

EU INDUSTRIAL MARITIME STRATEGY AND EU PORTS STRATEGY: OPPORTUNITIES AND REGULATORY EXPOSURE FOR MARITIME AND INFRASTRUCTURE INVESTORS

Date: 11 March 2026

EU Energy, Infrastructure, and Resources Alert

By: Agnese Schinelli, Hilary Soileau, Giovanni Campi

On 4 March 2026, the European Commission adopted two complementary policy initiatives: the [EU Industrial Maritime Strategy](#) and the [EU Ports Strategy](#). Together, the initiatives set out the EU's policy roadmap for strengthening the competitiveness, sustainability and resilience of Europe's maritime ecosystem, covering shipbuilding, shipping, port infrastructure, and maritime technologies.

The strategies combine industrial policy, climate regulation, trade policy and infrastructure investment, reflecting the EU's increasing focus on strategic autonomy, energy security and supply chain resilience. For companies active in maritime transport, port infrastructure, energy and logistics, the initiatives signal both *significant business opportunities*—particularly in green maritime technologies and port modernization—and increasing regulatory scrutiny, notably in relation to climate obligations and foreign investment in strategic infrastructure.

STRATEGIC CONTEXT: MARITIME INFRASTRUCTURE AS A GEOPOLITICAL ASSET

The EU increasingly frames *maritime industries as strategic infrastructure* critical to trade, energy security and defense mobility. Maritime transport accounts for approximately 75% of EU external trade and around 30% of intra-EU freight, while ports handle roughly 74% of goods entering or leaving the EU.

Against a backdrop of geopolitical tensions, supply chain disruptions and intensifying global industrial competition, the Commission aims to: i) strengthen Europe's leadership in high-technology maritime manufacturing; ii) accelerate fleet modernization and decarbonization; iii) modernize and secure EU port infrastructure; and iv) reduce strategic dependencies on third countries.

INDUSTRIAL MARITIME STRATEGY: REINFORCING EUROPE'S MARITIME MANUFACTURING BASE

The Industrial Maritime Strategy focuses on strengthening the European maritime industrial ecosystem, including shipyards, maritime equipment manufacturers and offshore energy supply chains. A key element of the strategy is the establishment of an EU Industrial Maritime Value Chains Alliance, intended to coordinate investment and

support European leadership in key maritime technologies. Priority segments include: i) high-technology vessels (e.g., cruise ships, research vessels, icebreakers); ii) offshore wind installation and support vessels; iii) underwater technologies and maritime robotics; and iv) advanced port equipment and digital maritime technologies.

The Commission acknowledges that, while European shipyards remain competitive in high-value specialized vessels, they face increasing competition from heavily subsidized shipbuilding industries in Asia. Industrial policy measures therefore aim to reinforce EU leadership in high-technology segments with strong innovation potential.

The strategy also envisages measures to stimulate demand through public procurement pipelines for strategic vessels, targeted procurement criteria supporting EU industrial resilience and increased use of EU funding instruments.

EU PORTS STRATEGY: PORTS AS LOGISTICS AND ENERGY HUBS

The EU Ports Strategy aims to modernize Europe's ports and position them as key nodes in the energy transition and logistics system. The strategy prioritizes: i) port electrification and onshore power supply; ii) deployment of alternative fuel infrastructure; iii) improved hinterland connections through rail and inland waterways; and iv) digitalization of port operations and logistics chains.

EU ports are expected to evolve into multi-fuel energy hubs, supporting hydrogen imports, renewable fuels and offshore renewable energy supply chains.

The strategy also places greater emphasis on security, cybersecurity and protection of critical infrastructure, reflecting concerns over organized crime, cyber threats and geopolitical risks affecting maritime assets.

OPPORTUNITIES FOR INDUSTRY OPERATORS

The strategies signal a strong policy push toward commercializing maritime decarbonization and infrastructure modernization, creating several potential areas of opportunity for industry participants.

INVESTMENT INCENTIVES AND FUNDING OPPORTUNITIES

The EU intends to mobilize a range of funding instruments to support the maritime transition, including the Connecting Europe Facility, Innovation Fund, Horizon Europe and other future competitiveness funding programmes. Such programmes are expected to support projects such as port electrification and shore-side electricity infrastructure, vessel decarbonization and fleet modernization, as well as digital maritime technologies and shipyard modernization and clean vessel development.

