

ESPO OPERATIONAL REPORT

**General Assembly
6 May 2026
Gdansk**

**Isabelle Ryckbost
and the ESPO
team**



Content

- **EU Ports Strategy**
- **Work by committee**
- **ESPO Knowledge Network**
- **Communication and studies**
- **ESPO internal**



EU Ports Strategy

Procedure and ESPO's lobby ahead of the publication



Leaked version:

- Problematic proposals on review of concessions rules for ports
- Conditionality of CEF funding (funding if EU legislation is respected)

ESPO bilateral meetings with the Commission
Letters to Commissioners Tzitzikostas and Séjourné
Action of different members

- 4 March: EU Ports Strategy
- Competitiveness more to the forefront
 - Positive narrative about concessions/land lease: recognising need for long-term investments
 - No conditionality for funding

Strategy to be discussed in the Parliament and in the Council
Commission to start implementing (taking into account feedback on Strategy)

EU Ports Strategy

STRENGTHEN COMPETITIVENESS,
INNOVATION & DIGITALISATION

ADVANCE NEW ENERGIES,
SUSTAINABILITY &
REINDUSTRIALISATION

PROTECT & SECURE PORTS

ACCESS TO FINANCE &
INVESTMENT

SOCIAL COHESION, SKILLS &
QUALITY JOBS

- 18 pages
- + Annex I: Funding principles
- + Annex II: A new roadmap for competitive small- and medium-sized ports
- + Annex III: 6 pages of Summary of Actions and Guidance
- **Delayed: the report on the implementation of the Port Services Regulation (2017/352): going in interservice consultation soon**

General assessment



- **Strong and well-written introduction to the Strategy**, the Commission shows understanding about the challenges that ports are facing:
 - Understanding that ports need to **combine their role as competitive trade hubs with their role as public service providers.**
 - Reference to **diversity** which calls for a **broad and flexible approach.**
 - **Changing role of ports.**
- **Global competitiveness and protection/resilience against third countries** prominently present in document.
- **Attention for small- and medium-sized ports as a common thread** through the document(17 references).

General assessment: positive elements



- **Global competitiveness of ports with clear text on EU ETS and the consideration of the risk of traffic diversion to non EU transshipment ports.**
- **GBER: review** in line with ESPO position (open to adapting thresholds – to be seen what is in final version).
- **Extensive part on the need for support to ports** through the **different financing instruments** (CEF, ECF etc.) .
- **Cybersecurity issue** in line with ESPO's position: calling amongst others for a **specific forum** for Member States cybersecurity authorities and maritime/port authorities.
- **Call for Dialogue:** amongst others, creation of **the high-level Maritime Industries and Ports Board.**
- **Clear principles** on support for third countries (a certain conditionality).
- **Vertical integration of large logistics and shipping operators:** Revision of merger guidelines.
- **Permitting and accelerated grid connection for ports.**
- **Use of ETS revenues for greening of shipping and ports (e-fuels and technologies).**
- **Reference to ports as being vital for hydrogen valleys.**
- **Horizon Europe:** support **beyond the pilot phase.**

General assessment: more problematic parts



- **A lot of mapping, guidelines and monitoring in the text: risk of goldplating for ports.**
- In particular **on FDI screening** adding more specific (non-legislative) rules applicable to ports only? ex. on FDI: “establish **thresholds and criteria** for foreign influence, such as influence on strategic decisions, control of operations and dependence of high risk suppliers of equipment” + **closer screening of public funding to entities in ports directly or indirectly controlled by third countries.**
- The Commission **will promote greater transparency for OPS pricing** and better forecasting of demand.
- AFIR: the upcoming revision of AFIR **will consider measures to accelerate the deployment of alternative fuel infrastructure for shipping** => reference to AFIR implies that they look at infra in ports: new mandates? (Reference to « minimum supply obligations for fuel suppliers » has been taken out).
- **Not really the right approach on hinterland connections and rail, in particular to improve the port-rail interface.**



The CY Presidency aims at finalising Conclusions for the Transport Council of June.

Last available text (29 April) looks good: most – if not all – ESPO points have been taken on board:

- Very good cooperation with CY presidency.
- Also support from different delegations in ESPO towards their representatives in the Council. (Thank you!)

One problematic point sneaked in in last version: **on transparency and predictability of OPS pricing.**

=> New proposals ESPO for amending this have been passed to different delegations.

Last Council working group meeting on 11 May.

European Parliament



TRAN committee decided on 5 May to make an INI report about the EU Ports Strategy

Work expected to start after summer.

But overall, clear focus in EP: focus on foreign investments and security threats remains present! But also plea for competitiveness.

ESPO Actions:

- Bilaterals with different MEPs
- Events: BE-NL breakfast with MEPs
- Participation in EPP Ports Summit – 22 April
- 5 MEPs join the ESPO Conference and participate in panel: **Jeannette Baljeu, MEP (RENEW), Willemien Koning, MEP (EPP), Merja Kyllonen, MEP (GUE), Kathleen Van Brempt, MEP (PES), Magdalena Adamowicz, MEP (EPP)**

+ **ESPO actively consulted for opinion from Economic and Social Committee.**

ESPO position



- **First reaction – 5 March**
- **Secretariat gathering more detailed positions from members (committees)**
- **Position paper will follow, but depends also of timing EP (in view of integrating new events, progress on other files, etc. in the position)**



PORT GOVERNANCE AND MANAGEMENT COMMITTEE

Priority files

- **EU Ports Strategy (see above)**
- **Review of the General Block Exemption Regulation (GBER)**
- **Revision of the Foreign Investment Screening Regulation (FISR)**

Upcoming

- **Review of EU Public Procurement framework, including Concession Directive**
- **Port Services Regulation: Commission's implementation report: delayed**

The Foreign Investment Screening (FIS) Regulation



In short	<p>Revision proposal of the Commission in January 2024. Revision of existing FDI Regulation of 2019. = The FIS Regulation sets the framework for the screening of foreign investments in selected sectors, including ports.</p> <p>The Regulation foresees to:</p> <ul style="list-style-type: none">• Make an FDI system mandatory in all Member States (- currently having a national screening mechanism is voluntary).• Introduce a minimum sectoral scope for all Member States - includes investments in ports (more details in next slides).• Extend scope to cover all foreign transactions within the EU (not only direct investments).• More harmonised rules for national screening mechanisms and for cooperation with the COM and other Member States.
Timing	<p>EP and CO reached political/provisional agreement in December 2025.</p> <ul style="list-style-type: none">• EP expected to endorse the final text in plenary session of 18 May 2026; afterwards, adoption in Council.• July 2026: (provisional) entry into force of the Regulation;• Jan 2028: (provisional) application of the Regulation (after 18 months' transition period).
Work done ESPO	<ul style="list-style-type: none">• Active dialogue with COM/DG TRADE, makers of the proposal, incl. to assist in further defining scope for ports• Support EP in the background• Discussing FDI/FIS in framework of EU Ports Strategy – DG MOVE Port Unit
Position ESPO	Support for Commission proposal : position paper (find here)
Next /Further steps	<p>Follow up in light of final text & discussion with members on future implementation; Avoid additional layers in discussion (in EP/CO) of EU Ports Strategy</p>

Scope screening FDI



DISCRETION MEMBER STATE: taking into account assessment in the framework of critical entities directive (CER),
Examples are port managing bodies of core ports, providers port services (PSR definition) + other entities within the CORE PORTS when these are essential for the security and continuity of operations of such core ports

GREENFIELD INVESTMENTS are excluded

Preliminary agreement – **Minimum Scope** (Article 4)



Article 4(4) establishes which foreign investments are subject to a prior authorisation requirement (= minimum scope for each national screening system). These include foreign investments where the Union target:

(bc) is active in the transport, energy or digital infrastructure sectors and is considered critical pursuant to a risk-based targeted assessment performed by the Member State where that Union target is established. This assessment shall take into account national security and vital societal functions in light of the essential services such Union target provides;

→ Please note (Article 3(2a):
Member States must respect
minimum scope, but **can choose
to go beyond!**

This Article must be read in conjunction with **Recital 20(b)**:

*(20b) The common minimum scope should also include foreign investments in Union targets that are active in the transport, energy or digital infrastructure sectors **but only to the extent they are considered critical** following a risk-based, targeted assessment carried out by the Member State [...]. Member States should **retain discretion to designate the entities concerned** within those sectors and should, as appropriate, **take into account assessments carried out pursuant to [CER II Directive]**. [...]
Examples of entities to be assessed include: [...] (b) in the transport sector: [...] **managing bodies** within the meaning of the [PSR] **of core ports or providers of port services** within the meaning of that Regulation and **other entities** within the core ports, **when these are essential for the security and continuity** of operations of such core ports”*

Preliminary agreement – Greenfield investments (Article 4)



According to **Article 4(5)**: greenfield investments are **excluded** from the minimum screening scope!

5. *Paragraph 4 shall not apply to greenfield investments.*

➤ Yet, according to **Article 3(2a)**, Member States “*may decide that the screening mechanism applies also to **foreign investments** falling within the scope of this Regulation **other than those referred to in Article 4(4).***”

Definition greenfield investments – **Article 2(3a)**:

(3a) *‘greenfield investment’ means a foreign investment carried out through the establishment of new facilities or of a undertaking for the performance of an economic activity in the Union;*

- **Inclusion/exclusion of greenfields** in mandatory scope was one of **main sensitive points!**
- Final decision to **exclude** greenfield investments from the minimum scope (why? attracting actual new investments & perceived as less risky), yet **Member States may go beyond** the minimum scope and **can decide to include** greenfield investments.

Preliminary agreement – Scope for ports



Hence, what would this mean for foreign investments in ports?

(1) **'Classical' foreign investment** in ports where e.g. a foreign investor takes a stake in an existing terminal:

- If this existing terminal (= Union target) is perceived as being critical following the Member State's risk-based assessment, the foreign investment in this existing terminal is subject to prior authorisation and must be screened.
- According to COM/DG TRADE, recital (20b) with the reference to **core ports and port services** within those core ports is merely meant as a **recommendation** / political guidance, i.e. Member States can go beyond and also include **comprehensive ports** if these are deemed as critical following their risk-based assessments.
- COM/DG TRADE mentioned that Member States are expected to focus particularly on / include into their screening scope the **entities they identified as critical in the framework of CER II**.

(2) **Greenfield port investment** where e.g. a foreign investor (e.g. COSCO) establishing a new terminal or a new company that installs itself in the port:

- Such greenfield port investment is **not** part of the minimum scope and thus Member States are **not obliged to screen it**, however **in case they do include** greenfield investments, then the screening process **must comply with the provisions** of this Regulation.

Preliminary agreement – **Minimum Scope** (Article 4)



Minimum scope – potentially applying to ports **indirectly** – includes also foreign investments where the Union target: ***(Can be relevant for investments in the PORT AREA)***

- Develops, produces or commercialises **dual-use items** subject to export control (Annex I - Reg. 2021/821);
- Develops, produces or commercialises goods and technology for **defense-related products** (Annex - Dir. 2009/43);
- Produces, conducts research in or develops **semiconductors or quantum technologies**, or conducts research in or develops **artificial intelligence** (Annex I - FISR);
- Exercises as regards **any strategic raw materials**, exploration, extraction, processing, recycling etc. (Article 2, Annex I - Critical Raw Materials Act).

Preliminary agreement – Other important provisions



- Timelines screening procedures (Article 4):
 - For foreign investments subject to prior authorisation: an **initial screening** review **within 45 calendar days** (following the filing) to decide whether an in-depth investigation is needed. Where necessary, followed by an **in-depth investigation** to determine whether the foreign investment is **likely to negatively affect security or public order**. (→ yet, no deadline for adopting screening decision in case of in-depth investigation!)
 - For own-initiative screenings – for foreign investments **falling within the scope of the respective national screening mechanism and not subject to a prior authorisation requirement** : a national screening authority can screen and adopt a screening decision **on its own initiative** for **at least 15 months** and up to a **maximum of 5 years** on foreign investments.
- Union Cooperation Mechanism (Chapter 3): the Commission and Member States must cooperate and notify foreign investments under several conditions. Member States may and Commission shall give opinions, which are to be taken into account by the host Member State. Yet, **the final screening decision shall be taken by the host Member State!**
(→ EP 'lost' this battle; wanted more far-reaching powers for especially the COM, particularly to be able to issue binding opinions. Yet, this was red line for the Council: very keen on keeping the final decision power in national hands!)
- Filing the foreign investment to the screening authority (Article 2): the **FISR does not provide who has to file** the foreign investment to the national screening authority (i.e. the initial submission of all information/documentation required). The Regulation only refers to the “person who made the filing”.
→ It will be **up to Member States to define who has to file: can be the foreign investor or the Union target.**
- Confidentiality (Article 17): Information received under this Regulation shall be **used only for the purpose** for which it was requested, unless the originator of the information explicitly agreed to another use, and Member States and the Commission must **ensure the confidentiality of the information** they provide or receive.

EU Ports Strategy: reference to FDI / FISR



EU Ports Strategy - the Commission foresees to:

“establish thresholds and criteria for foreign influence, such as influence on strategic decisions, control of operations and dependence of high risk suppliers of equipment”

→ More specific rules applicable to ports (vis a vis other critical infra)??

+ Closer screening of public funding to entities in ports directly or indirectly controlled by 1/3 countries.

Commissioner Tzitzikostas at High level event – 30 April: « Foreign investment in our ports is welcome—and indeed necessary. But openness cannot come at the expense of security. Where foreign ownership or control involves state-backed actors, it may carry strategic risks that we cannot ignore. This is why we will develop clear criteria and guidance, with a focus on ports identified as strategic dual-use infrastructure.»

Industrial Accelerator Act (proposal) takes another FDI approach:

- introduces ban on FDI (specific thresholds and conditions) in specific sectors with possible opt-in
- Greenfield investments are here included

Review of the General Block Exemption Regulation: draft of 25 February

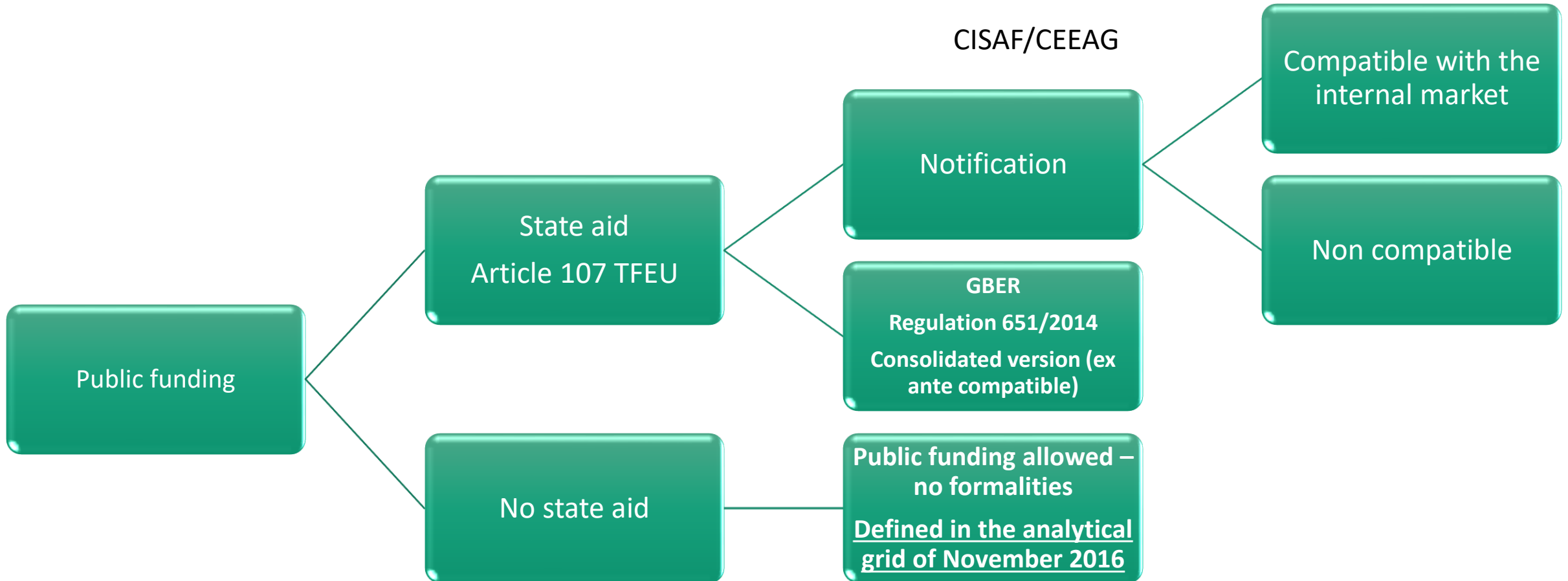


In short	<p>25 Feb 2026: the COM launched a public consultation on the new (draft) GBER (and closed on 23 April 2026). This consultation follows last year's consultation (launched in July 2025).</p> <ul style="list-style-type: none">• Current GBER expires on 31 December 2026. EU action is needed to prolong and review. Aim new (draft) GBER: simplify the GBER to reduce bureaucracy. The overall structure of the new (draft) Regulation changed considerably; the article for ports is now Article 80.• Ports have been included under the scope of GBER following its amendment in 2017, which introduced specific provisions allowing public investment in port infrastructure without prior Commission approval.
Timing	Decision COM has to be taken before end 2026 .
Work done ESPO	<ul style="list-style-type: none">• ESPO position developed in response to the draft GBER, defined together with members, and submitted to the COM in context of the consultation.• Also based on previous ESPO position submitted during last year's consultation.
Position ESPO	Position 23 April 2026: Position of the European Sea Ports Organisation on the Commission's draft for a new General Block Exemption Regulation - Participation in the Commission's public consultation
Next /Further steps	<ul style="list-style-type: none">• Meeting with DG Competition to discuss ESPO position in response to draft (new) GBER.• Follow up with members after final GBER is published.• In light of EU Ports Strategy, meet with EP + CO to ask for support to higher GBER thresholds.

