



Council of the European Union
General Secretariat

Brussels, 13 March 2026

WK 4004/2026 INIT

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MEETING DOCUMENT

From:	General Secretariat of the Council
To:	Working Party on Shipping
N° prev. doc.:	ST 6987/26
Subject:	EU Industrial Maritime Strategy - Presentation by the Commission

Delegations will find attached the presentation made by the Commission at the Shipping Working Party meeting on 13 March 2026 regarding the above subject.

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EU Industrial Maritime Strategy

Shipping Working Party – 13.03.2026

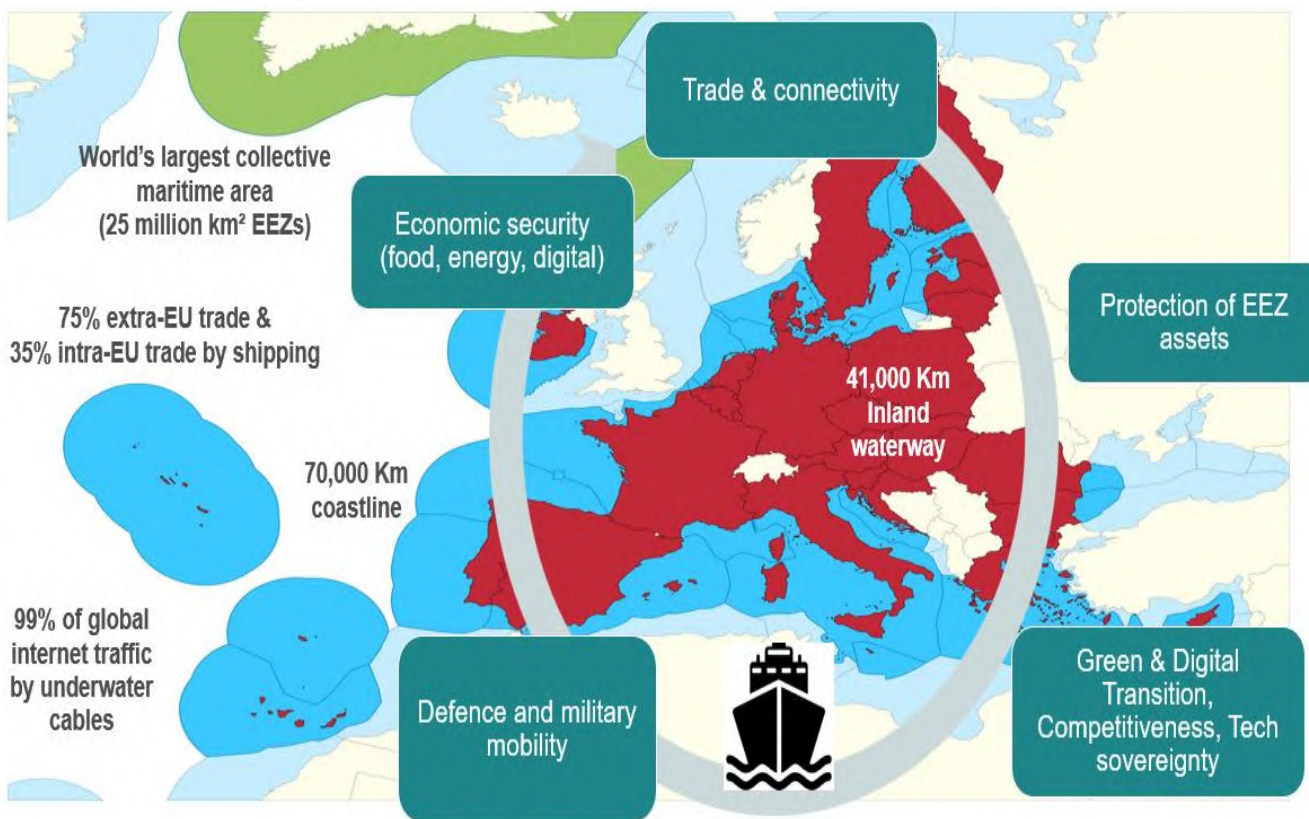
EU Industrial Maritime & Ports Strategies



Two strategies – one common goal:

A competitive, resilient and sustainable European waterborne ecosystem including ports, maritime manufacturing, servicing and shipping industries.

