission **will promote and support solutions towards EU sovereignty over data underpinning its vital civil and military transport and seek cooperation with likeminded countries**.

4.4. *Cybersecurity*

Ports' complex infrastructure and growing digitalisation create significant cybersecurity[51] risks for supply chains and critical EU infrastructure, including concerns over high-risk suppliers controlling key system. The European Union Agency for Cybersecurity (ENISA) Cyber Risk Management for Ports guidelines[52] and the European Maritime Safety Agency (EMSA) Guidance on addressing cybersecurity onboard ships[53], support implementation. The Commission will **continue cooperating with the IMO to advance harmonised global cybersecurity standards for the maritime sector through a non-mandatory Cyber Code. ENISA will update the Cyber Risk Management for Ports guidelines** with state-of-the-art measures and the latest EU policy developments such as the NIS2 Directive**)**.

Together with the NIS Cooperation Group and ENISA, the Commission will conduct a **Union-level coordinated cyber security risk assessment on ports, to identify cybersecurity risks and recommend mitigation measures.** In the revision of the Cybersecurity Act, the Commission proposes a trusted ICT supply chain security framework. Based on the Union-level security risk assessment, this would allow for proportionate restrictions on high-risk suppliers in our critical infrastructure. The Commission will carry out coordinated preparedness testing and drilling exercises at ports on specific cybersecurity risk scenarios.

To exchange best practices and information, the Commission stands ready to work with Member States in a **specific forum for Member States' cybersecurity and maritime/port authorities**, based on the NIS Cooperation Group established pursuant to Article 14 of Directive (EU) 2022/2555. This could cover cyber threats, incidents, vulnerabilities, near misses, awareness-raising, training, exercises and skills, capacity building, standards and technical specifications with special attention to small and medium-sized ports. Participation of ENISA, EMSA and relevant stakeholders and coordination with public-private partnerships, such as the European Maritime Information Sharing Analysis Centre (EM-ISAC) and regional initiatives such as the Black Sea Maritime Security Hub will be sought. The digital omnibus

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[51] Maritime cybersecurity is covered by the NIS2 Directive and the Cyber Solidarity Act and at international level through the IMO's ISPS Code.
[52] https://www.enisa.europa.eu/publications/guidelines-cyber-risk-management-for-ports .
[53] https://www.emsa.europa.eu/publications/inventories/download/7660/5074/23.html

package proposes to establish a single-entry point for obligatory reporting of cyber security incidents.

Flagship Actions
- *Update existing guidance on port security to adequately cover all relevant threats.*
- *Develop regional frameworks jointly with the EEAS to cooperate with third countries in improving ports security and work on greater alignment of customs controls across EU ports together with better security protocols worldwide.*
- *Propose an EU framework for background checks for port workers.*
- *Create a forum for Member States' cybersecurity and maritime/port authorities to exchange information and best practices.*
- *Carry out Union-level coordinated security risk assessment to identify the cybersecurity risks and recommend appropriate measures to mitigate them.*

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5. ACCESS TO FINANCE & INVESTMENT

Only a mix of EU, national and private funding, supported by predictable regulatory frameworks and de-risking tools, will address the challenges and evolving roles that ports face. Stakeholders have provided estimates of investment needs[54], based on increased trade flows, decarbonisation efforts, increasing vessel size, and sustainability and resilience needs. Funding bottlenecks include access to secure funding, rising costs and lengthy and costly permitting procedures.

Public funding, in line with State aid rules where applicable, reduces risks for private investors, enabling projects with significant public value, addressing societal challenges. However, public funding is limited and **must be targeted to maximise its impact (see Annex 1 for funding principles)**.

The EU supported port projects on energy, sustainability, connectivity, innovation and other aspects under several instruments since 2014, with approximately EUR 10 billion for deployment and more than EUR 200 million for R&I, including CEF, ERDF and Cohesion Programmes, Horizon 2020 and Horizon Europe[55]. The Commission will also **prioritise support to the development of OPS in ports, in a 2026 CEF call**.