What is GBER?

Clarifications on the scope of State aid rules to infrastructure financing can only be made in other instruments:

- *Notice on the notion of State Aid ("NoA")*
- *Analytical Grids (updated following the adoption of the NoA)*



GBER 2014



```
graph TD; A[GBER 2014] --> B[GBER for ports 2017]; B --> C[GBER MFF 2021 (adapt to certain recovery related aid measures)]; C --> D[Green Deal GBER amendment 2023]; D --> E[Review of GBER by end of 2026 (in light of expiration of current GBER on 31.12.2026)];
```

GBER for ports 2017

GBER MFF 2021 (adapt to certain recovery related aid measures)

Green Deal GBER amendment 2023

Review of GBER by end of 2026 (in light of expiration of current GBER on 31.12.2026)

New (draft) GBER: main points



- **The overall structure of the (draft) Regulation changed considerably.** The article applicable to State aid to ports is now **Article 80** (as opposed to the current Article 56b): **both maritime and inland ports.**
- The approach to ports in terms of **eligible investments** and **maximum thresholds** remains **largely unchanged.**
(→ Yet: EU Ports Strategy: COM will assess whether to increase the thresholds for ports??)
- The Commission seems to have the intention to **make certain types of port superstructure eligible** for State aid – this is not part of the draft new GBER, but is mentioned in the Commission’s **explanatory memorandum:**

“Elements of superstructure in ports can be financed if they are ancillary (i.e. to ensure the functionality of the infrastructure / needed for making it fully operational), exclusively used for the provision of transport-related port services and provided to all port users in an open, non-discriminatory manner.”

- **Article 80** on aid to ports does currently **not contain very detailed provisions**, yet the Commission aims to prepare and include in an **upcoming guidance document** more **detailed provisions on the treatment of port infrastructure and superstructure.**
- In this context, DG COMP is also asking input from ESPO on examples of “**port digital/physical/cyber infrastructure under public powers**” which can also be eligible for State aid. Explanatory memorandum:

*“To the extent that funding of port infrastructure does not fall under the public remit and therefore would not constitute State aid (such as scanning equipment for containers to fight drug smuggling or security fences), **digital, physical or cyber-security infrastructure** (such as electronically operated gates to control entry/exit of trucks) **could be eligible** if it is related to transport port services and made available to all port operators and users in an open, non-discriminatory manner.”*

ESPO position review of GBER



Europe's ports stress **the necessity of a GBER for ports.**

The changing and increasingly public interest role of ports makes it more than ever important to have a proper state aid framework and a solid GBER for ports.

General comments

1. Bring the notion of “state aid” for ports in line with the new realities
2. Adapting the notification thresholds to the market
3. Investments in digital port infrastructure and dual-use infrastructure to be explicitly recognised as ‘port infrastructure’
4. Clarify certain relevant definitions to improve legal clarity of the GBER (e.g. Access infrastructure; start of works; dedicated infrastructure)
5. Need of a mechanism that makes it possible to recalculate and adjust the funding gap
6. Need for criteria for justified splitting and phasing of projects
7. The structure of the draft GBER should be further reviewed and simplified
8. Enhance the stability and longer-term planning through an extended validity of the GBER
9. Aid for refuelling and recharging infrastructure: pragmatic approach

Review of the Procurement and Concession Directives



In short The COM/DG GROW is working on a reform of the EU Public Procurement framework, including the Concession Directive.

Why? a.o. to simplify and to use public procurement as a strategic instrument to push the EU strategic policy agenda (of security, competitiveness, strategic autonomy).

In parallel, the EU Ports Strategy makes a reference to concessions and land leases in ports. The final text of the Strategy was significantly watered down compared to previous draft texts.

Timing Proposals for the reform expected in Q2 2026 (before/around summer!)

- Work done ESPO**
- ESPO contributed to the consultation with an **ESPO position paper** (based on members' input and discussions).
 - A **high-level letter** was sent to Commissioners Tzitzikostas and Sejourné.
 - Several **bilateral meetings** both with **DG MOVE** (Port Unit, Waterborne Director) and **DG GROW** (Procurement Unit, Director for Competitiveness).
 - Bilateral meetings with **MEPs (EP)** as well as **EU Member States Permanent Representations** (Council).

Position ESPO ESPO position January 2026: [review-eu-public-procurement-framework- espo-position-call-for-evidence -january-2026.pdf](#)

- Next/Further steps**
- Await final proposals of the COM and discuss/follow up with members: avoid changes current approach to concessions and land lease in ports of 2014 Concession Directive (Recital 15).
 - Keep an eye on EP (and CO) in context of EU Ports Strategy and explain ESPO priorities/key messages: to avoid too much focus and calls for clarifications/guidelines.

Recall: current approach in 2014 Concession Directive



- To recall: the Concession Directive applies to **concession contracts above EUR 5.35 million**.
- In **terms of port land**, **Recital 15** clarifies that land rental/lease contracts do not fall under the scope of the Directive if they only establish general conditions for the use without procuring specific works or services:

*(15) In addition, certain agreements having as their object the right of an economic operator to **exploit certain public domains or resources under private or public law, such as land or any public property, in particular in the maritime, inland ports or airports sector, whereby the State or contracting authority or contracting entity establishes only general conditions for their use without procuring specific works or services, should not qualify as concessions within the meaning of this Directive**. This is normally the case with public domain or land lease contracts which generally contain terms concerning entry into possession by the tenant, the use to which the property is to be put, the obligations of the landlord and tenant regarding the maintenance of the property, the duration of the lease and the giving up of possession to the landlord, the rent and the incidental charges to be paid by the tenant.*

- The Port Services Regulation makes a direct reference to the Concession Directive. but **distinguishes between concessions as defined by the Directive and land lease contracts**. For land lease contracts, some general principles are established in the Port Services Regulation.

ESPO position – key messages on public procurement



- ESPO supports COM objective to **simplify** the EU rules on public procurement – important port projects are stalled because of complex procurement procedures and lengthy appeal procedures.
- In current geopolitical context, the future EU public procurement should promote **more stability, more time to recoup investments and adequate level of transparency** (to avoid undesirable insights in infrastructures, systems, strategic plans). → Balance needed between need for open market access vs. need for continuity of investment and a strategic approach to market access.
- Support for **stimulating framework** encouraging – rather than obliging – contracting authorities to include **‘Made in Europe’** criteria as well as **sustainability criteria** in public procurement. European alternative or competitive European alternative not always available.
- Decision to **exclude certain (foreign) services or products** from government procurement markets should be made at the right level by means of **binding market access regulation** (instead of imposing on contracting authorities).

ESPO position – key messages on concessions



- High need for continuation of approach of current Concession Directive (2014) towards land leases in ports: important to keep **recital 15**. This approach is more than ever valid and vital for Europe's competitiveness and resilience, given the need for **legal certainty** and **long-term stability** that are key to attract investors to the port.
- For stepping up EU competitiveness (EU ambition), essential to have the right regulatory framework to attract investors to the port:
 - Guarantee a **duration of contract** that allows for a reasonable return on investment.
 - Right terms of contracts if Europe's ports want to **compete with third-country ports**.
 - Crucial that port operators and industries must **continue to invest throughout the duration of the lease contract**
 - Important to allow for **renewal of contracts** if all parties concerned are satisfied.
- Given the current geopolitical context, a right balance must be found between the need for open access vs. need for continuity of investment and a **strategic approach to market access** on the other hand.
- Ports take up more and more public interest and strategic roles. Both **stability and a trustworthy environment** are key factors to enable ports to play these roles. Continuation of supply chains and trustworthy and stable relationship between port managing bodies and port operators are key.
- Last but not least: **use the proper, existing, recently strengthened tools to address foreign influence concerns in ports:** including the Foreign Investment Screening Regulation (FISR), Foreign Subsidies Regulation, CER II, NIS II Concessions are not the proper tool!

Maritime Cabotage Regulation: informal consultation draft Commission Notice



- The Commission (DG MOVE) is **informally consulting ESPO** to receive feedback to **the draft Notice providing guidance to the Maritime Cabotage Regulation** (Council Regulation (EEC) No 3577/92).
 - Deadline feedback to DG MOVE: 29 May 2026.
 - In the draft Notice, the Commission underlines - among others - that **the EU has exclusive external competence to negotiate and conclude international** agreements relating to the supply of certain maritime transport services, and that **Member States are not permitted to open their cabotage market beyond EU shipowners unless empowered by the EU to do so**.
→ *With this clarification, it appears the COM is responding to the wishes from Parliament to be more strict towards maritime cabotage carried out by non-EU companies (incl. Chinese companies; in light of China's strict cabotage laws).*
 - Also, on PSOs and PSCs, the draft Notice points to the **“SNCM test”** = test with a three-step approach, **developed by the ECJ**, to assist Member States authorities in **demonstrating the existence of a real need for public service**.
 - When applying this SNCM test, Member States authorities must apply a **“substitutability assessment”** to **assess whether two ports can be considered substitutes (to determine if there is a real need for public service)**. The Commission provides a (non-exhaustive) list of criteria to be taken into account, including **criteria for ports** (e.g. distance from the original port, port infrastructure and capacity, multimodal connectivity, connections to other key destinations, presence of logistics operators around the comparable port, draft depth, and berthing capacity, turnaround time, port charges and fees, and proximity to main shipping lanes).
- **The secretariat will ask for members' feedback to the draft Notice in an upcoming circular!**

Port Services Regulation: Commission's implementation report



In short	<p>The COM/DG MOVE is still working on an implementation report of the Port Services Regulation (EU 2017/352).</p> <p>DG MOVE has been underlining that it is not the COM's intention to open up the Regulation. The report will be based on a study that it had commissioned to the COWI consortium,</p> <ul style="list-style-type: none">• It highlights that there have been delays in implementing the Regulation in (some) Member States.• It was initially foreseen to publish the PSR implementation report in parallel to the European Port Strategy, yet in the end this did not happen.
Timing	<p>The report was officially due on 24 March 2023, yet is severely delayed: to be published in 2026? (no date confirmed).</p> <p>DG MOVE: the inter-service consultation in the COM will start "fairly soon".</p>
Work done ESPO	<ul style="list-style-type: none">• Ongoing monitoring of the developments in COM.• Exchanges with DG MOVE and COWI consortium accordingly.
Position ESPO	<ul style="list-style-type: none">• ESPO's core message is that the Port Services Regulation was a well- and long-worked compromise (after a process of 20 years) and that it should <u>not</u> be changed, also not in the context of the EU Ports Strategy.• Important to keep an eye on certain elements: implications of OPS as a port service, use of "internal operator" option, state infringement procedures, greening of ports, concession policy.
Next /Further steps	<ul style="list-style-type: none">• In the run up to the publication, ESPO has and will continue to underline ESPO priorities/core message with the Port Unit in DG MOVE.

Intermodal, Logistics and Industry



Priority files

- The new Multiannual Financial Framework 2028-2034:
 - Connecting Europe Facility (CEF III)
 - European Competitiveness Fund
- Revision of Combined Transport Directive: stalled

Follow up/Implementation

- Implementation new TEN-T Regulation
- Upcoming EU Funding opportunities (CEF/IF)
- Rail Capacity Regulation

Priority: The new Multiannual Financial Framework 2028-2034, particularly the Connecting Europe Facility and the European Competitiveness Fund



In short	<ul style="list-style-type: none"> Both Council and the Parliament are working on their respective positions on the MFF files – particularly on the Connecting Europe Facility (CEF III) and the European Competitiveness Fund (ECF). To recall: in 2025 (July), the Commission adopted the proposal for the next Multiannual Financial Framework (MFF): the budget for 2028-2034 of circa EUR 2 trillion. The COM proposes a total budget of EUR <u>81.4 billion</u> for CEF III, including EUR <u>51.5 billion</u> allocated to transport (including 1/3: EUR 17.65 billion dedicated to military mobility) and EUR <u>29.9 billion</u> allocated to energy. A total budget of EUR <u>451 billion</u> is proposed for the ECF.
Timing	Negotiations 2026-2027. Start of EU MFF 2028-2034 from January 2028 (tbc) .
Work done ESPO	<ul style="list-style-type: none"> ESPO position papers on CEF (find here) and ECF (find here). COM: Exchanges with relevant COM officials & contribution to COM stakeholder consultations (incl. on CEF III). Parliament: ESPO press release (find here) in reaction to draft TRAN/ITRE report on CEF & ESPO amendments (not public) provided to selected MEPs in the TRAN/ITRE committee, in line with ESPO priorities. Council: ESPO leading the initiative of EU’s transport sector (“CEF Coalition”), e.g. an open letter to EU Member States (see here).
Position ESPO	<ul style="list-style-type: none"> <u>Priorities CEF III</u>: ports inherently cross-border (TEN-T), proposed budget is a minimum, a strong dedicated budget for ports, role of ports in military preparedness, apply the geostrategic criterium to integrate ports in the TEN-T, ports as energy hubs (energy systems core infra, pipelines, CO2 infrastructure etc.), simplify funding applications. <u>Priorities ECF</u>: ensure that ports are eligible for funding under ECF (as confirmed in the Ports Strategy) and are recognised as beneficiaries under the relevant actions under Chapters IV, VI and VII.
Next/ Further steps	<ul style="list-style-type: none"> Council: ESPO will continue its efforts to influence the budget discussion (the figures) in the Council, incl. via CEF Coalition. Parliament: continue dialogue & work constructively with key MEPs (incl. with rapporteur Oihane AGIRREGOITIA MARTÍNEZ on CEF), to ensure amendments (CEF + ECF) are taken into account.

Other
erationEU
payment)

16%

ope

1%

EU

%



Total
€2 trillion

National and
Regional
Partnership Plans

48%

European
Competitiveness
Fund (incl. Horizon Europe)

Commission européenne
European Commission

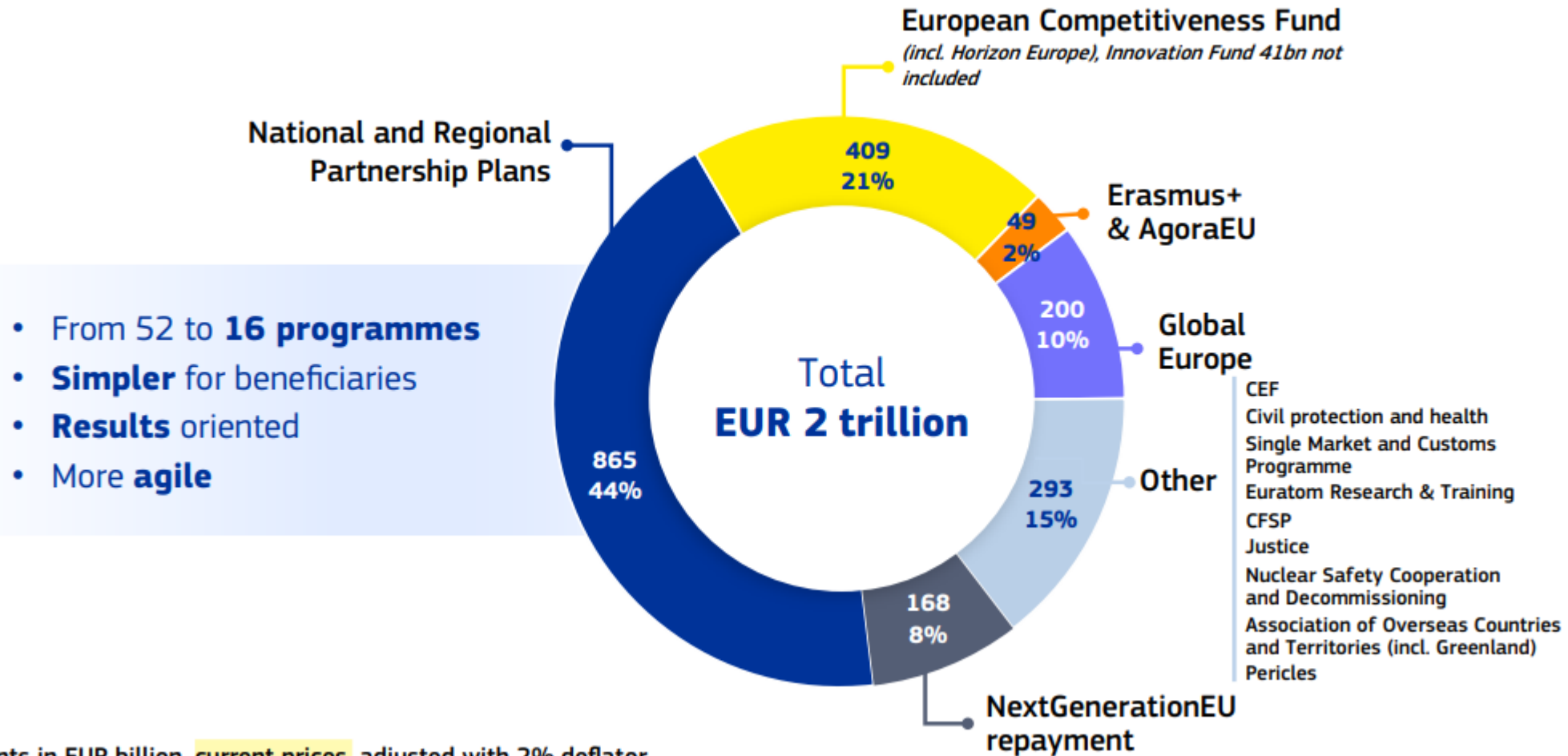
▶ From

▶ Sim

▶ Res

▶ Mo

Recap: COM proposal new EU budget (MFF 2028-2034)



All amounts in EUR billion, current prices, adjusted with 2% deflator

CEF III: state of play Council



Council adopted its position (“Partial General Approach”) on CEF III on 15 December 2026 (see more info in [C-4822](#) and [C-4797](#)).