For investors and technology providers, this may create new incentives to invest in maritime infrastructure and low-carbon maritime technologies.

ALTERNATIVE FUELS AND POWER-TO-X PROJECTS

Energy security considerations, reinforced by geopolitical developments, are likely to accelerate EU efforts to diversify energy sources and develop alternative fuels for maritime transport. This could create renewed

opportunities for power-to-X projects and alternative maritime fuels, including hydrogen, ammonia, methanol and synthetic fuels.

Ports are expected to play a central role in these developments as energy import and distribution hubs, generating demand for infrastructure related to fuel production, storage, bunkering and logistics.

COMMERCIALIZATION OF EU MARITIME POLICY INITIATIVES

The strategies reflect a broader shift toward translating EU policy objectives into concrete industrial and infrastructure projects. As Member States implement these initiatives at national level, companies may find opportunities to propose commercial solutions and infrastructure projects directly to national governments, port authorities and public entities responsible for maritime infrastructure.

EMERGING TECHNOLOGIES

The EU's focus on innovation in zero-emission maritime transport may also create space for emerging technologies, including advanced energy systems and next-generation propulsion solutions. Although still at an early stage of policy discussion, the maritime sector may increasingly explore advanced nuclear technologies, including potential applications of small modular reactors (SMRs) for maritime or port-related energy infrastructure.

REGULATORY EXPOSURE FOR NON-EU BUSINESSES

While the strategies create significant commercial opportunities, they also signal an increasingly interventionist regulatory environment affecting both EU and non-EU companies operating in the maritime sector.

EXPANDING CLIMATE OBLIGATIONS FOR SHIPPING OPERATORS

The EU continues to strengthen its maritime decarbonization framework through measures such as EU ETS Maritime and FuelEU Maritime, which impose emissions-related obligations on vessels calling at EU ports. Significantly, such measures apply regardless of the nationality of the shipping operator, meaning that non-EU companies are directly affected when operating within EU maritime transport networks. Operators may therefore face increasing compliance costs and may need to accelerate fleet modernization and fuel transition strategies.

FOREIGN INVESTMENT SCREENING IN PORT INFRASTRUCTURE

The strategies also highlight the EU's growing focus on economic security and protection of strategic infrastructure. The Commission intends to provide guidance to Member States on screening foreign investments in ports and other strategic maritime infrastructure, including monitoring foreign ownership and operational control of port assets. Non-EU investors may therefore face enhanced scrutiny and potentially longer approval timelines when acquiring or investing in port infrastructure within the EU.

LEGACY CLIMATE EXPOSURE IN VESSEL ACQUISITIONS

Companies acquiring vessels may also face potential regulatory exposure linked to the vessel's operational history in EU waters. In certain circumstances, climate compliance obligations may be associated with vessels that have previously called at EU ports, even if the purchaser does not intend to operate the vessel within the EU in the future.

This may require enhanced regulatory due diligence and contractual risk allocation mechanisms when acquiring vessels with an EU operational history.

OUTLOOK

Through the Industrial Maritime Strategy and the EU Ports Strategy, the EU is seeking to position the maritime sector as a strategic industrial ecosystem combining decarbonization policies, industrial policy tools and infrastructure investment.

For maritime, energy and infrastructure companies, the initiatives create significant opportunities in green shipping technologies, port modernization and alternative fuels infrastructure, while also signaling greater regulatory oversight of strategic maritime assets and stronger industrial policy support for European supply chains.

KEY CONTACTS



AGNESE SCHINELLI
COUNSEL

MILAN
+39.02.3030.2954
AGNESE.SCHINELLI@KLGATES.COM



HILARY SOILEAU
ASSOCIATE

HOUSTON
+1.713.815.7362
HILARY.SOILEAU@KLGATES.COM



GIOVANNI CAMPI
SENIOR POLICY DIRECTOR

BRUSSELS
+32.2.336.1910
GIOVANNI.CAMPI@KLGATES.COM

This publication/newsletter is for informational purposes and does not contain or convey legal advice. The information herein should not be used or relied upon in regard to any particular facts or circumstances without first consulting a lawyer. Any views expressed herein are those of the author(s) and not necessarily those of the law firm's clients.