Under the next Multiannual Financial Framework (2028-34), a number of instruments can support investments in ports: the proposed **European Competitiveness Fund (ECF)** could include investments in clean, secure, dual-use, multimodal and sovereign digitalised infrastructure, superstructure and equipment in ports, including charging infrastructure and blue tech. The **Connecting Europe Facility 2028-2034 (CEF3)**, with a proposed transport budget of EUR 51.5 billion, will be a key EU instrument, with ports as part of cross-border

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[54] ESPO estimates EUR 80 billion: https://www.espo.be/media/ESP-3217_InvestmentStudyReport2024_LR.pdf
[55] CEF-T (EUR 3.9 billion), CEF-E (EUR 856 million), ERDF and Cohesion Fund programmes (EUR 3.7 billion), Innovation Fund (EUR 870 million), Horizon 2020 and Horizon Europe (EUR 218 million). InvestEU leveraged EUR 200m in ports, plus EUR 730m on digital and CCS relevant for ports. The Recovery and Resilience Facility (RRF) is providing significant support in some Member States to projects on onshore power supply and greening of ports.

connectivity funding priorities[56]. The future **Horizon Europe 2028-2034** should support innovation in ports.

Under the proposed Regulation governing the **National and Regional Partnership Plans**, one of the specific objectives includes measures enhancing Union transport infrastructure and contributing to the completion of the TEN-T while decarbonising and improving connectivity, security and accessibility for remote, peripheral and less connected areas. With the available funds, **Member States and regions will be able, depending on local needs and circumstances, to promote the development of their ports.**

As set out in the EU Industrial Maritime Strategy, the Innovation Fund, financed by the EU ETS, will open in 2027 a dedicated maritime call, which can also benefit projects in ports.

The European Investment Bank Group (EIB Group), has in the period 2014-2025 provided support to projects in maritime and inland ports with approx. EUR 2.8 billion from own resources, including projects on climate resilience, decarbonisation, cohesion, innovation, digitalisation, security and defence, offshore renewables and alternative fuels[57]. **The Commission will request EIB Advisory to deliver capacity building support specifically for small and medium-sized TEN-T ports.** Furthermore, the Commission will **engage with National Promotional Banks and Institutions and private financial stakeholders to identify additional financing solutions** in line with the priorities, criteria and conditions set out in this strategy.

The dynamic landscape of the global port industry is witnessing a shift beyond core business activities, expanding to new technologies and innovations that unlock fresh opportunities. Many ports are already successfully diversifying, yet there remains potential for further growth. **EU ports should pursue forward-thinking, out-of-the box strategies, integrating cutting-edge technologies and innovative sustainable practices**. In particular, small and medium ports should seize business opportunities in the energy transition and digitalisation.

6. SOCIAL COHESION, SKILLS & QUALITY JOBS

6.1. Ports as connectors

Ports are vital enablers for the economic development, resilience, social and territorial cohesion of arctic and coastal areas, islands and outermost regions and their 20 million EU citizens. Industrial development and innovative maritime clusters in ports improve the local economy, while waterfront public and private spaces increase the attractiveness of cities. This may result in competition for space and a negative environmental impact in densely populated areas.

The Commission will **continue to support territorial cohesion and the connectivity of islands and outermost regions**, notably the ones with demographic challenges, through Cohesion policy funding and the Connecting Europe Facility for Transport (CEF-T) and **invites Member States to support infrastructure, clean energy and fuel, safety, and sustainability improvements for small and medium sized-ports**, notably on islands, in remote and outermost regions. The Commission will **include policy measures to strengthen the economic, environmental and social contributions of ports to local communities** in the

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[56] CEF 2028-2034 proposed budget EUR 29.9 million for specific objectives on energy, (COM (2025) 547).
[57] https://www.eib.org/en/products/index: What we offer.

framework of the upcoming Coastal Communities Strategy and Island Strategy Communications. Port-city interactions require balancing economic, environmental and social factors. The Commission will **strengthen dialogues and support the development of best practices and guidance on enhancing port-city relations**[58]. Furthermore, the Commission proposes a new roadmap for competitive small and medium-sized ports.