Main points of Council position:

- 1. More flexibility - no exhaustive list of eligible projects in Annex** (Recital 4 & 6), including when it comes to **dual-use infrastructure**: Council refrains from making strict choices in the Regulation when it comes to which projects should be eligible for CEF funding, and rather wishes to have flexibility later on in choosing which projects are to receive support.
- 2. Eligibility of ports** (Recital 4): Council confirms the Commission’s approach to identifying TEN-T ports as having **a cross-border** dimension and therefore as being ‘eligible’/ ‘priority’ for CEF support.
- 3. Eligibility restrictions for military mobility actions** (Article 9 par 4 and 8(g)): In award procedures, eligibility restrictions should apply to high-risk suppliers for security reasons and that particular consideration shall be given to military mobility actions.
- 4. Reference to carbon leakage, in context of EU ETS** (Recital 31): Council states that while the CEF Programme should be open for cooperation with third countries, *“it should also ensure a level playing field in maritime transport by preventing carbon leakage”*.
- 5. More focus on island regions/countries** (Recital 4): *“The geographical specificity of each Member State, in particular island Member States, should be taken into account when considering the cross-border dimension of projects eligible for funding [...]”*

Note: **Budget amount** (Article 4): No position at this stage – will be part of the future horizontal negotiations on the MFF numbers.

Parliament: key players in TRAN



Oihane AGIRREGOITIA MARTÍNEZ 

Renew Europe Group

ES



Martine KEMP

EPP, LU



Roman HAIDER

PfE, AT



Kai TEGETHOFF

Greens, DE



Rosa SERRANO SIERRA

S&D, ES



Roberts ZĪLE

ECR, LV



Merja KYLLÖNEN

Left, FI

Parliament: key players in ITRE



Kamila GASIUK-PIHOWICZ 

Group of the European People's Party (Christian Democrats)

PL



Yannis MANIATIS

S&D, GR



Pascale PIERA

PfE, FR



Beata SZYDŁO

ECR, PL



Barry ANDREWS

RE, IR



Jutta PAULUS

Greens, DE



Nikos PAPPAS

Left, GR

Parliament: draft report TRAN/ITRE



Early April, the draft TRAN/ITRE report was published, prepared by co-rapporteurs Oihane Agirregoitia Martínez (for TRAN) and Kamila Gasiuk-Pihowicz (for ITRE) (find more info in [C-4938](#)): the draft report contains various positive proposals and **multiple references specifically to ports.**

Main points of draft TRAN/ITRE report:

- **Separate paragraph dedicated to ports** in explanatory statement: *“CEF should recognise the **strategic importance of certain infrastructure, such as ports**, serving not only as key nodes for freight transport but also as energy hubs and dual-use assets, as illustrated by major European port operations.”*
- **New dedicated recital on maritime ports** (Recital 4a): Underlining the importance of maritime ports (entry and exit points, geostrategic role, cross-border multimodal nodes, transport hubs, gateways for trade, industrial clusters, military mobility, energy hubs, diversification of energy supplies, accelerate the roll-out of shore side electricity supply and renewable energy etc.).
- **References to ports in new article with actions eligible for CEF support** (new Article 9a): Ports are often separately mentioned (e.g. AM 62 + 45).
- **Cross-border nature of ports** (Recital 4a, AM 23 + 62): The draft report confirms and clarifies in various locations that cross-border infrastructure in the transport sector should be understood to include ports.
- On **distribution of funds** between sectors (new Article 9a): The draft report asks for a distribution (defined in the multiannual working programmes) of the “budgetary amount **by sector, by priority or objective and by type of action**”.
→ vs. **ESPO proposal for a dedicated budget for ports / demarcation per mode of transport: in ESPO amendments.**

Draft report TRAN/ITRE: CEF military mobility support



CEF military mobility support to port dual use projects (Article 3): The draft report specifies that support to military mobility should go not only to the 500 hotspot projects, but also to facilitate **investment in port dual use infrastructure**.

Proposal for a regulation

Article 3 – paragraph 2 – point a a (new)

Text proposed by the Commission

Amendment

(aa) in relation to military mobility:
(i) to facilitate investments for the timely upgrade to military mobility requirements of those parts of the Military Mobility Corridors identified by the Commission and the Member States as urgent targeted short-term investments (500 hotspots) that are to be implemented as a matter of priority pursuant to Article 32(3) of Regulation (XXX) [on military mobility].

(ii) to facilitate investments in those ports and airports identified as strategic dual-use transport infrastructure in accordance with Article 33 of Regulation (XXX) [on military mobility] and which are identified as crucial for military mobility;

!!

- **i.e. ports that do not have TEN-T status can still be eligible for funding from the CEF Military Mobility envelope, in case they are identified by their Member State as strategic dual-use!**
- Not 100% identical to ESPO priority: asking for important military mobility ports to get TEN-T status.
- ESPO counter proposal (see later slides).

Draft TRAN/ITRE report: “written agreement between MS”



The draft report adds new Article 9a, outlining **which actions (works/studies) can be eligible for CEF support.**

→ i.e. increasing the role of the Parliament in defining priorities and overseeing implementation, instead of full discretion to the Commission by means of delegated acts.

In this new Article 9a, the co-rapporteurs state that: **actions involving a cross-border section shall be eligible only if there is a written agreement between the Member States concerned**, or between the Member States and involved third country.

→ It is not fully clear how this would in practice to port projects, as (in most cases) only one Member State would be involved.

Yet, given the fact that throughout the report it is stated that ports are to be considered as cross-border, including in this particular Article 9a, this provision **could be targeting also port projects.**

→ Rapporteur says that this is **particularly intended for cross-border rail projects.**

→ ESPO counter proposal to clarify this (see later slide).

ESPO response to draft report: ESPO amendments



In response to the draft report, **ESPO prepared text suggestions/amendments** – based on ESPO priorities and members' feedback – which were shared with a selected group of MEPs (see more info in [C-4938](#)).

These amendments included:

- **Apply the geo-strategic criterium for ports** – introduced in the latest TEN-T review (Art. 58(1)(b)) – to ensure that key strategic ports, including for military mobility, are systematically integrated in the TEN-T network.
- Call for a **demarcation of dedicated budgetary amounts per sector and mode and node of transport** - including a dedicated budget for ports – is crucial and should be **fairly balanced, reflecting the strategic importance and public interest responsibilities of the respective sectors.**
- **Clarify** that the **written agreement requirement by Member States** for cross-border sections (introduced in the draft report) **applies to land transport connections** and is not relevant to infrastructure projects that are located within a single Member States.
- Ensure that the **maintenance of infrastructure is an eligible action** under the CEF programme (in order to supporting the long-term performance and resilience of existing infrastructure and ensure the longevity of past and future infrastructure investments).
- Eligible actions under CEF should include **pipelines and infrastructure for transporting CO2.**
- **Port energy systems** should not be considered as secondary elements of transport projects, but as core infrastructure enabling the electrification and decarbonisation of the TEN-T network.

European Competitiveness Fund (ECF)



[ECF Proposal 2028-2034](#) - **EUR 451 billion** (*including EUR 41.2 billion from Innovation Fund)

FOCUS:

- Scaling up and deployment of cutting-edge **innovative** solutions for the decarbonisation, digitalisation, sustainability and resilience of transport and energy
- Clean, multimodal and digitalised, safe transport and mobility solutions**, including infrastructure (also **ports**)

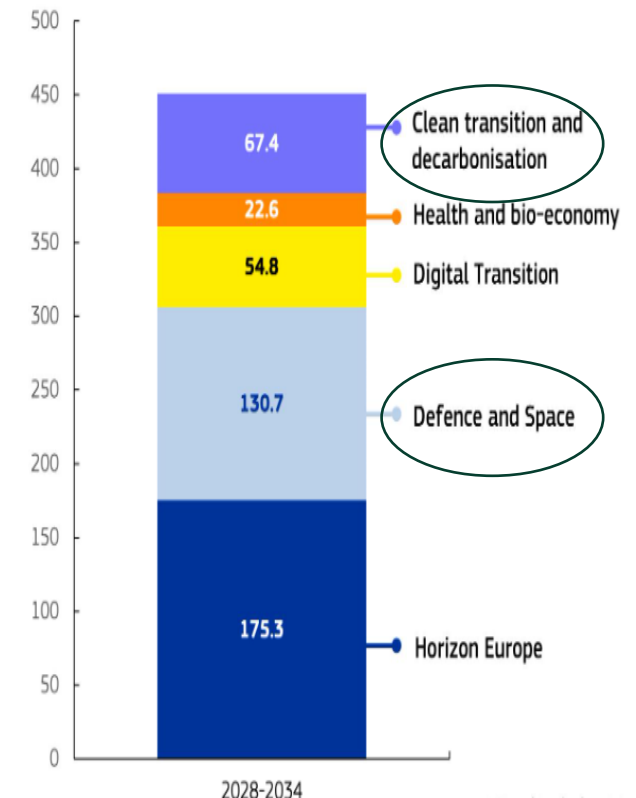
4 POLICY WINDOWS:

- 1. Clean Transition and Industrial Decarbonisation (EUR 67.4 billion)**
2. Digital Leadership (EUR 54.8 billion)
3. Health, Biotech, Agriculture and Bioeconomy (EUR 22.6 billion)
- 4. Resilience and Security, Defence Industry and Space (EUR 130.7 billion)**

Horizon Europe proposal (part of ECF) – **EUR 175.3 billion**

More information: [C-4731](#) + [C-4741](#)

In EUR billion,
current prices



2028-2034
Source: [European Commission](#)

EP key players on ECF



Christian EHLER
EPP, DE



Dan NICA 
S&D, RO



Rihards KOLS
ECR, LV



Yvan VEROUGSTRAETE

RE, BE



Benedetta SCUDERI
Greens, IT



Marc BOTENGA
Left, BE



Sarah KNAFO
ESN, FR



Jana NAGYOVÁ
Pfe, CZ

ESPO position on ECF



General messages – including:

- Bolstering Europe’s **competitiveness** can only be achieved if **Europe’s seaports are sufficiently supported, further strengthened and empowered**.
- Ports and their infrastructure are an indispensable part of the value chain, as there can be no competitiveness without well connected **supply chains and state-of-the-art infrastructure** (both physical and digital).
- **Ports are hubs of energy** as well as **cluster important industries and/or are the transit towards these industry clusters** in the direct hinterland.
- The European port sector is **highly capital intensive** and has **high investment needs**.

ESPO suggestions for particular chapters:

- Given the aim the Fund is pursuing, ESPO believes **that ports should be fully recognised as beneficiaries of the relevant actions under Chapters IV, VI and VII** of the proposal for a European Competitiveness fund.
- As such, ESPO suggestions introduced under the following windows: the **Clean Transition and Industrial Decarbonisation** (Chapter IV), the **Digital Leadership** (Chapter VI), and support for **Resilience and Security, Defence industry and Space** (Chapter VII).

Revision Combined Transport Directive: stalled



In short	<ul style="list-style-type: none">▪ The revision of the Combined Transport Directive is currently stalled: file particularly stuck in Council, no political wish to continue the work.▪ To recall: On 7 November 2023, COM published its proposal to revise the existing Combined Transport Directive (CTD) (92/106/EEC). The CTD sets the European framework to support intermodal transport and thus <u>to incentivise the modal shift</u> from road to lower emission transport modes, including inland waterways, short-sea shipping and rail in Europe. <p>(This revision is/was the <u>3rd attempt</u> to amend the 1992 Directive, which is considered outdated and limited in scope. The Commission proposals for a revision of the legal act in 1998 and in 2017 were both withdrawn.)</p>
Timing	Currently no progress on this file: Commission's intention to withdraw the file. Not formally withdrawn yet, since EP opposes the withdrawal.
Work done ESPO	<ul style="list-style-type: none">- Various meetings with members, including ILICO meetings and dedicated online meetings.- ESPO's position on the revision of the Combined Transport Directive (find here).- Engaging with the co-legislators and relevant stakeholders. A signed a joint statement with the sector (find here).
Position ESPO	<ul style="list-style-type: none">- The proposal is too complex and risks to not solve the problems that currently exist: a simple approach is needed to remove legal uncertainty and avoid unnecessary complexity.- Prioritise support for investments in state-of-the-art combined and multimodal infrastructure and equipment in order to ensure an approach that comes to the benefit of all.
Next/Further steps	<ul style="list-style-type: none">- Monitor movement on this file: follow-up Commission's intention regarding withdrawal.- Engaging with stakeholders to discuss a new course of actions in light of the potential failure of the third attempt to revise the CTD.

Implementation: new TEN-T Regulation



In short	<ul style="list-style-type: none">• DG MOVE & the TEN-T Coordinator for the European Maritime Space (EMS) Gesine Meissner are currently working on the <u>new EMS Work Plan for 2026</u>.• To recall: The new TEN-T Regulation - adopted on 13 June 2024 and entered into force on 18 July 2024.• DG MOVE to manage and monitor implementation of the new guidelines.
Timing	Implementation phase. In 2026, the new EMS Work Plan will be adopted - expected for mid-July : currently, the Commission/EMS Coordinator is requesting Member States for their feedback .
About the Regulation	<ul style="list-style-type: none">• The TEN-T Regulation lays down the criteria for ports to become part of the TEN-T network and sets ambitious infrastructure standards (e.g. for rail connections, one open access multimodal freight terminal etc.) that those ports having TEN-T status have to comply with.• Cross-border character of ports recognised in recital.• Annex II lists all the maritime ports (327 in total) which are part of the TEN-T network.• New energy-based criterium for ports to get TEN-T status (Art. 25) - A few ports entered the network on the basis of this new criterium. Also new geo-strategic criterium for ports to be integrated in the TEN-T network (Art. 58).• Strengthening of the maritime dimension – new concept ‘European Maritime Space’.
ESPO priorities & work done	<ul style="list-style-type: none">• Recognition of the energy role of ports: adding an energy-based criterium to the existing criteria for ports to become part of the TEN-T network (Article 25). + Recognition of geo-strategic importance of ports (new geo-strategic criterium in Article 58).• Recognition of maritime ports as cross-border multimodal nodes (Recital 54).• Realistic rail infrastructure requirements in ports where it makes sense and avoid too stringent requirements applying to every corner of the port-rail network (Articles 14-20).
Next / further steps	<ul style="list-style-type: none">• Members are invited to inform the secretariat if any of the provisions of the new Regulation are unclear.• ESPO to ask to follow up and implement geo-strategic and energy criterion ports.• Continue dialogue with COM / EMS Coordinator, incl. in EMS forum meetings.

Upcoming EMS Work Plan 2026



DG MOVE & the TEN-T Coordinator for the European Maritime Space (EMS) Gesine Meissner are currently working on the **new EMS Work Plan for 2026**.

- = The first Work Plan developed under the new European Maritime Space concept (under the revised TEN-T Regulation (EU) 2024/1679).
- It assesses EMS development, identifies gaps against TEN-T requirements, and sets priorities and recommendations to make Europe's maritime transport system more *"sustainable, smart, seamless and resilient"*.
- **Important: the Work Plan assesses the compliance of all TEN T maritime ports** (i.e. 327 in total) with the requirements of the revised TEN T Regulation, covering maritime infrastructure, terminal infrastructure and hinterland connections.
- The draft Work Plan concludes that **the most significant challenge with the maritime infrastructure is onshore power supply (OPS)**: *"By the end of 2024, less than 10% of the estimated required OPS connection points were operational. Investments would need to accelerate significantly to meet the timelines set out in the Regulation."*
- **IMPORTANT: Annex I and Annex II looks at the port infrastructure compliance with TEN-T standards within each Member State as well as a port-level analysis map with compliance data for each TEN-T port.**

- The Commission / TEN-T coordinator is currently asking the Member States for their input to the draft Work Plan (**rsvp: feedback to ESPO by 8 May**)
- Members are advised to check the draft Work Plan – including Annex I and II with individual port data – and reach out to their national ministries in case of any incorrect/incomplete information or any other input!
- The publication of the Work Plan is (tentatively) foreseen for mid-July 2026.

Upcoming EU Funding opportunities (CEF & IF)



Subject	EU funding opportunities - under current MFF (2021-2027)
What?	1) CEF Transport : upcoming 2026 reflow call 2) Innovation Fund : upcoming IF2026 call


1) CEF Transport: upcoming 2026 reflow call

Latest indicative timeline:

- COM to finalise working programme and send it to Member States for approval, by end of April/early May.
- **Launch** of the call in **June/July 2026**.
- **Closure** of the call in **October 2026**.
- Decision on selection by March 2027.
- Start of the projects at the latest by June 2027.
- Foreseen budget: **1 billion EUR** (based on reflows), available to the General, Cohesion and Military Mobility envelopes.
- Scope: COM wants to **limit and prioritise the scope** as much as possible, in light of the limited budget.
- The **focus** will be on **mature projects**, with an **implementation time of about 2-3 years**, as the projects must be successfully implemented by the end of 2030.

2) Innovation Fund: upcoming IF2026 call

- IF2026 calls foreseen to include a **dedicated IF Maritime call**.
- **Launch** of the IF2026 calls expected for **Q4 2026**.
- DG CLIMA is organising a **(hybrid) stakeholder event** on the upcoming call on **19 June 2026**.



Are you
ready???

Some good news : on funding

CEF Reflow call in the pipeline: approx 330 million EUR available for ports (tbc)

Short deadline (possible summer)

Focus on OPS and dual use infrastructure (TBC)

Upcoming CEF reflow call: DRAFT Eligible actions for ports



Based on a draft Non-Paper (April 2026) “Amendment of the CEF Transport Multiannual Work Programme 2021-2027, the following actions for ports would be eligible: (→ might still be subject to change!)

1) Under European Maritime Space (General envelope) – with maximum support (per grant agreement) of **EUR 10 million** - the focus would be on:

- Actions (works) **supporting the deployment of OPS and charging infrastructure in TEN-T maritime and inland ports** (in accordance with AFIR);
 - Actions (works) **supporting the fitting or retrofitting** of the energy systems of **inland waterway vessels and short sea shipping vessels (incl. ferries)**, with electric, hybrid, H2, ammonia, methanol and biomethane technologies, substitute sources of energy and the installation of wind assisted propulsion systems (WAPS).
- Please note: **grants for the above actions have to be combined with other sources of funding** (e.g. from EIB, national promotional banks, commercial banks) (= **blending obligation**).

2) Under the Military Mobility envelope – with maximum support (per grant agreement) of **EUR 20 million (single country actions)** or **40 million (multi-country actions)** - support would go to:

- **Dual-use works and/or studies along the four military mobility priority corridors**, taking into account the dual-use infrastructure requirements (as set out in Implementing Regulation 2021/1328).
- It is stated that **priority will be given to actions (works/studies) in two or more Member States!**
(Please note that in a previous draft version, only multi-country works/studies were eligible, yet this requirement has been watered down, from being a “criteria” to a “priority”.)

DRAFT Budget

EUR million, current prices



Objective		Call 2026		
		General envelope	Cohesion envelope	Military Mobility envelope
Actions related to Article 9(2), point (a), of the CEF Regulation / Completion of the TEN-T network	Railway projects on the TEN-T core network (including High-Speed Rail)	350	260	
	Inland waterway projects on the TEN-T core network			
Actions related to Article 9(2) point (b), of the CEF Regulation / Modernisation of the TEN-T network	New technologies and innovation: digitalisation of road transport	20		
	Development of alternative fuels infrastructure for the road and airport sectors	130		
	European Maritime Space and inland ports	200		
	Actions adapting the transport infrastructure for Union external border checks	20		
<i>Total 9(2) a) b) actions</i>		720	260	
Actions related to Article 9(2), point (c), of the CEF Regulation / Civilian-defence dual-use (Military Mobility envelope)				130
TOTAL		1110		

→ Approx. **330 mln EUR budget** available to (a.o.) port projects.

DRAFT Co-financing rates & implementation deadlines



The following maximum co-financing rates shall apply to the eligible costs:

- Under the General envelope:

(Studies: 50%) (→ Studies in brackets, since the focus of the European Maritime Space as part of the General envelope is on works, not studies)

Works: **30%** (or 50% under certain conditions, e.g. actions supporting inland waterways, actions supporting new technologies and innovation)

- Under the Military Mobility envelope:

Studies **50%**

Works: **50%**

Important: maximum duration of actions to be financed under the three envelopes apply, these are:

- **31/12/2029** for studies;
- **31/12/2030** for works.



INNOVATION FUND

Deploying innovative net-zero technologies for climate neutrality



Funded by the EU
Emissions Trading System

Innovation Fund: IF2026 calls, incl. dedicated Maritime call



- **Innovation Fund** = EU funding programme for the **demonstration and commercialisation of innovative net-zero and low-carbon technologies**
 - Supported by revenues from the **EU ETS**.
 - Includes innovative (port) infrastructure projects.
- **UPCOMING: IF2026 calls**, foreseen to include a **dedicated IF Maritime call**.
 - **Launch** expected for for Q4 2026.
- DG CLIMA is organising a **(hybrid) stakeholder event** on the upcoming calls for 2026 (“IF2026 calls”): on **19 June 2026**.
 - To exchange views on the upcoming **IF2026 calls** for proposals and to provide input on the Commission’s designs.
 - **Members are invited to participate!** See [here](#) for more information.
 - The ESPO Secretariat – Philippe Putman – will attend.
 - **Any input on priorities for ports for the upcoming IF Maritime call can be send to Philippe!** See more information in [C-4894](#).



New Rail Capacity Regulation



In short	<ul style="list-style-type: none">• Regulation on “the use of railway infrastructure capacity in the single European railway area” (2023/0271(COD)). The Regulation aims at achieving a better management and coordination of rail traffic in Europe.• The new rules are intended to optimise the use of the EU’s rail network, improve cross-border coordination, and increase punctuality and reliability.
Timing	<ul style="list-style-type: none">• Council and Parliament reached a political agreement (“preliminary agreement”) on the final text of the Regulation by end of 2025. Both co-legislators are expected to formally adopt the preliminary agreement in the coming weeks.• Foreseen entry into force: around summer 2026.
Work done ESPO	<ul style="list-style-type: none">• ESPO’s position together with EFIP on the Rail Capacity Regulation (find here).• Engaging with the co-legislators and relevant stakeholders, including bilateral meeting with Rail unit in DG MOVE.• Discussion in latest ILICO meeting on final text and impact on ports.
Position ESPO	<ul style="list-style-type: none">• Europe’s ports are instrumental in effectively boosting rail freight in Europe.• Need for a formal and structural means of consulting port authorities within the framework of RCR, to ensure effective cooperation between port authorities and national rail infrastructure managers on port-rail related matters.• EU legislation should take into account the diverse and complex rail governance systems in EU’s ports.
Next steps	<ul style="list-style-type: none">• Inform members as soon as the final Regulation is formally approved and adopted.• Follow-up the implementation with members: members are invited to provide any comments/questions/difficulties as regards the implementation of the final Regulation, as the secretariat can always ask DG MOVE for further clarification.

Rail Capacity Regulation: main elements of the final text



Final text (“preliminary agreement”) – main elements:

- **The infrastructure managers in each EU country will remain the primary institution** responsible for planning and managing rail infrastructure and traffic, as well as allocating the railway capacity slots.
→ EP wanted more power for European Network of Infrastructure Managers (ENIM), yet CO against and keen on keeping the national infrastructure managers in charge!
 - Yet: According to **Article 54**, infrastructure managers will have to **take into account the guidelines** developed by ENIM, aimed at better coordinating cross-border capacity and traffic through an EU framework.
 - These guidelines are **not** binding, and Article 56 (1a) clearly states that **ENIM shall have no policy-making or regulatory powers**.
- In line with **Article 55a**, railway stakeholders other than infra managers – such as railway undertakings, operators or rail-related service owners, **including in ports** – will be able to set up **a European Railway Platform (ERP)**, which will act as a consultancy body for ENIM.
 - Aim: to provide opinions to ENIM, yet these will **not** be binding. → No real decision-making powers for railway stakeholders, incl. ports!
- **Article 29** on Cooperation with rail service facilities: **obligation on infrastructure managers and operators of service facilities (e.g. terminals in ports) to coordinate the capacity !**
+ in light of this: **obligation** on the service facility operator to **provide information on the available capacity** to the rail infra managers.

Rail Capacity Regulation: main elements of the final text



Final text (“preliminary agreement”) – main elements:

- **The infrastructure managers in each EU country will remain the primary institution** responsible for planning and managing rail infrastructure and traffic, as well as allocating the railway capacity slots.
→ EP wanted more power for European Network of Infrastructure Managers (ENIM), yet CO against and keen on keeping the national infrastructure managers in charge!
 - Yet: According to **Article 54**, infrastructure managers will have to **take into account the guidelines** developed by ENIM, aimed at better coordinating cross-border capacity and traffic through an EU framework.
 - These guidelines are **not** binding, and Article 56 (1a) clearly states that **ENIM shall have no policy-making or regulatory powers**.
- In line with **Article 55a**, railway stakeholders other than infra managers – such as railway undertakings, operators or rail-related service owners, **including in ports** – will be able to set up **a European Railway Platform (ERP)**, which will act as a consultancy body for ENIM.
 - Aim: to provide opinions to ENIM, yet these will **not** be binding. → No real decision-making powers for railway stakeholders, incl. ports!
- **Article 29** on Cooperation with rail service facilities: **obligation on infrastructure managers and operators of service facilities (e.g. terminals in ports) to coordinate the capacity !**
+ in light of this: **obligation** on the service facility operator to **provide information on the available capacity** to the rail infra managers.



Sustainable Development

59

Priority files

- Industrial Maritime Strategy
- Implementation ETS + Alignment IMO
- Fuel EU and AFIR implementation & revision
- Energy Taxation Directive
- 2040 climate target - European Climate Law
- Environmental Omnibus
- Water Resilience Strategy

Upcoming

- Environmental Omnibus
- The review of the Maritime Strategy Framework Directive (MSFD)
- European Climate Resilience and Risk Management
- Implementation report Port Reception Facilities

Priority: EU Industrial Maritime Strategy



- | | |
|-----------------|--|
| In short | <ul style="list-style-type: none">▪ Non-legislative▪ Main aim: stimulate EU maritime manufacturing and shipping:<ul style="list-style-type: none">• Build, Equip & Repair• Transport & connect• Secure and Protect• Access through: Innovation, Finance and investment and skills & Quality Jobs |
|-----------------|--|

Timing	4 March 2026 – launched together with EU ports Strategy
---------------	--

- | | |
|-----------------------|--|
| Work done ESPO | <ul style="list-style-type: none">• Position paper• Shared for comments with members (C-4908 & C-4876)• Proposed addenda and monitoring of the Draft Council Conclusions (on bunker infrastructure and market demand; reflow of ETS money to ports and simplification of reporting obligations in collaboration with the maritime and port industry. |
|-----------------------|--|

Position ESPO	Recommendations of ESPO to the call for evidence (July 2025)
----------------------	--

Next /Further steps	Monitoring of the Draft Council Conclusions and follow implementation
----------------------------	---

Priority: ETS Maritime: review



In short

Shipping in EU Emission Trading System (ETS) → Legislation is final: Directive (EU) 2023/959
EU ETS for shipping is in place since 1 January 2024

Commission: DG Move & DG Clima
REVIEW ETS ongoing → planned Q4 2026

Timing

Phased-in period: buy allowances for 40% of emissions in 2024, 70% in 2025, 100% in 2026
Review by end 2026: threshold GT (from 5000 to 400); ship types (offshore ships)

Work done ESPO

- Active participation in ESSF Sub-group on the implementation of MRV and ETS maritime
- Passing all examples and proves of carbon and business leakage to the Commission
- 2 Meetings with the CLIMA Unit - with FEPORT (EC Polona Gregorin)
- Presented the first results of the EU ETS Observatory together with Puertos del Estado 20/02/26
- Input on Panteia study (DG MOVE) and workshop 4/05/26

Position ESPO

Safeguard EU ports competitiveness, signal carbon and business leakage. Call for global approach (alignment with IMO) and extension of the list of EU neighbouring ports
No extension to smaller vessels and other ship types

Next /Further steps

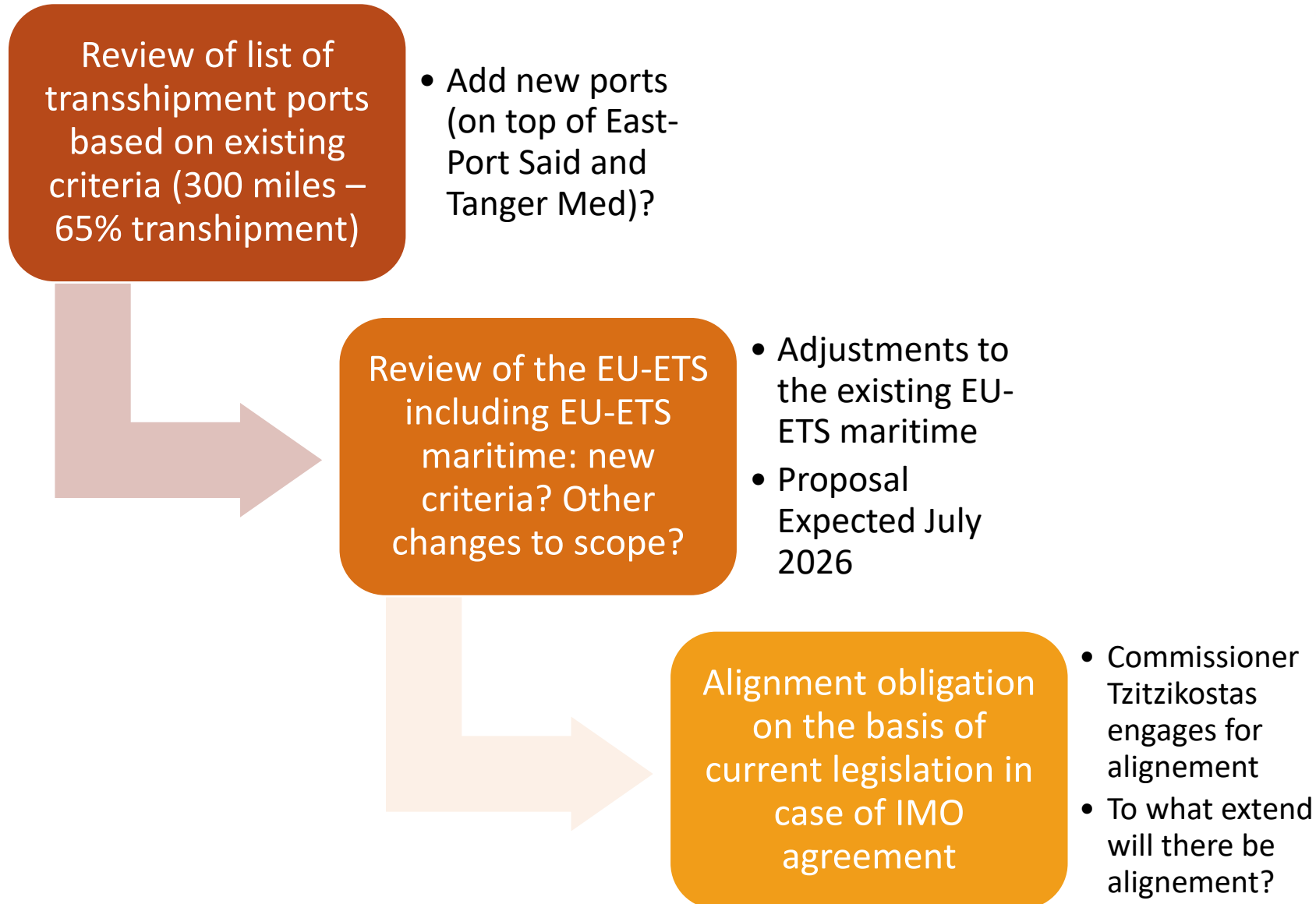
Internal position paper tbc
ESPO at High level meeting DG CLIMA 12 May on the review
Continuous discussion with DG MOVE and DG CLIMA
Await and monitor commission text proposals before summer

ESPO Position on ETS review (C-4949)



- We support ambitious climate action, but the current ETS design is distorting competition
- Clear evidence of carbon & business leakage: route changes, traffic shifts, loss of EU port competitiveness
- No global IMO agreement → EU ports face unequal conditions vs non-EU competitors
- Key asks for the 2026 review:
 - Do not extend ETS below 5,000 GT
 - Revise neighbouring ports list (300-mile radius, remove (65%) transshipment threshold)
 - Exclude genuine transshipment calls from ETS (how to identify these calls? TBD)
 - Reinvest a dedicated share of ETS revenues in port & maritime decarbonisation
- Goal: keep climate ambition high while restoring a level playing field for EU ports

Review ETS: What is legally possible?