6.2 A skilled workforce and safe working conditions in EU ports

A skilled and continuously trained workforce is critical to delivering the fair, clean and digital transitions in ports and associated blue economy activities, including in local communities around ports. A new Blue Generational Renewal Strategy under the European Ocean Pact, planned for 2027, will help develop **a skilled next-generation workforce across all blue economy sectors, including ports.**

Under the reinforced Pact for Skills, announced in the Union of Skills, the Commission encourages the **social partners, ports and other stakeholders, including relevant training centres, to establish a dedicated skills partnership for the ports sector** to anticipate skills needs, address shortages, promote upskilling and reskilling initiatives[59] and inclusive access to quality jobs, in particular for women and young people. The maritime industry, including ports, are invited to **cooperate with the large-scale partnership for the digital ecosystem in the Pact for Skills** in order to support digital upskilling in the ports sector, and to **submit pledges under the Cybersecurity Skills Academy** and **use the European Cybersecurity Skills Framework (ECSF) tool for port professionals**. Complementary actions under the EU Industrial Maritime Strategy to make careers in the maritime transport cluster more attractive and promote mobility between sea- and shore-based roles are also highly relevant for the ports sector.

The EU acquis on occupational safety and health (OSH) applies to ports. Furthermore, strengthening cooperation between national port authorities, labour inspectorates and maritime safety agencies, including cross-border cooperation with the support of the European Labour Authority, is key to protect workers.

Recent amendments[60] have furthermore clarified the application of maritime transport accident investigation rules relating to port workers on board of ships. The Directive on Port State Control[61], provides for a system of targeted compliance spot checks of vessels calling to EU ports. To further enhance safety, and with the involvement of social partners, **the Commission will prepare guidance on the application of maritime safety legislation to port workers on board ships**. The EU will support further research and guidance on the **safe handling of alternative, renewable, low- and zero-carbon fuels in the port area** under Horizon Europe and **the Commission will prepare guidance and training material on safe handling of alternative fuels in ports**.

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[58] Through the EU Mission Climate-Neutral and Smart Cities, the EU Mission Restore our Ocean and Waters, the European Ocean Pact, the Coastal Communities Strategy, the source-to sea angle of the Water Resilience Strategy. EU urban initiatives, such as the Green City Accord and the Covenant of Mayors encourage the pursuit of ambitious environmental and climate-related goals in port cities.

[59] Building on initiatives such as the Council Recommendation on a fair transition towards climate neutrality, the Net Zero Industry Act (including net zero academies) and the Quality Jobs Roadmap.

[60] http://data.europa.eu/eli/dir/2024/3017/oj

[61] http://data.europa.eu/eli/dir/2024/3099/oj

The EU will continue to promote high safety and labour standards, social dialogue and good practices, including in international fora. **Member states are encouraged to support safety and sustainability[62] improvements in ports and ensure implementation and respect of Union and national labour legislation and collective bargaining agreements.**

Flagship Actions
- *Support small and medium-sized ports with a specific roadmap (Annex 2).*
- *Support the development of a skilled next-generation workforce across all blue economy sectors, including ports, through actions under the Blue Generational Renewal Strategy.*
- *Support social partners and relevant stakeholders to establish a Pact for Skills for the ports sector on upskilling, reskilling and inclusion of workers.*
- *Prepare guidance on the application of maritime safety legislation to port workers on board ships.*
- *Prepare guidance on safe handling of alternative fuels in ports.*

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7. CONCLUSION

This strategy highlights the vital role of ports for the EU economy and our society. It sets out a framework to future-proof the EU ports sector, improve its competitiveness, and expand ports' role for society in a secure, safe and sustainable way, and increase resilience, military mobility and cyber and economic security. The Commission is committed to ensuring its effective implementation and the achievements of its objectives jointly with all the above stakeholders. To this end, the Commission will launch a **high-level Maritime Industries and Ports Board** chaired by the responsible Commissioner and EVPs with a view to have a continued exchange on the implementation of the actions outlined in **both EU Industrial Maritime and Ports strategies** and to collect feedback on developments in the market.

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[62] Including Directive 2012/18/EU (Seveso), Directive 2014/34/EU (ATEX). Directive 1999/92/ EC (safety and health protection of workers), Directive (EU) 2024/1788 (Gas and Hydrogen package).