MEPC-ES: IMO mid-term measures (new GHG strategy 2023)



In short	<ul style="list-style-type: none">• Agreement on global Net-Zero Framework at MEPC83 (April 2025)• MEPC-ES (October 2025): Initially planned to formally adopt the NZF• → Decision POSTPONED (1 YEAR)• MEPC 84 (27/04) outcome: no compromise on NZF, but discussions were constructive (positive compared with MEPC-ES) and NZF is still the basis for negotiations• → MEPC85 (30/11) to prepare MEPC ES.2 (4/12)• EU council calls on members to support the ambitious global NZF
Timing	Initially NZF from March 2027: Entry into force (16 months after adoption). + review every 5 years – unclear if still possible,
Work Done ESPO	Inform members about the process and progression made at IMO Statements ESPO before and After MEPC-ES meeting October <ul style="list-style-type: none">• Europe's ports Call for Swift Adoption of IMO Net-Zero Framework and Strong EU Alignment• IMO: ESPO regrets postponement of the NET Zero Framework for shipping: postponement should not lead to cancellation of ambition
Position ESPO	For Europe's ports the alignment of EU and IMO systems is important. Any double counting should be avoided. → Maximal alignment ETS + FUELEU with Global measures → Push for ambitious global framework

Implementation and review (AFIR – OPS deployment, LNG requirements and fuel infrastructure)



In short	<ul style="list-style-type: none">▪ Regulation (EU) 2023/1804▪ Sets mandatory targets for the deployment of OPS by 2030 in all TEN-T ports<ul style="list-style-type: none">▪ Container (100 calls/year)▪ Ferry (40 calls/year)▪ Cruise (25 calls/year)
Timing	Review by end 2026 (AFIR): Threshold GT (5000 to 400); ship types and size; AF bunkering
Work done ESPO	<ul style="list-style-type: none">• Active participation in ESSF Sub-groups on OPS• Focus on OPS in positions on EU Ports strategy, Industrial Maritime Strategy, STIP and EU grid package• Position paper submitted on the call for evidence from the commission (20/04/26) (C-4947)
Position ESPO	<p>No extension to smaller vessels and other ship types</p> <p>Not asking for extended deadline, but calling for realism about challenges (grid access) and flexibilities</p> <p>Uptake of alternative fuels is market driven and not solved by mandating infrastructure. (no new mandates in AFIR)</p> <p>Open to discuss inclusion of RORO segment when aligned with FUEL EU (user obligation), access to funding and sufficient grid connection.</p> <p>Counter the request for price transparency for OPS in EU Ports strategy + shipping lines (CLIA)</p>
Next /Further steps	Awaiting and monitoring text proposals by the Commission.

Implementation and review (Fuel EU)



In short	Regulation (EU) 2023/1805 Technical measure on the carbon intensity of Fuels used in Maritime – reduction trajectory toward 2050
Timing	Review by end 2027 (FUEM): Threshold GT (5000 to 400); ship types and size; AF bunkering
Work done ESPO	ESPO position 31/03/2025: Europe's ports are getting ready for the market uptake of new shipping fuels Focus on explaining (facilitating) Role of Ports in positions on EU Ports strategy, Industrial Maritime Strategy, STIP and EU grid package Collaboration with Commission through RLCF alliance (renewable low carbon fuels alliance)
Position ESPO	No extension to smaller vessels and other ship types Uptake of alternative fuels is market driven and not solved by mandating infrastructure. (AFIR)
Next /Further steps	Active participation in ESSF- working groups Active engagement on the AFIR Review (2026) as alignment in crucial.

Ongoing: Energy Taxation Directive



In short	<p>Commission proposal for a Council Directive on Energy Taxation COM(2021) 563 on 14/07/21 (non-binding opinion EP, Council decides with unanimity)</p> <ul style="list-style-type: none">• taxation for fuels supplied for use to vessels in intra-EU waterborne navigation (between 2 EU ports) - Tax exemption until 2035 for marine fuels• impact on EU ports with important bunkering activities• Means also extra taxation on top of ETS charge for short sea shipping (SSS) within the EU (↔ road)• Optional and temporary tax exemption for electricity provided to ships at berth (OPS)
Timing	<p>September 2025 – New proposal by Danish presidency: postponement taxation until 2035 + possible tax exemption OPS</p> <p>November 2026: under DK psd → NO progress</p> <p>CY presidency : a general approach for the way forward with the file by June 26. the file is blocked because of other sectors, not maritime.</p>
Work done ESPO	<p>ESPO position 31/03/2025: Europe's ports are getting ready for the market uptake of new shipping fuels</p>
Position ESPO	<p>Plead for mandatory tax exemption for OPS + in favour of certain postponement of taxation</p>

2040 climate target - European Climate Law



In short	<p>Regulation (EU) 2026/667 - into force on 7 April 2026.</p> <p>2040 climate target 90% net reduction on the way to climate neutrality in 2050</p> <ul style="list-style-type: none">• Target 85% reduction be achieved through actual emission cuts within the EU.• Up to 5% can be met using high-quality international carbon credits starting from 2036
Timing	into force on 7 April 2026.
Status	<p>The EU's 2040 climate target is now legally binding</p> <p>Implementation Phase: With the target set, the European Commission is now opening public consultations to design the specific "post-2030 implementation package".</p> <p>This includes upcoming reviews of key policies like the EU Emissions Trading System (ETS and ETS2 for buildings and road transport)</p>
Work done by ESPO:	<p>Inform members about progress and status (C-4878 & C-4689)</p> <p>Focus on implementation Phase (ETS, AFIR, Fuel EU...)</p>

Upcoming: Environmental Omnibus



In short	<p>EU Commission presented the Environment Omnibus, a package of five legislative proposals intended to simplify environmental legislation and reduce administrative burdens for businesses and public authorities. 10/12/2025</p> <p>Key Elements/proposals = Streamlined Environmental Assessments for Permitting (COM(2025)984) - 2025/0391 (COD)</p> <p>Limit timeline of assessment and screening, single point of contact, digital platforms, priority treatment strategic sectors (incl transport and energy infrastructure) and harmonised cross border procedures.</p>
Timing	Projected October 2026
Status	Onder discussion in EP ENVI: Rapporteur MEP Emma Wiesner RENEW (16/03/2026)
Work done by ESPO:	<p>Stress importance of permitting ease: not only with EU words, but also implementation at different levels.</p> <p>Discussed in SD committee (18/3): permitting is an important issue but highly depending on local regulators. Alignment on EU level will take time and no immediate improvement for current projects. Close connection with grid package and Industrial accelerator Act</p>
Next Steps	Monitor legislative file and screening of proposals

Water Resilience Strategy



In short	<p>A comprehensive multi-annual cross-sectoral plan with milestones in 2030 or 2040. Jessika Roswall, Commissioner-designate for Environment, Water Resilience and Circular Economy</p> <ul style="list-style-type: none">• make Europe water-resilient, ensuring that water sources are properly managed and scarcity is addressed: stricter enforcement to reduce pollution from vessels & more monitoring (ex PFAS & micro plastic))• strengthen the competitiveness and innovative edge of our water industry and take a circular economy approach
Timing	Launched June 2025
Work done ESPO	<ul style="list-style-type: none">• High level stakeholder Roundtable (6 March 2025)• Inform members C-4647 (12 June 2025)
Next /Further steps	<ul style="list-style-type: none">• Zero Pollution Stakeholder Platform follow up + registration for the water resilience platform (for NAVI TG)• 2029: Full strategy evaluation and update of targets

Upcoming: The review of the Maritime Strategy Framework Directive



In short	<ul style="list-style-type: none">• The MSFD sets the framework for achieving Good Environmental Status (GES) in EU marine waters. A recent evaluation concluded that the Directive has not yet met its objectives and highlighted shortcomings in implementation, coherence with other maritime legislation, governance, and data/reporting processes.• The revision forms part of a broader EU approach to strengthen ocean governance and is aligned with the Water Resilience Strategy and the upcoming Ocean Act.
Timing	4Q – 2026 Call for evidence public consultation 9/03/26 A Targeted survey 4/04/26
Work done ESPO	<ul style="list-style-type: none">• Share call for evidence and public consultation with members• Develop together with NAVI TG position of navigational waters• Submit position under NAVI TG for public consultation and targeted survey
Position NAVI TG (ESPO)	Core message: sectors are committed to a healthy marine environment, but the revised MSFD must be coherent, predictable, realistic, and supportive of innovation and investment across the maritime value chain.

Upcoming: European Climate Resilience and Risk Management



In short	<ul style="list-style-type: none">• The Commission is developing a new integrated framework for European climate resilience and risk management to help Member States prevent and prepare for the growing impacts of climate change. → balanced policy package• The main objective is to establish a more ambitious, comprehensive and coherent EU approach to climate resilience and preparedness, covering individual Member States and the EU as a whole.
Timing	Open consultation 02/2026 Policy package to be adopted during Q4 of 2026
Work done ESPO	Shared consultation with members Develop and submitted ESPO position (23/02)
Next steps	Monitor progression on the framework
Position ESPO	Harmonised standards, resilience by design across all policies, adequate funding, cross sector coordination and clear mandates, guidance for no regret measures and response and support for local implementation.

Upcoming: Waste reception – Port reception Facilities evaluation report 2026



In short	The European Commission will publish a report on the implementation of the Directive (EU) 2019/883 on port reception facilities for the delivery of waste from ships (PRF Directive)
Timing	2026
Work done ESPO	Shared survey with members to complete
Next /Further steps	Active participation on Waste from Ships Expert Group (next meeting 12/06/26) Follow up on draft PRF implementation report planned in 2026



Trade facilitation, Digitalisation, Security and Geopolitics

Priority files

- Customs Reform
- European Ports Alliance Public-Private Partnership
- EU Pact for Mediterranean
- Global Gateway

Information

- EU Free Trade Agreements / EU-US Trade
- EU-UK relations
- Russia's war against Ukraine: EU Sanctions
- Trusted ICT Supply Chain Framework

Follow up/ Implementation

- EU Maritime Single Window Environment
- Security: NIS II/ CER



<p>In short</p>	<ul style="list-style-type: none"> ▪ Comprehensive EU customs reform proposed by the EU Commission in May 2023 ▪ Key element: new Customs Code (EU) Regulation with progressive implementation by 2034 (initially by 2038) ▪ Main port-related themes: <ul style="list-style-type: none"> ○ Temporary storage (initial COM proposal: 4-6 days instead 90 days: <u>ultimately declined!</u>) ○ Establishment of EU Customs Data Hub (a single customs data IT system ensuring interoperability with EMSWe, Customs Single Window, Port Community Systems)
<p>Timing</p>	<p>Provisional trilogue agreement: 26 March (formal adoption by Q3 2026)</p>
<p>Work done ESPO</p>	<ul style="list-style-type: none"> • Active participation in the Trade Contact Group meetings (COM expert group on customs) • ESPO position on the customs reform • Position papers and joined actions/meetings with other EU associations (<i>maritime cluster</i>) towards MEPs and Council customs attachés/ RESTORATION TEMPORARY STORAGE PERIOD
<p>Position ESPO</p>	<p>Restoration of 90 days duration for temporary storage, EU Customs Data Hub full interoperability, including with PCS</p>
<p>Next /Further steps</p>	<p>Implementation monitoring, including input to relevant delegated acts (e.g. customs processes, Customs Data Hub interoperability)</p>

European Ports Alliance Public-Private Partnership



- In short**
- The alliance launched by the EU Commission in January 2024, aims to combat drug trafficking and organised crime in European ports: key entry points for illicit substances, particularly cocaine, into the EU
 - Its members include private stakeholders from across the maritime supply chain, including **port authorities**, port terminals, shipping lines and public authorities (customs, law enforcement, EU institutions and agencies)
 - Four main pillars/clusters: (1) Operational cooperation, (2) Fighting infiltration and corruption, (3) Enhancing port security (with a focus on the ISPS Code), (4) Innovation

Timing Ongoing initiative

- Work done ESPO**
- Active participation in the COM workshops (*last workshop in March exploring options for the Background Checks of port workers*), continuous dialogue with COM DG HOME (responsible for EPA)
 - Promoting the initiative within **smaller ports**, sharing best practices identified within EPA, facilitating stakeholders' contact
 - Participation in governance (next EPA Ministerial Meeting in July (during the IE Presidency))

Position ESPO Support for the initiative, focus on making it fully operational and practical

Next /Further steps Further engagement with the COM and EPA members (follow-up actions in connection to the EU Ports Strategy: its dedicated pillar on security) and its further operationalisation (e.g. ensuring an efficient communication channel, exploring options for background checks for port workers)
Focus (LIBE committee EP) link EU Ports Strategy

Priority: European Ports Alliance Public-Private Partnership



Subject/issue	European Ports Alliance Public-Private Partnership: COM initiative launched in January 2024 to fight against drug-trafficking across the EU
What?	<p>Main purpose: creation of public-private partnership against drug smuggling and criminal infiltration in ports (bringing together public authorities and private stakeholders)</p> <ul style="list-style-type: none">⇒ PPP as a common response to strengthen the ports' resilience, (corruption and criminal infiltration of ports linked to drug trafficking)⇒ Better implementation of international and EU security standards, innovative tools to detect illicit trade⇒ Improvement of operational cooperation between law enforcement, customs authorities and private operators within port area
Key players?	<p>Public entities (national authorities: law enforcement and customs authorities, European Commission (DG HOME, DG MOVE, DG Taxud) and other EU agencies (e.g. EUROPOL, EUROJUST), private stakeholders: logistics chain: port authorities (35 PA from the across EU), terminals, shipping lines, shipping agents, freight forwarders and other operators within supply chain => non-exhaustive list of members</p>
Main content:	<p>4 clusters of actions: 1) Operational cooperation, 2) Fighting infiltration of organised criminal groups and corruption 3) Enhancing the port security (ISPS code), 4) Innovation, followed by the series of technical workshops</p> <p><i>EU Ports Strategy angle => building on the work of the European Ports Alliance, COM to propose an EU framework for background checks for port workers (in 2027)</i></p>

Priority: European Ports Alliance Public-Private Partnership



Priority: European Ports Alliance Public-Private Partnership (EPA PPP)

Work done/Current state of play	Launch event in Antwerp (January 2024) Technical workshops under 4 clusters: July-November 2024 2 nd Senior Official Meeting in Gdansk (29 April) Ministerial EPA Meeting in Copenhagen on 22 July 2025 endorsing the EPA extension to smaller and inland ports, going upstream (Latin America), including new members (Norway, Switzerland) Next ministerial meeting in July 2026 (Ireland)
(Provisional) results	2,5 year of implementation (establishment of network of relevant stakeholders) Mapping of existing practises and solutions leading to a reduction of risks linked to drug trafficking , Awareness raising ('waterbed' effect), extending to smaller and inland ports
Planned/to do's/ questions to members	Risks: <ul style="list-style-type: none">• Push for developing a new EU legislation (administrative burden)• Overestimation of the port authorities' role (risk of imposition of new obligation leading to additional administrative burden and costs) => e.g. <i>in the context of the COM proposal on background checks for port workers</i>• Continued ESPO involvement in the EPA PPP initiative => sharing best practises, expertise, highlighting concerns but also possible solutions (bottom-up approach)

The Pact for the Mediterranean



In short	<ul style="list-style-type: none">▪ A new strategic EU framework presented on 16 October 2025▪ To establish cooperation and achieve deeper integration within the Mediterranean Region => <i>Common Mediterranean Space</i>▪ It includes a set of actions and initiatives grouped around three pillars: 1) people 2) economies, 3) security▪ Focus on demonstrating benefits of mutual cooperation and deeper integration within the Med Region <p>=> <i>No explicit reference to seaports nor to the risks of an unlevel playing field (competitiveness aspects)</i></p>
Timing	November 2025: the Pact to be endorsed by the EU and Med countries (30 th Anniversary of the Barcelona Process) 17 April 2026: Publication of the 1st Action Plan (21 actions to be implemented in 2026)/ a second edition of the Action Plan is expected in autumn 2026
Work done ESPO	<ul style="list-style-type: none">• ESPO Secretariat meetings with: COM Suica's Cabinet, Director North Africa in DG MENA• Follow-up discussions
Position ESPO	Support for the initiative, through making policymakers aware of risks with unfair competition
Next /Further steps	Further engagement with the COM (follow-up discussions in connection with the Action Plan 2026) and EP (AFET in the lead, Rapporteur Nicola Zingaretti (IT, PES) => draft EP report to be published yet



In short	<ul style="list-style-type: none"> • Commission’s “external” Initiative to create strategic and sustainable EU cooperation with third partner countries, support investment projects by blending of public and private funding • to mobilise up to €300 billion in investments (through a <i>Team Europe</i> approach: incl. involvement of EIB and other IFI’s i/European development instructions) • 6 sectors in scope (digital, climate, energy, transport, health, and education and research) • Among the 264 Global Gateway (GG) flagships the Global Gateway Green Shipping Corridors (GGGSC) flagship aimed at supporting third partner countries in their transition towards sustainable, renewable, and low-carbon fuels for international shipping (highly port-relevant)
Timing	<p>Ongoing long-term initiative (launched in December 2021), new EU funding to be secured under the 2028-2034 (Global Europe Regulation Proposal)</p>
Work done ESPO	<ul style="list-style-type: none"> • ESPO is a member of the GG Business Advisory Group (GG BAG) assisting the COM in the implementation • Active participation in the Commission's workshops on <i>GG Green Shipping Corridors</i> • Continuous dialogue with DG International Partnerships (COM DG INTPA in the lead)
Position ESPO	<p>Support for the initiative, promoting involvement of interested EU ports and raising policymakers’ awareness of risks of unfair competition from 3rd country ports</p>
Next /Further steps	<p>Further engagement with the COM (follow-up discussions in connection with the GG Green Shipping Corridors Flagship), policy monitoring</p> <ul style="list-style-type: none"> ➤ <u>New development</u>: the launch of the <u>Investment Hub</u> – a communication channel/ entry-point for the EU private sector to share investment proposals with COM DG INTPA ➤ <u>EU Ports Strategy angle</u>: Operationalisation of the <i>Funding Principles (Annex I)</i> to prioritise mutually beneficial initiatives in third-country ports

Priority: Global Gateway



Subject/issue	EU COM external” Initiative to create strategic and sustainable EU cooperation with third partner countries
What?	<p>To support investment projects in third partner countries (Africa, Latin America and the Caribbean, Asia and the Pacific, and Central Asia) by blending of public and private funding</p> <p>6 sectors in the scope (digital, climate, energy, transport, health, and education and research)</p> <p>To mobilise in 2021-2027 up to €300 billion in investments in (COM claims to have reached this goal)</p> <p>New funding targets to be set for the period 2028-2034</p>
Key players?	<p>Public entities European Commission (DG INTPA, DG NEAR, DG MOVE, DG CLIMA), Member States and GG Partner Countries, EIB Global, European Development institutions, private stakeholders</p>
Main content	<p>A set of actions and tools to support investment projects in partner countries through: 1) non-financial support (technical assistance, regulatory support, partner matching); 2) EU financial support (investment grants, guarantees, equity, debt and guarantee instruments of public (EIB/EBRD) and private financial institutions) => <i>Global Europe Instrument under the MFF 2028-2034</i></p> <p>Among the 264 Global Gateway (GG) flagships identified for the period 2022–2025, the Global Gateway Green Shipping Corridors (GGGSC)” flagship is of particular relevance to ports</p> <ul style="list-style-type: none">➤ to help partner countries in their transition towards sustainable, renewable, and low-carbon fuels for international shipping
Main ESPO priorities	<ul style="list-style-type: none">• To monitor policy developments, to highlight:<ul style="list-style-type: none">○ Council and EP discussions on the Global Europe Proposal under the 2028-2034 MFF• To secure mutual benefits for the EU (incl. EU businesses) and partner countries<ul style="list-style-type: none">➤ Implementation of the Funding Principles (Annex I) of the EU Ports Strategy, limiting the risk of an uneven playing field by avoiding EU funding for port projects in 3rd countries detrimental to the EU port sector

Work done/Current state of play	ESPO Secretariat participates in the meetings of the GG Business Advisory Group (GG BAG) Active participation in the COM workshops on GG Green Shipping Corridors (November 2024 and May 2025) Continuous dialogue with EU Commission (INTPA in the lead) The Breakout session at the 2025 ESPO Conference in Thessaloniki led by DG INTPA ➤ <i>Partnering up with ports outside the EU: How to make it a win-win</i>
(Provisional) results	Competitiveness: Inclusion of the Funding Principles (Annex I) in the EU Ports Strategy
Planned/to do's/ questions to members	<u>Policy monitoring</u> : Council and EP discussions on the Global Europe Proposal under the 2028-2034 MFF <u>Planned actions</u> : <ul style="list-style-type: none">• Continuous dialogue with the COM DG INTPA and the engagement in the implementation of the GG<ul style="list-style-type: none">➤ Ensuring the adequate implementation of the Funding Principles (Annex I) of the EU Ports Strategy, through sharing port intelligence, promoting a “competitiveness test” for port projects in third countries to be co-financed by the EU➤ Promoting port projects in third countries and encouraging interested EU ports to partner”• Members are invited to regularly report to the Secretariat on business opportunities and risks relating to 3rd country port projects to be supported under the Global Gateway Initiative

Information: Trade developments - new FTAs and EU-US relations



New momentum in EU trade policy (as part of broader COM efforts to reduce trade dependence on the US)

- ✓ Trade liberalisation with third countries through FTAs (*The elimination of a significant share of tariffs and non-tariff barriers, improved access to services markets — including international maritime transport and related services — public procurement markets, and access to critical raw materials are among the most obvious benefits of the FTA.*)
- **Conclusion of FTA negotiations**
 - **EU-Indonesia Free Trade Agreement** (13 July 2025)
 - **EU-India Free Trade Agreement** (27 January 2026)
 - **EU-Australia FTA** (26 March 2026)
- **FTA signature**
 - **EU Mercosur Agreement** (17 January 2026) => **provisional application as of 1 May 2026**
 - **EU-India FTA** (Q3/Q4 2026?) and **EU-Australia FTA** (Q3/Q4 2026?) => now legal scrutiny (*no further changes to the substance*)
- **EU–US trade relations** (state of play)
 - **The political July 2025 EU-US Agreement** (all-inclusive 15% US tariff on most EU goods and some tariff reductions on US exports to the EU) **remains in force**. However, implementation remains fragmented, delayed, and fragile (*with continued exposure to abrupt shifts in US politics*)

(*March 2026 US Supreme Court Ruling striking down key tariff measures imposed in 2025, with the Trump Administration quickly shifted to other legal tools (Sections 301, 232, etc.) to maintain tariffs*)
 - *EU-angle*: two pending EU legislative proposals on market access commitments (eliminating tariffs on many US industrial goods, opening quotas for agriculture/seafood) => **EP agreed its position in March 2026 and dialogues started**
 - **Trump -Threat to re-impose tariff of 25 % on cars**

Information: EU-UK relations



On 19 May 2025 the first EU-UK Summit took place, confirming the establishment of **new Strategic Partnership**
=> broader reset of EU-UK relations

Two key commitments (under the Common Understanding) to work towards:

- **linking Emission Trading Systems** (*incl. domestic and international maritime transport*)
- **establishing a Common Sanitary and Phytosanitary Area** (SPS Agreement)

ETS

- In November 2025 the Council approved the negotiating mandate for COM and **negotiations started in January 2026**
- Objective: **Create a larger, more liquid carbon market, incl. maritime**
 - Maritime ETS is not a central element of the negotiations and is not considered controversial (*a reminder: UK ETS (domestic+ports) in force from July 2026*)
 - CBAM dimension (UK not exempt) thus a strong pressure to reach the deal shortly
- **Conclusion of talks: mid-2026?** (before 2nd EU-UK summit in July?) with the implementation from 2027/mid-2027?

SPS Agreement

- The Council green-lighted negotiations in November 2025 (alongside ETS linking) with the **negotiations ongoing** (from January 2026)
- Objective: **UK alignment with the EU SPS legislation** (*food and feed safety, plant/animal health, labelling, organics*) **to remove most border checks and certificates** easing agri-food trade
- **Conclusion of talks => mid-2026?** (before 2nd EU-UK summit in July?) with the implementation from 2027/mid-2027?

Information: Russia's war against Ukraine - EU sanctions



The ongoing Russia-Ukraine war has led to the adoption of 20 packages of EU sanctions (*latest adopted on 23 April 2026*)

- **The most recently adopted sanctions** aimed at closing loopholes:
 - continuous expansion of the **port access ban and related services** to vessels forming the *shadow fleet* engaged in transporting Russian oil or petroleum product, circumventing the Oil Price Cap
 - => Additional 46 vessels listed bringing the total number of targeted vessels to 632
 - **a future ban on transporting Russian oil and petroleum products**, in coordination with the G7 and the price cap coalition (to be decided by the Council in the future, taking into account the Middle East crisis impact)
 - **a ban on LNG terminal services**, allowing EU operators to terminate any long-term contracts with Russian companies (from 1 January 2027)
- **In December 2025, the Council and EU Parliament reached a provisional agreement on the Regulation on phasing out imports of Russian natural gas => the Regulation entered into force on 3 February 2026 (EU Regulation [\(2026/261\)](#))**
 - It includes the full prohibition on both liquefied natural gas (LNG) and pipeline gas imports from Russia, with a full ban **applicable from 1 January 2027 and 30 September 2027 respectively**
 - As part of the agreement, COM committed to table, in early 2026, a similar proposal prohibiting all oil imports from Russia by no later than the end of 2027 (*to date, this proposal has not yet been presented*)

Information: Cybersecurity and new trusted ICT supply chains framework



- **The EU Ports Strategy highlights concerns over “high-risk suppliers” controlling key ICT systems, announcing**
 - work on “proportionate restrictions” on high-risk suppliers by providing a “trusted ICT supply chain security framework” (Cybersecurity Act II)
 - A “Union-level coordinated cyber security risk assessment on ports” (by 2027)
- **In January 2026 the COM proposed a revised Cybersecurity Act (CSA II) introducing a trusted ICT supply chains framework**
- **The goal: to reduce risks in the EU’s ICT supply chain from third-country suppliers** with cybersecurity concerns => **addressing non-technical risks** in sectors of high criticality (as defined in NIS2 Directive)
- This EU-wide horizontal, cross-sectoral framework with a central role for COM
 - **Assess ICT supply chain risks** in connection to third-country suppliers
 - **Identify high-risk suppliers**
 - As a result to **provide mandatory mitigation measures**
- Based on a Union-level security risk assessment, the COM to determine whether a third country poses “*serious and structural non-technical risks to ICT supply chains*”.
- As a result, entities established in such high-risk countries—or controlled by them or their nationals—will be barred from carrying out certain activities in the EU (*including holding EU cybersecurity certificates, participating in public procurement, or accessing EU funding programmes*)
- **The proposal at early stage of discussion in the Council** (Working Party on Cyber Issues) **and EP** (ITRE in the lead, Rapporteur Maria Guzenina, EPP(FI), a draft report to be published shortly) => **ESPO Secretariat to monitor further developments and report accordingly**

Legislation	Issues
EU Maritime Single Window Environment	<p>Process of development of IT tools (MIG, RIM, URAM) and relevant databases by the COM completed => national implementation officially kicked-off on 15 August 2025 (as set out in the EMSWe Regulation) => the implementation <u>at the national level</u> is delayed – with 11 MSs to implement the system by 2027 or later</p> <p>⇒ <i>EU Ports Strategy acknowledges that EMSWe to play key role in facilitating B2G reporting and customs processes</i></p> <p>⇒ <i>The EU Industrial Maritime Strategy notes that administrative procedures should become simpler once harmonised reporting via EMSWe is fully in place</i></p> <ul style="list-style-type: none">○ <i>Call on MS to work together on simplifying national and EU reporting requirements (e.g. today ships calling at a EU port must report over 1200 data elements)</i> <p>=> Maritime industry (including ports) to be consulted on simplifying administrative procedures and data requirements (from 2026 onwards)</p>
NIS II Directive and CER Directive	<p>Delayed implementation with more than half MS still not introducing both directives into their national laws => the so-called infringements procedures are ongoing</p> <p>Important milestone dates:</p> <ul style="list-style-type: none">○ NIS II: each MS to establish a comprehensive list of essential and important entities by 17 April 2025○ CER: each MS to identify the critical entities by 17 July 2026 => EU Ports Strategy encourages MS to include ports as critical entities. In addition: the <i>COM non-binding guidelines for critical entities on resilience measures are to be published shortly</i>



Harbour Masters and Safety Experts Committee

Priority Files

- Military Mobility and port resilience
- EU Action EU Action Plan on Drone and Counter Drone Security

Information

- Russia's war against Ukraine: EU sanctions*

Follow up/ Implementation

- EU Maritime Single Window Environment*
- NISII and CER implementation*

**Files shared with the Trade Facilitation, Digitalisation, Security and Geopolitics Committee*

Military Mobility and port resilience



In short

- In light of growing geopolitical tensions in Europe military mobility and resilience recognised as key strategic priorities for the EU
- In November 2025, the COM proposed a new legal framework addressing military mobility challenges across the EU and resilience of dual-use infrastructure

4 pillars:

- A **uniform framework** for cross-border military transport permissions
- Establishment of the **European Military Mobility Enhanced Response System (EMERS)** => *priority access to be given to the military with no compensation to affected transport users*
- **Protection and resilience** of Strategic dual-use infrastructure (SDI)
- Solidarity Pool (measures to share and pool transport and logistic capabilities)

Timing

Possible adoption: end 2026? Creation of the EU-wide military mobility “Schengen” by end-2027

Work done ESPO

- Contribution to the COM call for evidence and the ESPO [position paper](#) on the proposal
- Input to the Council and EP discussions (suggestions for amendments)
- Internal discussions (brainstorming, best practices), exchanges with other EU transport associations (CER)

Position ESPO

Support for: 1) simplified rules for cross-border military movements, 2) A new dedicated framework for crisis situations: EMERS, 3) Strategic Dual-Use Infrastructure (SDI) and protection measures, 4) a national coordinator in each MS. **Concerns include: (1) the risk of disproportionate impacts on island and peripheral Member States; and (2) EMERS and no compensation for losses incurred by affected transport users (EP introduced AMs allowing compensation for affected users, which appears to be a no-go for MSs)**

Next /Further steps

Strong involvement into a legislative process through a dialogue with COM, EP and MS (Mil Mob Regulation and MFF 2028-34 (CEF and EU Competitiveness Fund and their Military Mobility related financial envelops))

Military mobility and port resilience



Subject/issue	On 19 November 2025 the COM tabled the proposal for a EU Regulation on establishing a framework of measures to facilitate the transport of military equipment, goods and personnel across the Union (aka: <i>the Military Mobility (EU) Regulation</i>)
What?	Main purpose: simplifying and harmonising rules for cross-border military transport permissions (now highly fragmented), establishing an “emergency” framework for crisis situations, allowing for smooth military movements across the EU (EMERS), providing a high level of protection and resilience for relevant dual-use infrastructure (SDI), where relevant pooling MS recourses (transport and logistic capabilities) to strengthen EU military readiness
Main content	The Military Mobility (EU) Regulation proposal is built on <u>4 pillars</u> : <ul style="list-style-type: none">➤ A uniform framework for cross-border military transport permissions➤ European Military Mobility Enhanced Response System (EMERS)➤ Protection and resilience of Strategic dual-use infrastructure (SDI)➤ Solidarity Pool (measures to share and pool transport and logistic capabilities)
Main ESPO priorities	To ensure the role of ports as key enablers of military mobility across the EU is safeguarded and adequately reflected in the Regulation, with a focus on resilience and business continuity (including under EMERS - if the no-compensation rule is maintained, ensure that port authorities are not held liable instead) and to secure robust funding for dual-use port investments, with streamlined and dedicated procedures (public procurement).

Work done/Current state of play

EU Council: discussion being held in the Military Mobility Ad-Hoc Working Party, regular weekly meetings with the objective **to agreeing Council's position by June** => ambitious!