ANNEX 1: Funding principles[63]

A) Common principles for EU port projects in all relevant EU funding streams:

- Public funding should focus on attaining the highest and most catalytic impact on public and societal challenges in line with applicable State aid rules.
- Grants should only be awarded to projects of clear public interest, leveraging and de-risking private investments.
- Public priorities should include the resilience of critical supply and logistics chains, connectivity, the provision of green fuels, on-shore power supply and charging, port electrification and grid connections, green infrastructure and sustainable port operations, dual-use capabilities and physical and digital port security, fighting crime and drug trafficking, creating employment opportunities in coastal communities, circular economy, reduction of waste, and recycling.
- Particular attention should be paid, across islands, coastal and outermost regions, depending on their needs, to small and medium sized ports and especially in terms of improving safety, electrification and access to grids.
- The development of EU solutions should be prioritised and their deployment increased.
- Creating a resilient port network of ports, able to ensure critical supply and logistic chains, military mobility, and connectivity, including islands and outermost regions and protecting EU sea ports from international threats.
- EU ports directly exposed to unfair competition from third country ports should benefit from funding for green infrastructure and port equipment.
- Public funding for entities within EU ports directly or indirectly controlled by third country interests should be screened closely in cases linked to EU security. and public order interests including critical or dual use infrastructures.
- Solutions should be incentivised to support innovation and resilience in the EU, and synergies between sectors should be explored.
- Potential security benefits of relying on technology and service providers from within the EU or from like-minded countries should be considered.
- Solutions proposed by actors in enlargement countries should be considered as part of the wider EU-supply chain.

B) Guiding principles for support to port projects in third countries:

- Focus on mutually beneficial partnerships, where priorities are shared, such as implementing common standards, capacity building on regulatory measures, expanding clean fuel infrastructure, protecting the environment, biodiversity and climate, enlargement priorities, maritime and port safety and security, and combating drug and human trafficking and other types of illegal or illicit use of port infrastructure. Ensure fair competition, respect of human rights, social and environmental standards, climate protection, as well as safety and security requirements are respected.

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[63] This Annex is without prejudice to the legislative procedures as regards the adoption of the Multiannual Financial Framework 2028-2034.

- Safeguard EU competitiveness (including a competitiveness check to assess financial support to port projects that would negatively impact on activities in EU ports within 300 nautical miles).
- Benefit EU policy goals related to connectivity and trade, import/export of critical raw materials or renewable fuels, and other goods of critical importance for the EU economy.
- Ensure relevant international agreements between the EU and third countries contain fair market access conditions for port and terminal services and to concessions for the provision of those services, with clear mechanisms to follow their application.
- Support adherence to ambitious binding international agreements in IMO.

ANNEX 2: A new roadmap for competitive small and medium-sized ports

Small, medium-sized and island ports are an important part of the European port system with a lot of potential. They support coastal communities, connectivity and territorial cohesion, while linking regional economies and contributing to Union priorities at local and regional level. They also play a role in the Union's strategic autonomy, notably in energy and critical supply chains, and support the blue economy, including fisheries, as well as important and specialised market segments such as passenger transport, energy and offshore electricity. This strategy therefore gives specific attention to small and medium-sized ports, including in relation to simplification, innovation, the European Maritime Space, electrification and security. The Coastal Communities Strategy will further support the competitiveness and diversification of coastal regions, with particular emphasis on small ports. The Commission's **roadmap on the energy transition of EU fisheries and aquaculture** will also address renewable energy use in small ports and support the development of a harmonised EU methodology to measure energy consumption and emissions in ports. Targeted support and guidance will also be provided.

- ➤ **Specific funding priority**, **Cohesion policy funding** and **financial capacity building and project preparation** by the EIB advisory hub.
- ➤ Better **support by Member States** with the Decision on Services of General Economic Interest.
- ➤ Promotion of **electrification of industrial sites and clusters** with the upcoming Electrification Action Plan.
- ➤ **Pilot projects on integration of alternative energy sources** (potential European Maritime, Fisheries and Aquaculture funding).
- ➤ **BlueInvest Platform** for support to testing new technologies, market validation, technical assistance and fundraising.
- ➤ **Cybersecurity advice and capacity building.**
- ➤ Extending the Port Alliance to share **best practices and advice on fighting drug trafficking and criminal activities.**
- ➤ The upcoming **European Maritime Space (EMS) work plan** will address the development of sustainable and green short sea shipping hubs and links, collaboration between ports, with a focus on smaller ports.
- ➤ The **Action Plan on Inland Waterway Transport (IWT) for the period 2028-2034,** will include specific actions to promote knowledge sharing and support inland ports.