EU Parliament: draft Joint Report (TRAN (Rapporteur Roberts Zile (ECR), SEDE (Rapporteur Michal Szczerba (EPP) – draft published on 17 March 2026

Triologue: depending on the progress in the Council and EP most probably to start in autumn 2025

Final adoption: by end 2026 (as set out in the Military Mobility Action Plan)

Results

EP: Draft Joint Report

- **The rejection of the “no-compensation” rule**, more ambitious timeline for EMERS
- Discussions on consolidated AMs ongoing, with the aim to agreeing on the draft Report by June

Council

- Discussions are ongoing now focusing on 3 initial chapters (General provisions, Uniform framework for military mobility, resilience of transport infrastructure)

To do's/ questions to members

In light of developments in the EU Parliament (**rejection of the no-compensation rule**), **should we support this approach, or should we maintain a wait-and-see position**, given strong opposition from MSs, which argue that EMERS is an exceptional framework to be used only in duly justified, limited circumstances and with restricted geographical scope (one of AMs proposed by the Council).

Priority: EU Action Plan on Drone and Counter Drone Security



- On 11 February 2026 COM published **the EU Action plan on drone and counter-drone security**
 - **A set of actions designed to ensure a comprehensive, coordinated and targeted EU response to threats posed by malicious drones**
- The Action Plan to be implemented by the COM in cooperation with MS includes future actions, which may also be relevant in the port context:
 - Drone Security Package (to strengthen the identification and accountability of drone operations)
 - EU Trusted Drone Label
 - Improved definition of geographical zones
 - Feasibility study on options for establishing an EU level counter-drone framework
- The Action Plan now being discussed at the Council and EP (no Rapporteur yet)



Following the March Harbour Master and Safety Experts Committee meeting, to contribute to the discussions and highlight ports' perspective, the Secretariat developed a draft position paper.

The paper focuses on:

- 1) recognising the role of “wanted” drones in the port environment,
- 2) ensuring a systemic and coordinated approach to drone security,
- 3) improving information-sharing and stakeholder dialogue,
- 4) keeping pace with rapid technological developments,
- 5) addressing emerging threats, including surface and underwater drones,
- 6) recognising port diversity and ensuring adequate funding

Follow-up discussions with the COM and exchanges of best practices between ports to follow in the coming months.

Information: Russia's war against Ukraine: EU sanctions



The ongoing Russia-Ukraine war has led to the adoption of 20 packages of EU sanctions (*latest adopted on 23 April 2026*)

- **The most recently adopted sanctions** aimed at closing loopholes:
 - continuous expansion of the **port access ban and related services** to vessels forming the *shadow fleet* engaged in transporting Russian oil or petroleum product, circumventing the Oil Price Cap
 - => Additional 46 vessels listed bringing the total number of targeted vessels to 632
 - **a future ban on transporting Russian oil and petroleum products**, in coordination with the G7 and the price cap coalition (to be decided by the Council in the future, taking into account the Middle East crisis impact)
 - **a ban on LNG terminal services**, allowing EU operators to terminate any long-term contracts with Russian companies (from 1 January 2027)
- **On 3 December 2025, the Council and EU Parliament reached a provisional agreement on the Regulation on phasing out imports of Russian natural gas => entered into force on 3 February 2026 (EU Regulation (2026/261))**
 - It includes the full prohibition on both liquefied natural gas (LNG) and pipeline gas imports from Russia, with a full ban **applicable from 1 January 2027 and 30 September 2027 respectively**
 - As part of the trilogue, COM committed to table, in early 2026, a similar proposal prohibiting all oil imports from Russia by no later than the end of 2027 (*to date, this proposal has not yet been presented*)

legislation

issues

EU Maritime Single Window Environment

Process of development of IT tools (MIG, RIM, URAM) and relevant databases by the EU Commission mostly completed => national implementation officially kicked-off on 15 August 2025 (as set out in the EMSWe Regulation)

The EMSWe **implementation** at the national level is **delayed** – with 11 MSs to implement the system by **2027 or later**

COM is exploring options for the re-use of data within the EMSWe (as foreseen in the Regulation): the adoption of a relevant implementing regulation is needed

Members invited to signal problems with the implementation

NIS II Directive and CER Directive

MS to translate directives into national law by 17 October 2024

More than half of Member States did not meet the transposition deadline for both directives => End November 2024 COM launched the infringement procedures (first step)

Other important milestone dates for the implementation:

⇒ NIS II: each MS to establish a comprehensive **list of essential and important entities** by **17 April 2025** (though partially successful due to delays in the implementation)

⇒ CER: each **MS to identify the critical entities** by **17 July 2026** => main goal: to provide legal clarity on entities in the scope of Directives

Members invited to signal problems with the implementation



Energy & Blue Growth

Priority files

- EU Grids Package
- Industrial Accelerator Act

Other initiatives

- Circular Economy Act
- CO₂ transportation infrastructure and markets legislation
- Ocean Act
- Electrification Action plan
- Revision Energy Security Framework

Bottom-up

- Energy indicators ports

EU Grids Package



In short	<p>Published on 10 December 2025</p> <p>Legislative :</p> <ul style="list-style-type: none">• Revision of TEN-E Regulation C(2025/0399)• Permitting acceleration directive C(2025/0400) <p>Non-legislative :</p> <ul style="list-style-type: none">• Guidance on efficient and timely grid connections• Guidance on Contracts for difference <p>Main themes :</p> <ul style="list-style-type: none">• Step away from “first come first served” principle• Accelerating the expansion, modernisation and digitalisation of grids, incl. OPS (!)• Fast track permitting /Increase cross-border connections/Enhance energy system flexibility
Timing	<ul style="list-style-type: none">• Permitting acceleration directive : ITRE vote on 24 June 2026 (rapporteur Füglsang S&D)– plenary in July• TEN-E Regulation : ITRE vote on 10 September (rapporteur : Penkova S&D)– plenary in October• Aim at Trilogue agreement in Q3/ 2026
Work done ESPO	<ul style="list-style-type: none">• ESPO position paper on Grids package• Meeting ITRE rapporteur permitting acceleration directive + reaching out to shadows+ other MEPs• Amendments on TEN-E Regulation and Permitting acceleration directive (sent to EP) – April 2026
Position ESPO	<p>Grid connection guidance should be in directive/more attention to hydrogen/priority grid access for ports (esp. OPS)</p>
Next /Further steps	<p>Continue discussions with MEPs</p>

Industrial Accelerator Act



In short	<p>Proposal published on 4 March 2026</p> <p>Main content :</p> <ul style="list-style-type: none">• “Made in or with Europe” approach - public procurement/funding minimum content requirements• Restrictions on foreign direct investments in strategic sectors• Concept of industrial manufacturing acceleration areas with fast-track permitting, taking into account grid needs: MS to install enabling xconditions for these areas
Timing	<ul style="list-style-type: none">• 6 May deadline consultation EC• 6/7 May 2026 : discussion in ITRE 2026/0068(COD) – rapporteur : Christophe Grudler (Renew)• End of 2026 : final trilogue agreement
Work done ESPO	<ul style="list-style-type: none">• Developing position paper• Press release on CID (incl. Accelerator Act - permitting) – June 2025
Position ESPO	<ul style="list-style-type: none">• Requirements on EU/low-carbon content should not slow down or jeopardise investments• foreign investments: how will this work with the FDI screening regulation: complex – impact• Find ways to make these accelerator areas applicable to port areas (need to change texts): without obligation
Next /Further steps	<ul style="list-style-type: none">• Finalise position paper & respond to EC consultation• Draft amendments and submit to MEPs



1. On “made with Europe” content requirement for public procurement/funding

- Rules should be pragmatic to ensure ports can procure what they need at an acceptable cost and within a reasonable delay (avoid discussions/appeals)

2. On the “foreign investments contribution”.

- Rules should not undermine the attractiveness of investing in the EU and its ports.
- Consistency needed between recently approved Foreign Investment Screening Regulation (FISR) and IAA

3. On “Industrial Manufacturing Acceleration Area”

- Enabling conditions should be developed by Commission in cooperation with Member States (not only MS)
- Need to broaden scope to include all activities within port area
- Port (multimodal transport node) in/or nearby as a criterion
- Cfr. Free ports UK (bottom-up approach with application for status by consortium)
- Need for guaranteed grid connection within area
- Holistic view on nitrogen emissions

Circular Economy act (file postponed)



In short	<ul style="list-style-type: none">• Legislative act <p>Main content :</p> <ul style="list-style-type: none">• Enabling free movement of circular products, secondary raw materials and waste• Fostering a higher supply of high quality recyclates• Stimulating demand for secondary materials & circular products• Bringing down feedstock costs• Limiting export of critical raw materials waste & promote re-use and recycling• Creation of Trans-Regional Circularity Hubs
Timing	Q3 2026 - legislative proposal – trilogue agreement by Q3 2027
Work done ESPO	<ul style="list-style-type: none">• Position paper (submitted to EC Call for Evidence on 7 Nov 2026)• ESPO members to fill in survey VUB University
Position ESPO	Recommendations of ESPO to the call for evidence and consultation (November 2025)
Next /Further steps	<p>Continue dialogue with the Commission</p> <p>Field visit of EC to port of Rotterdam (Q3/4 2026)</p>

CO₂ transportation infrastructure and markets legislation (Industrial carbon Management Strategy)



In short	<ul style="list-style-type: none"> • Delivering long term certainty to project developers and increase investors confidence • Take away barriers for projects to develop (permitting, re-purposing of existing networks) and cross-border CO₂ transport • Create competitive CCUS markets (third party access & remove conflicts of interest) • Ports recognized as CO₂ hubs (incl. providing flexibility through temp. storage). • Need to ensure interoperability between ports <p>Main content :</p> <ul style="list-style-type: none"> • Regulatory framework on CCUS and CO₂ transportation • Market and cost structure, third-party access, • CO₂ quality standards
Timing	Q3 2026 – legislative proposal(s)
Work done ESPO	<ul style="list-style-type: none"> • Participation in Industrial Carbon Management Forum in Athens with focus on transport infrastructure for CO₂ (December 2025) • Joint event with Danish Shipping & Carbon Capture Europe • Joint ESPO – CCSA webinar (in presence of EC) – April 2026
Position ESPO	<ul style="list-style-type: none"> • Need to solve cross-border transport of CO₂ issue (ex EU) • Ports need fast-track permitting and funding to support CO₂ value chain

Next /Further steps Continue dialogue with the Commission



In short	<ul style="list-style-type: none">• Legislative <p>Main content :</p> <ul style="list-style-type: none">- Builds further on Maritime Spatial planning Directive- Improve the coherence and effective implementation of maritime governance in the EU- Ensure consistency across ocean related policy targets with the aim to protect and sustainably use ocean resources and services.- Structure the governance and coordination of the European Ocean Observation System- Simplify reporting obligations and reduce administrative burden in EU ocean policies
Timing	<ul style="list-style-type: none">• Draft Ocean Act by 2027
Work done ESPO	<ul style="list-style-type: none">• Position paper submitted to Call for Evidence (Feb 2026)• Participation to EC Consultation (May/June 2026)
Position ESPO	Space, importance of shipping lanes and alignment with EU Ports Strategy is a must
Next /Further steps	Continue dialogue with both the Commission and European Parliament

In short	<ul style="list-style-type: none">• Non - legislative <p>Main content : Aims to accelerate electricity's share of final energy consumption to 32% by 2030 :</p> <ul style="list-style-type: none">- Identify and remove barriers to electrification- Define priority policy actions at EU level- Promote cost-effective and system-friendly electrification
Timing	<ul style="list-style-type: none">• Planned for Q1 2026, but delayed/replaced by Accelerate EU (emergency measures following energy crisis)
Work done ESPO	<ul style="list-style-type: none">• Position paper submitted to Call for Evidence (Feb 2026)• Participation to EC Consultation (May/June 2026)
Position ESPO	Grid access is key for ports to electrify (incl. OPS)
Next /Further steps	Continue dialogue with European Commission

Revision of EU Energy security framework



Position of the European Sea Ports Organisation on the planned revision of the EU energy security framework.

(submission to the Call for Evidence launched on 15 September 2025)

Europe's Ports welcome the opportunity to provide input into this Call for Evidence and highlight the importance of ports in Europe's energy landscape.

Without energy, no ports - without ports, no energy

Ports and port complexes are important users of energy and are at the same time essential **partners in the provision of energy** to the benefit of Europe's economy and society. On average, around 40% of goods handled in Europe's ports are sources of energy. Ports can be importers (or exporters) of energy. They can be hosting production sites, storage, conversion of energies, or are facilitators in bringing the energy on land and/or can play a role in the supply chains for energy raw materials.

As such, Europe's ports are instrumental in **ensuring energy security** and stepping up **Europe's energy independence** and are a crucial partner in the **energy transition**¹.

But ports are also key as multimodal node in the supply chain and gateway to trade, linking Europe with the world. At the same time, many ports cluster **important industries** and/or are the transit towards these industry clusters in the direct hinterland. To play their role, they are also demanding sufficient and continuous energy.

In the light of the revision of the EU energy security framework it is important to recognise the role of ports in Europe's resilience and competitiveness and to **take the necessary measures to facilitate, reinforce this role and protect the ports in this role**. This to ensure that their operations can continue in times of crisis in whatever form these crises may come. Ports should therefore be recognised as being of **"Strategic European interest"**.

ESPO [position](#) submitted on 13 October 2025

- **No ports, no energy and no energy no ports**
- Funding needed to secure resilience of ports
- Priority Grid connection required to this effect
- More measures needed to protect ports from attacks (cyber, terrorist, crime, war,..)

Legislative text planned for **Q2 2026**

DG ENER, Directorate F, Unit F4: Energy Security and Safety

Finalisation trilogue : **Q2 2027**

Update on the internal process on energy indicators

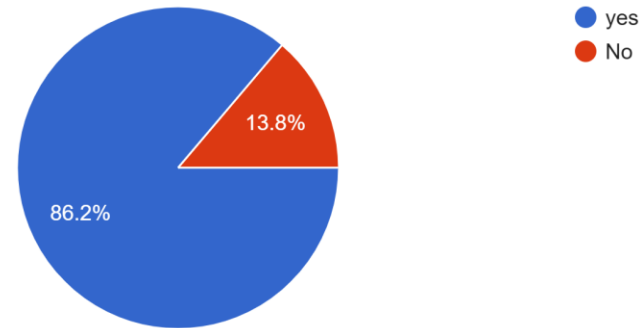


- [Survey](#) is out ! See [C-4877](#)
- Today 29 respondents

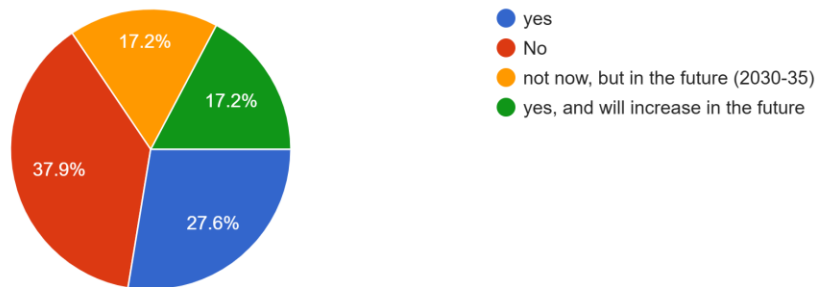
Please fill in the survey!