ANNEX 3: Summary of actions and guidance

Pillar I – STRENGTHEN COMPETITIVENESS, INNOVATION & DIGITALISATION

The Commission will:

➢ as of 2026, prioritise mutually beneficial initiatives in third country ports in line with clear guiding principles.

➢ as of 2026, apply the principles of this strategy in negotiations on international agreements and cooperation frameworks.

➢ as of 2026, continue to pursue market access in free trade agreement negotiations and, together with the European External Action Service (EEAS), engage with third countries to promote fair investment conditions and access for EU businesses.

➢ as of 2026, support the Member States in their efforts in international standardisation for a through a new workstream on Innovative Ports and Terminals under the High-level Forum on European Standardisation.

➢ by 2028, develop guidance for the Member States for assessing foreign investments in line with the EU's international commitments and a framework for mapping and monitoring foreign investments in EU ports.

➢ as of 2026, place stronger emphasis on the deployment beyond the pilot phase in future Horizon Europe initiatives, including the flagship topic "Ports of the Future".

➢ strengthen technological leadership of the Union in the use of alternative fuels, electrification, design, retrofitting of equipment, energy efficiency and digitalisation, and include energy conversion systems, circularity, and digital solutions.

➢ as of 2026, seek the reinforcement of public-private cooperation under the 2028-2034 Horizon Europe Framework Programme in priority areas.

➢ in 2026, strengthen rules on access to rail service facilities.

➢ in 2028 propose an Action programme on Inland Waterway Transport (IWT), for the period 2028-2034, focusing on inland ports.

➢ by 2028, establish EU guidelines for efficient data sharing in the transport chain.

➢ in 2027, where appropriate, also in light of the outcome of the public consultation, assess whether changing thresholds is necessary and provide further guidance, giving examples and interpretative clarifications of GBER rules, including for port infrastructure investments.

➢ in 2026, review the EU's merger guidelines with a view to provide clear and updated guidance on the application of EU merger rules to both horizontal and non-horizontal effects of mergers.

The European coordinator for the European Maritime Space (EMS) will:

➢ prioritise, in the upcoming EMS work plan, the development of sustainable and green short sea shipping hubs and links, promote collaboration between ports, with a focus on smaller ports, the upgrade of maritime infrastructure, and integration with rail and inland waterway transport.

➢ facilitate resilience planning through workshops with other European Transport Corridor Coordinators to explore contingency options for maritime and hinterland connectivity should major ports on key transport routes be disrupted.

Member States are invited to:

➢ play a leading role in setting global technical international standards in relevant international fora, including ISO.

➢ prevent, mitigate and tackle the risks associated with foreign ownership and control of strategic dual-use infrastructures and their related operations.

➢ ensure the possibility of gaining temporary public control or right of use of strategic dual use infrastructure, assets or equipment under national law.

➢ ensure that the necessary measures of the Military Mobility Regulation are fully and swiftly implemented, once adopted.

➢ streamline planning and permitting procedures to allow a swift take-up of innovation in ports.

➢ give higher priority to improving the availability and capacity of hinterland connections by rail and inland waterways.

streamline land use planning and permitting procedures to allow a swift development of additional areas for port use.

Sector stakeholders are encouraged to:

➢ support the uptake and distribution of EU funded research, share best practices and developing partnerships and new business models, going beyond specific/local challenges and address market requirements at large, including those of small and medium sized ports.

Member States and stakeholders are invited to:

➢ apply the guiding principles set out in this strategy also to their own initiatives and enhance general coordination and information exchange.

➢ streamline planning and permitting procedures to allow a swift take -up of innovation in ports.

➢ give higher priority to hinterland connections with rail and inland waterways.

➢ aim for a balance between return on investments for private operators and suitable contractual obligations (duration, transparent and fair conditions for renewals, flexibility clauses) to ensure resilience, security, safety and reduction of emissions.

Pillar II – ADVANCE ENERGY TRANSITION, SUSTAINABILITY & CLEAN INDUSTRIES

The Commission will:

➢ in 2026, continue monitoring OPS deployment and in the upcoming Electrification Action Plan, introduce new measures to support port electrification and promote greater transparency of OPS pricing.

➢ use the opportunities of the implementation of T-MED to support sustainable energy connectivity among Mediterranean ports

➢ in the upcoming Energy Union Package, consider how to promote the availability of sustainable fuels in ports.

➢ in the upcoming AFIR revision, consider measures to accelerate the deployment of alternative fuels infrastructure for shipping.

- coordinate Member States' efforts and facilitate exchange of best practices, including possibly through guidelines.
- by the end of 2026, assess infrastructure capacity and future needs for the supply of renewable and low-carbon fuels in and to ports through the RLCF Alliance.
- in 2026, commission a study under the Clean Hydrogen JU, to support the Commission's activities in the Hydrogen Global Ports Coalition.
- as of 2026, support partnerships with ports, local authorities and industrial clusters.
- encourages closer cooperation between ports, energy companies, grid operators and local authorities and is ready to provide informal guidance on antitrust issues.
- by 2027, organise a series of targeted workshops for ports.
- revise the Taxonomy Climate Delegated Act to improve the usability of the Technical Screening Criteria and simplify and update them to reflect relevant policy, legislative and technological developments.
- aim for more consistent emission measuring and reporting in port areas.

Member States are invited to:
- support non-wire technologies and smart-grid solutions, digitalised procedures and better utilisation of existing grid assets.
- promote demand management solutions, especially for small and medium ports.
- strengthen synergies between TEN-T and TEN-E and other electricity network planning and in this context include onshore needs, as reflected in national network development plans in the upcoming Offshore Network Development Plans.
- reflect in national procedures and in the case-by-case assessments the presumption of overriding public interest for electricity grid infrastructure, including OPS in ports.
- allocate a part of EU ETS revenues to maritime decarbonisation investments across the maritime cluster in Europe.
- support structured cooperation between ports and local industrial clusters to promote renewables, energy sharing, reuse of waste heat, storage solutions and the development of port-centred energy communities.
- use, where relevant, the port development-related provisions under the Water Framework Directive and ensure a timely implementation of new environmental rules on sea pollution from shipping in ports.
- address emissions of greenhouse gases and air pollutants in ports in the implementation of their National Energy and Climate Plans and National Air Pollution Control Programmes.

Pillar III – PROTECT & SECURE PORTS

The Commission will:
- by 2027, update existing guidance on maritime security legislation to adequately cover all relevant threats.
- by end 2026, work with the EU Member States towards updated international guidance within the International Maritime Organisation.
- by the end of 2026, present an EU Anti-Corruption Strategy.
- in 2027, propose an EU framework for background checks for port workers .

- ➢ in 2027, extend security efforts to inland ports, including those not covered by the ISPS Code, in cooperation with river commissions.
- ➢ in 2027, publish best practices to prevent drug trafficking and explore further cooperation with candidate countries.
- ➢ by 2027, develop regional frameworks jointly with the EEAS to cooperate with third countries in improving ports security and work on greater alignment of customs controls across EU ports together with better security protocols worldwide.
- ➢ by 2027, work on public-private two-way information exchange between customs and maritime logistics companies.
- ➢ stand ready to assess the extent to which antitrust instruments may support the application of the guidance or best practices developed by the European Ports Alliance.
- ➢ in 2026, put forward a European Integrated Framework for Climate Resilience.
- ➢ as of 2026, support research and development initiatives to secure data exchanges and data storage for ports and stakeholders along multimodal logistics chains.
- ➢ as of 2026, promote and support solutions towards EU sovereignty over data underpinning its vital civil and military transport and seek cooperation with likeminded countries.
- ➢ in 2027, continue cooperating with IMO to advance harmonised global cybersecurity standards for the maritime sector through a non-mandatory Cyber Code.
- ➢ by 2027 update ENISA's Cyber Risk Management Guidelines for ports.
- ➢ by 2027, carry out Union-level coordinated security risk assessment to identify the cybersecurity risks and recommend appropriate mitigation measures.
- ➢ by 2027, create a forum for Member States' cybersecurity and maritime/port authorities to exchange information and best practices.