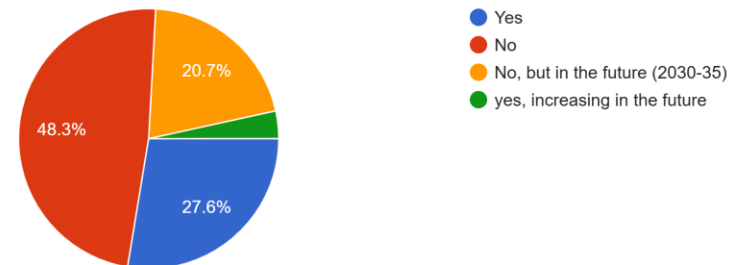
Is there any production of electricity happening within the port area ?
29 responses



Is there or will there be any import of energy carriers or CO2 in your port ?
29 responses



Is there or will there be any export of energy (carriers) from the hinterland or the port itself towards other ports
29 responses





Draft Communication on Temporary Iran Crisis Energy Framework – proposals relating to temporary state aid measures:

- Published on 29 April 2026
- Foresees *inter alia* the possibility for member states to take **specific measures to support intra-EU short-sea shipping sector**: compensation of max. 70% of the extra costs following the Middle East conflict
- Also compensation possible for **energy intensive sectors**
- Temporary amendments to the Clean Industrial Deal State Aid Framework (CISAF)

Policy initiatives following Iranian energy crisis



AccelerateEU - short term policy initiatives to be initiated by the EC (published on 22 April 2026)

Main topics :

- Strengthened **EU-level coordination** on oil and gas
- Creation of a **Fuel Observatory**
- Revision of the Oil Stocks Directive
- A State aid temporary framework allowing for **temporary emergency measures** to deal with price spikes
- **Electrification target** and publication of **Electrification Action Plan**
- Accelerating the shift to clean and local energy
- Lower the electricity-fossil fuels price ratio
- Review of the production **criteria** for **renewable hydrogen**
- Strict monitoring of the implementation of energy related EU legislation
- Legal proposal on **network charges and taxation** (May 2026)
- Update and modernise the **ETS** (proposal July 2026)

Economic Analysis and Statistics

- PortinSights
- Cooperation with Drewry
- Traffic developments in ports
- Macro-economic outlook
- Cooperation with Eurostat
- Modal split data sharing

ESPO data collection: analysis & outlook



Subject	
PortinSights: regular data collection	<ul style="list-style-type: none"> • About 90 regular participants for RES data. • Exchange on analysis of annual and quarterly data. • ESPO aims to motivate even more ports to join the PortinSights platform. • PortinSights system, particularly the data analysis tool, is currently undergoing an update: to make the system more secure + user friendly.
Traffic developments in ports	<ul style="list-style-type: none"> • Exchange on and analysis of recent traffic developments in EU ports. • Ports reflect upon the impact on port operations coming from the current geopolitical conflicts and geo-economic tensions, changing energy-related traffic, as well as any other relevant developments.
Macro-economic outlook	<ul style="list-style-type: none"> • Members not only discuss statistical analyses (as captured by PortinSights), but also regularly discuss macro-economic outlooks for the different ports and for the different regions in Europe. Factors as Europe's economic trends, ongoing inflation, ongoing global conflicts, trade developments (trade tariffs) and impact of the EU ETS for maritime are part of these discussions.
Cooperation with Drewry	<ul style="list-style-type: none"> • Ongoing cooperation with Drewry (Tim Power) of PortinSights data, to allow for a more detailed analysis. • Presentation of and exchange on Drewry analysis of PortinSights data during the EAS Committee meetings.
Cooperation with Eurostat	<ul style="list-style-type: none"> • The collaboration Eurostat and ESPO (PortinSights) regarding data sharing has been further advanced. • Regular exchanges with Eurostat Unit E.3 Transport, to discuss Eurostat's data on transport, including with non-EU Member States.
Sharing of modal split data	<ul style="list-style-type: none"> • ESPO collects and motivates members to share modal split data from ports. • The aim is to gather port modal split data annually, covering both total throughput and container traffic.



Labour and Operations Network

110

Social Dialogue

- Sectoral Social Dialogue for Ports (SSDC) meetings: currently suspended, after withdrawal of trade unions
- Upcoming European Ports Strategy
- Social impact of EU ETS Maritime/FuelEU Maritime
- EU Ports Security & Countering Drug Trafficking
- Eurofound Representativeness study

Labour and Operations Network: suspension of social dialogue



Subject	Work ESPO
Sectoral Social Dialogue Committee (SSDC) for ports	<ul style="list-style-type: none">• The work of the Sectoral Social Dialogue Committee (SSDC) for Ports meetings are currently suspended: this occurred after the withdrawal of the trade unions (the European Transport Federation (ETF), European Dockworks Council (EDC) and International Dockworkers Council (IDC)) from the SSDC for Ports.• ESPO wrote a formal letter to the Commission (find here) in reaction to the trade unions' withdrawal: reaffirming ESPO's commitment to social dialogue and underlining that ESPO remains available should there be a reconsideration of positions and a shared willingness to resume dialogue within the SSDC framework.• The last SSDC meeting that took place was on 5 February 2026. <p>➤ Please note: Members will be informed as soon as there is any new development regarding a potential resume of the SSDC meetings.</p>
European Ports Strategy	<ul style="list-style-type: none">• Labour and Operations Network members were consulted on their assessment of the European Ports Strategy (as published on 4 March), in particular regarding the Strategy's social chapter (see here).• Within the SSDC framework, social partners held regular exchanges with DG MOVE about the upcoming European Port Strategy. The social partners requested regular discussions with DG MOVE on this topic, to exchange views on the social context and impact as well as the competitiveness aspects of the new EU Ports Strategy.• For ESPO, the priorities for the social chapter of the Strategy include:<ul style="list-style-type: none">- to address the ongoing challenges regarding the lack of skilled employees;- focus on training and re-/upskilling, of both vessel crew and port personnel, particularly related to new technologies, decarbonisation and the energy transition;- to provide financing and support to vocational training for port workers and to training programmes for students

Labour and Operations Network



Subject	Work ESPO
EU ETS Maritime & FuelEU Maritime	<ul style="list-style-type: none">• In previous SSDC meetings, the social partners exchanged with DG CLIMA and DG MOVE about the social impact of EU ETS Maritime and FuelEU Maritime.• An update was given on the Commission's monitoring of investments in neighbouring non-EU ports and changes in the route of shipping lines & in the EU ports' traffic.• DG MOVE gave an update on the FuelEU Regulation, including on the Implementing Regulation identifying neighbouring container transshipment ports and their impact on the port sector.
EU Ports Security & Drug Trafficking	<ul style="list-style-type: none">• The social partners held discussions with DG HOME regarding the threats posed to port workers by organised crime groups involved in drug trafficking within the port area. This included regular updates on the actions of the European Ports Alliance Public-Private Partnership and discussions about measures to combat drug trafficking and protect port workers.
Representativeness Study	<ul style="list-style-type: none">• The representativeness study developed by Eurofound (on behalf of the EU Commission) was published by the end of 2025 (see here).• The study identifies the relevant national and supranational social partner organisations in the field of industrial relations in ports, ensuring they are adequately represented in the social dialogue.

Cruise and Ferry



Priority files

- Entry/Exit System

Information

- Upcoming EU Strategy on Sustainable Tourism

Entry/Exit System: finally operational



- In short**
- EES is an electronic registration system for third-country nationals entering the Schengen Area for short stays, replacing passport stamping with digital records.
 - The full entry into operation of the EES was postponed several times. In December 2024, the EU Commission presented a legislative proposal allowing for a progressive start of the EES within a six-month period, with flexibility granted to Member States.
 - The (EU) Regulation allowing for the progressive start of the EES adopted on 18 July 2025
 - **The EES officially entered into operation on 12 October 2025**
 - **The EES become fully operational from 10 April 2026**

Timing Progressive start from 12 October 2025 – full deployment from 10 April 2026

- Work done ESPO**
- Close cooperation with the COM/eu-LISA/Frontex as well as like-minded EU transport associations highlighting the port-related aspects of the EES implementation
 - Contact facilitation between ports and COM on issues encountered during the EES progressive start
 - Monitoring of the file via ESPO's participation in the Carriers' Working Group, participation in the DG HOME meetings with passenger transport industry on EES
 - Regular topic of discussions at the Cruise and Ferry Ports Network

Next /Further steps **Members are still invited to report on the issues linked to the EES deployment encountered at in ESPO seaports, particularly in view of the upcoming high season**

Priority: Entry/Exit System - implementation



- **The Entry/Exit System officially began its operations on 12 October 2025**
 - Member States gained the possibility to deploy the system progressively (within 6 months) or start fully from day 1
 - **Progressive start:** gradual digital registration of Third Country Nationals (TCNs) records at BCPs, starting with at least 10% of registered border crossings (30 days), followed by 35% (90 days), 50% (150 days)
 - **Full deployment from 10 April 2026**
 - Foreseen flexibilities after 10 April:
 - **during 90 days after the EES full deployment it may be partially suspended in exceptional circumstances** leading to the excessive waiting time - no collection of biometric data **for a maximum of 6 hours** => the possibility to be triggered at a specific border crossing point **until 9 July 2026**
 - **Automatic extension by 60 days** (if less than 80 % of the individuals were registered with biometrics during the progressive start period contain biometric data (Article 7.4) => 10 days after the end of progressive start eu-LISA to provide statistics on MS to COM => by **7 September 2026**
- Following the March 2026 coordination meeting, the **Secretariat prepared and shared with the Commission an overview of the EES deployment in ESPO ports**, outlining the state of play and requesting further guidance on how these flexibilities should be implemented in practice
- The **Secretariat invites members to report on issues related to the EES deployment** in ESPO ports, particularly in view of the upcoming high season => the topic to be discussed at the next Cruise and Ferry Network meeting.

Information: the upcoming EU Sustainable Tourism Strategy



- **In December 2024**, Transport and Tourism Commissioner Tzitzikostas announced the intention to develop a **new comprehensive EU strategy on sustainable tourism** (confirmed in the COM Work Programme 2026)
- The strategy will address tourism-related aspects such as :
 - Climate change and environmental impact
 - Unbalanced tourism and its effects on local communities
 - Labour shortages and workforce training
 - SME adoption of digital tools, including AI
 - Strengthening Europe’s brand as a *sustainable* destination
- **In September 2025, ESPO contributed to the call for evidence** launched by the EU Commission, sharing the perspective of European cruise and ferry ports.
 - **ESPO main message:** the strategy to accurately reflect **the role of cruise and ferry ports in the tourism ecosystem, focusing on environmental and social sustainability, competitiveness, financing, and resilience aspects**
- **The publication** of the strategy is currently expected **after summer 2026** (delayed because of Middle-East crisis)
 - ✓ The Secretariat intends to invite the Commission to present its strategy to members at the next meeting of the Cruise and Ferry Port Network



ESPO KNOWLEDGE NETWORK

EcoPorts

PortinSights

ESPO Award 2026

**ESPO Conference 2026 and
2027**



EcoPorts network - 82 ports in the network + 30 PERS certified ports –

Four countries are particularly active in this network: Spain, United Kingdom, Germany, and the Netherlands.

- The review of the SDM questions: workshop to finalise in June.
- **Incorporate new SDM data in the environmental report in 2027**
- Review of PERS (align with new ISO14001 standard)
- **Plan workshops/ online sessions with ECOPORTS network**
- **Mark/Celebrate 30 years of ECOPORTS in 2027**



PortinSights

About 90 regular participants for RES data.

Exchange on analysis of annual and quarterly data.

ESPO aims to motivate even more ports to join the PortinSights platform.

PortinSights system, particularly the data analysis tool, is currently undergoing an update: to make the system more secure + user friendly.



ESPO Conference 2026: 7 and 8 May

hosted by the Port of Gdansk

We are fully booked!





THE ESPO AWARD 2026

WILL REWARD THE PORT THAT SUCCEEDS BEST IN DEVELOPING PORT INFRASTRUCTURE AND SPATIAL PLANNING PROJECTS SERVING BOTH THE PORT AND THE CITY

DEADLINE 3 JULY 2026

ESPO AWARD CEREMONY AND DINNER: 10 NOVEMBER 2026

VENUE: VAN HAERENTS ART COLLECTION



COMMUNICATION & STUDIES

- Environmental Report
- Annual Report 2024-2025
- [LinkedIn](#)



ANNUAL REPORT 2024-2025

European Sea Ports Organisation

Port of Thessaloniki



More than 8000 followers on ESPO's LinkedIn account



- Number of followers

Follower highlights

8,154
Total followers

299
New followers in the last 90 days
▼13.8%

- Visits to the account

Visitor highlights

893
Page views
▲15.5%

417
Unique visitors
▲7.2%

2
Custom button clicks

Learn more about who is interested in your Page
Review recent visitors and explore key insights.

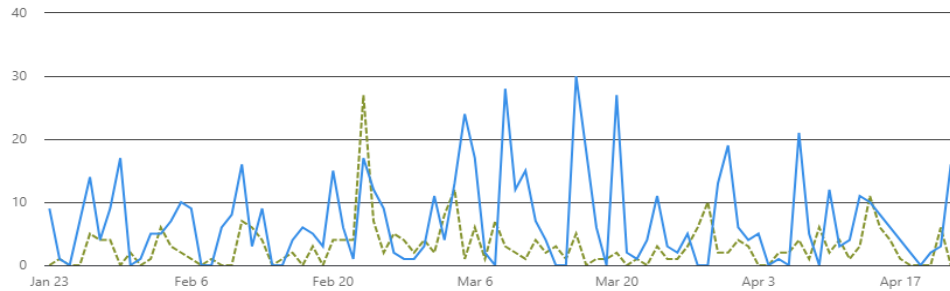
Show visitors

Follower highlights

8,154
Total followers

Visitor metrics

Page views All pages All filters



✓ Desktop 626
✓ Mobile 267

- Audience reactions to the content shared

Highlights

Data for 1/23/2026 - 4/22/2026

299
New followers in the last 90 days
▼13.8%

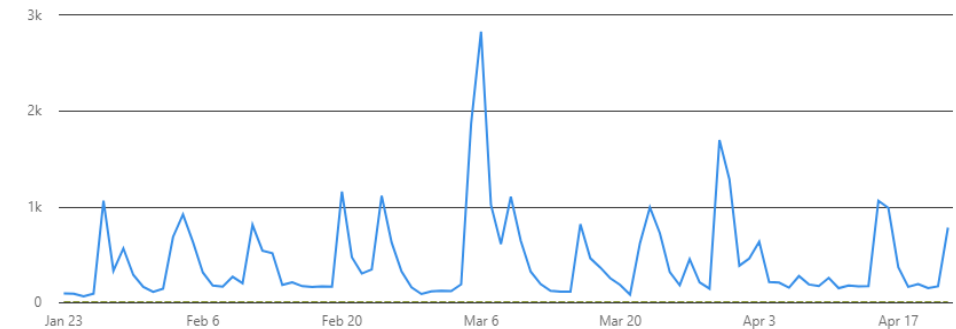
1,044
Reactions
▲15.1%

20
Comments
▼39.4%

17
Reposts
▼5.6%

Metrics

Impressions



✓ Organic 39,479

ESPO INTERNAL

- Meetings
- Position papers
- Priorities
- Team

If one does not know to which port one is sailing,
no wind is favourable.

Proposal for a working group in ESPO for outermost regions ports



The outermost regions are gathered in a specific association and each of the regions have also a representation in BX. There are working groups on different relevant themes.

For ports there is the possibility to:

- Either have a separate working group
- Having a working group under the umbrella of ESPO

The idea is that the positions from these working groups are then passed through the regional associations and presidents of these regions who use these when talking to the Commission, etc.

Advantage if under ESPO umbrella: all relevant ports are ESPO members, guarantees alignment in positions and strategies.

Gives ESPO an extra voice towards Commission and EP.

Occasional Morning coffees with ESPO...

- Thursdays from 9.15 to 10.00 : virtual meeting (Webex) - only if there is news to share
- Open to all members (but only members)
- 91 sessions since start
- Lately more difficult because of busy agenda's





PORT BUSINESS NETWORK

ESPO Network that aims at exchanging port strategies and vision

ESPO secretariat as facilitator

Informal character (no minutes)

Last edition December 2025

Ideas for next editions:

- **Energy sharing in the ports: challenges and opportunities**
- **Investment capacity of Europe's ports**
- **Drones**

ESPO is taking position!
24 positions submitted over the last year: 9 positions since last GA



ESPO Contribution to the European Commission's Call for Evidence on the Review of the Alternative Fuels Infrastructure Regulation (AFIR) (Regulation (EU) 2023/1804)

27 April 2026

Position of the ESPO on the European Grids package

17 March 2026

Position of ESPO on the proposal for Regulation on establishing the European Competitiveness Fund (2025/0555)

16 March 2026

Position on the European Sea Ports Organisation on the EU Military Mobility Regulation Proposal

13 March 2026

ESPO letter on the future of SSDC

10 March 2026

Submission to the Call for Evidence published on the ocean act

09 February 2026

Position of the European Sea Ports Organisation (ESPO) on the Communication on Better Regulation

02 February 2026

Position of the European Sea Ports Organisation on the Revision of the EU Public Procurement framework - Participation in the Call for Evidence

26 January 2026

Position of the European Sea Ports Organisation on the EU Electrification Action Plan

20 November 2025

The position of the European Sea Ports Organisation on Circular Economy

07 November 2025

ESPO priorities for the next 6 months



EU Ports Strategy

Connecting Europe Facility (CEF III) + MFF

Military mobility package + defence budgets

EU Grids package

Review Fit for 55: ETS, AFIR (OPS), Fuel EU – alignment IMO??

Industrial Accelerator Act

EU Action Plan on Drone and Counter Drone Security?

The Team



Isabelle Ryckbost
Secretary General



Danique de Jonge
Senior Advisor Intermodal,
Logistics, Port Governance
and Management, Economic
and Statistics Committee,
Social Dialogue



Tim Verhoeven
Senior Policy Advisor
Sustainable Development,
EcoPorts Coordinator



Philippe Putman
Senior Policy Advisor
Energy, Industry and
Decarbonisation



Piotr Krasnicki
Senior Policy Advisor Trade
Facilitation, Customs and
Security, Marine Affairs,
Cruise and Ferry Network



Turi Fiorito
Director EFIP



Cécile Overlau
Finance and Office Manager



Chiara Mantovano
Personal Assistant, Events and
Communication Manager



Ana Maria Voicu
Communication,
Administrative and Event
Assistant
(1/2 FTE)



Bélen Landaluce
Junior Advisor

Thank you for your support and cooperation

See you on 10 November in Brussels!

The ESPO team