Member States are invited to:
- ➢ prioritise the implementation of the maritime security legislation, and adopt best practices shared within the European Ports Alliance Public-Private Partnership to combat organised crime (incl. drug trafficking) and corruption and tackle port security in its entirety.
- ➢ prioritise interoperability of ports within the EU rail system as well as the achievement of a "Good Navigation Status" by 2030 for inland waterways.
- ➢ include ports when implementing the Directive on the resilience of critical entities (CER Directive).
- ➢ ensure that critical goods are handled and stored in line with military mobility requirements, the EU stockpiling strategy and the Security of Supply regime introduced by the European Defence Industry Programme.
- ➢ optimise mapping, information sharing and coordination to set up and protect stockpiles and minimise disruptions, considering specific roles for smaller ports.

Member States and stakeholders are invited to:
- ➢ develop climate resilience plans and exchange best practices on climate resilience action in ports.
- ➢ protect and strengthen vulnerable infrastructure, superstructure and equipment and address bottlenecks, enhance efforts to harden their critical infrastructure.

> ensure sufficient redundancy and capacity to absorb short and medium-term disturbances in their logistic chain and supply of critical goods, allowing especially the most vulnerable military mobility nodes to reach adequate operational levels.

The EMS Coordinator will:
> facilitate resilience planning for maritime and hinterland connectivity with other European Transport Corridor Coordinators**.**

Pillar IV – ACCESS TO FINANCE & INVESTMENT

The Commission will:
> apply the funding principles developed in the strategy across all funding instruments, including relevant actions to support innovation in ports under Horizon Europe 2028-2034.
> prioritise support to the development of OPS in ports, in a 2026 CEF call.
> make best use of available funding under the current MFF to support the priorities of the strategy.
> request EIB Advisory, through JASPERS, to deliver capacity building support specifically for small and medium-sized TEN-T ports.
> engage with National Promotional Banks and Institutions and private financial stakeholders to identify additional financing solutions for maritime and inland waterway ports and operators.

The EIB is invited to:
> continue offering financing and advisory support to the sector and stay engaged in dialogue with the Commission, Member States, co-financiers, and industry to advance the priorities of the strategy and improve access to funding and technical assistance for ports and businesses of all sizes, notably to smaller operators, ports and SMEs in the ports sector.

Member States and regions are invited to:
> depending on local needs and circumstances, promote the development of their ports.

Industry stakeholders are invited to:
> pursue forward-thinking, out-of-the box strategies, integrating cutting-edge technologies and innovative sustainable practices.

Pillar V – SOCIAL COHESION, SKILLS & QUALITY JOBS

The Commission will:
> continue to support territorial cohesion and the connectivity of islands and outermost regions, notably the ones with demographic challenges.

- ➢ in 2026, include policy measures to strengthen the economic, environmental and social contributions of ports to local communities in the upcoming Island and Coastal Communities Strategies.
- ➢ as of 2026, strengthen dialogues and support the development of best practices and guidance on enhancing port-city relations.
- ➢ in 2026, support small and medium-sized ports with a specific roadmap (Annex 2).
- ➢ in 2026, publish an energy transition roadmap for EU fisheries and aquaculture.
- ➢ in 2027, help develop a skilled next-generation workforce across all blue economy sectors, including ports, through actions under the Blue Generational Renewal Strategy.
- ➢ by 2027, prepare guidance on the application of maritime safety legislation to port workers on board ships.
- ➢ as of 2026, support further research and guidance on the safe handling of alternative, renewable and low- and zero-carbon fuels in the port area under Horizon Europe.
- ➢ by 2027, prepare guidance and training material on the safe handling of alternative fuels.

Member States are invited to:
- ➢ support infrastructure, clean energy and fuel, safety and sustainability improvements for small and medium-sized ports, notably on islands, in remote and outermost regions.
- ➢ support safety and sustainability improvements in ports and ensure implementation and respect of Union and national labour legislation and collective bargaining agreements.

Social partners and other sector stakeholders are invited to:
- ➢ establish a dedicated skills partnership for the ports sector to support the upskilling and reskilling and inclusion of workers.

The maritime industry is invited to:
- ➢ cooperate with the large-scale partnership for the digital ecosystem in the Pact for Skills in order to support digital upskilling in the ports sector.
- ➢ submit pledges under the Cybersecurity Skills Academy and use the European Cybersecurity Skills Framework (ECSF) tool for port professionals.