Europe as a waterborne continent: Maritime Manufacturing & Shipping strategic assets



EU shipbuilding

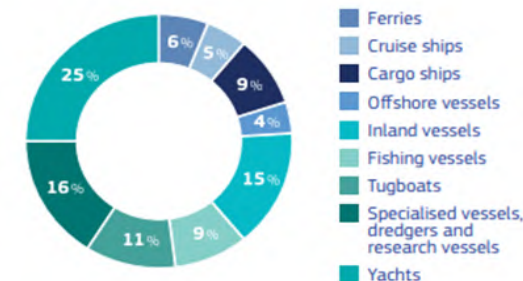
The EU leads globally in **high-end shipbuilding** and **maritime equipment**:

97%
of cruise ships

67%
of icebreakers

*Percentages are EU global market shares

EU commercial ship production*



*Average number of units delivered per year between 2021-2025, e.g. out of all ships delivered 6% were ferries.

EU shipping

76%
of all EU imports are delivered by ship

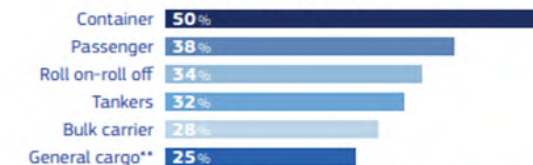
The value of these imports is close to

€ **1.3** trillion

EU-owned shipping fleet – the world's largest

34%

EU share by ship type*



*Percentage in gross tonnage from EU-owned shipping fleet vs world fleet
** Non-specialised ship designed to carry a wide range of goods

Extensive stakeholder consultation process

Mobility Transition Pathway: bottom-up analysis of EU maritime manufacturing value chain

Strategic dialogue hosted by Commissioner Tzitzikostas with EVP Séjourné participation

Call for Evidence

Szczecin Declaration and additional input from EU member states

Workshops and conferences (e.g. Waterborne Days 2025, European Shipping Week)

Field visits by Csr Tzitzikostas and DG GROW/DG MOVE services

EU expert groups (European Sustainable Shipping Forum, European Port Forum)

EU Industrial Maritime Strategy (EIMS)

**Build, Equip, &
Repair**

**Transport &
Connect**

Secure & Protect



**Access to
Innovation**

**Access to
Finance &
Investment**

**Access to
Skills & Quality
Jobs**

Objectives

- **Bolster the competitive position of EU's waterborne cluster:**
 - ✓ **Strengthening Europe's maritime industrial and technological base** as frontrunner in clean and digital solutions.
 - ✓ **Preserving EU's global leadership in shipping** while pursuing a competitive, sustainable and quality maritime transport vision.
 - ✓ **Bolstering naval and dual use capabilities**, to ensure EU's strategic autonomy and wider security interests, including defense, military mobility and protection of critical infrastructure.
- **Improve resilience of the cluster and contribute to enhanced EU's security.**

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Pillar I – Build, Equip & Repair

Key elements:

- Growth and competitiveness in lead markets
- Modernising the EU maritime production base
- Strategic use of public procurement & funding
- Ensure fair competition with third countries
- Strengthen global ship recycling framework & advance maritime circularity

Flagship Actions

Launch an **EU Industrial Maritime Value Chains Alliance** to foster industrial sovereignty and tech leadership in lead markets

Support European shipyards' digital, clean and circular transformation ("**Shipyards of the Future**")

Leverage **public procurement and EU funding** as proposed in the MFF, in support of **EU industrial leadership**, including through **public orders' pipelines** and targeted **non-price and economic security criteria**

Actions to ensure **fair competition internationally for EU shipyards and equipment manufacturers**, including export credits for ships and where necessary and feasible sector-specific trade measures

Recommendations to Member States:

- Contribute to achieving the **EU 2030 maritime industrial vision** set out in the strategy
- Prioritise funding support for projects **supporting economic security and reducing foreign dependencies**, building on the Joint Communication on EU economic security

Pillar II –Transport & Connect

Key elements:

- Ownership and flags
- Energy transition and decarbonisation
- Safety - a pillar of high-quality shipping and resilience
- Simplifying administrative formalities to leverage Europe's waterborne single market potential
- Pursuing EU interests at international level
- Support for the inland navigation, cruise & boating sectors

Flagship Actions

Pursue work within the **IMO** towards **global solutions** and **revise relevant EU legislation** taking into consideration global measures at IMO in order to avoid double payment

Consider how to **simplify** the monitoring, reporting and verification framework for **EU ETS and FuelEU Maritime** and **streamline administrative formalities** for shipping operations

Pursue **global ambition**, including through reinforced engagement at IMO work, foster **strategic partnerships** with third countries and ensure **smooth** functioning of **global maritime markets**

Recommendations to Member States:

- Further advance pragmatic measures to enhance the **attractiveness of EU Member States' flags**
- Complete the implementation of the **EMSWe Regulation**
- Work jointly with the Commission towards **simplifying and streamlining** national and EU reporting requirements
- Step up collaboration and allocate sufficient resources to **bolster the EU's strategic presence** in the areas of international maritime chokepoints

Pillar III – Secure & Protect

Key elements:

- Enhancing Europe's naval industrial and technological base
- Securing technological leadership in maritime domain awareness
- Supporting military mobility and emergency preparedness



Flagship Actions

Support the **ramp-up of naval industrial production capacities**, including through the **new European Defence Industry Programme (EDIP)** and **ReArm Europe Plan**

Propose to pursue a **Dual Use Ferry Construction support** programme

Recommendations to Member States:

- Use the different opportunities under **ReArm Europe Plan**, which aims to mobilise up to **EUR 800 billion in defence spending** by 2030, to **strengthen naval capabilities**
- Make use of the opportunities offered by **EDIP**, in particular the possibility of establishing **European Defence Projects of Common Interest**, including in the area of maritime domain awareness.

Pillar IV – Access to Innovation

Key elements

- Enhance the policy framework to foster EU leadership in innovative technologies
- Promoting synergies, coordination and addressing obstacles to the industrial scaling up of innovation



Flagship Actions

Update the regulatory framework to foster **EU leadership** in innovative technologies including **wind propulsion, nuclear propulsion** and **autonomous ships**

Strengthen and expand the scope of R&I support for waterborne sector, building on the achievements of the current co-programmed Zero-Emission Waterborne Transport Partnership

Launch the **Ocean Observation Initiative** (OceanEye)

Recommendations to Member States:

- Further support the **rapid uptake of innovation** including tests beds and regulatory experimentation

Pillar V – Access to Finance & Investment

Significant financing needs across the investment cycle, e.g. :

- Decarbonization, including fleet renewal and retrofiting
- Digitalisation, incl advanced manufact.
- Research and Innovation
- Up/re skilling
- Infrastructure upgrades

A mix of **EU, national and private funding and financing**, supported by predictable **regulatory** frameworks and **de-risking** tools, will be essential.

Dedicated advisory, matchmaking & project pipeline tools, e.g.:

- EU Ship Financing Portal
- BlueInvest
- Europe Enterprise Network (EEN)
- EIB / InvestEU Advisory Hub
- Innovation Fund Project Development Assistance (IF PDA)

EU support for investments, e.g.

- Since 2014, **CEF** provided support for different types vessel projects (EUR 220 million). A dedicated call in 2026.
- Through **InvestEU**, EUR 1-1.5 billion investment to be mobilized in the waterborne sector by 2027.
- **Blue Economy product** (InvestEU and EMFAF) aims to mobilise EUR 800 million in investment.
- Through the **Innovation Fund**, approx. EUR 1.5 billion to be committed until 2030. A dedicated call in 2027.
- Under **Horizon Europe**, EUR 345 million allocated in the period 2021 – 2024 + EUR 184.5 million to be allocated to finance R&I actions until 2027
- Under **EU defence programs** EUR 1.1 billion committed at EU level to boost naval capabilities since 2019

Next MFF (2028-2034):

- **European Competitiveness Fund (ECF)** potential role in helping get EU innovation to market and supporting eligible investments in clean & digital ships, modernisation / innovation in shipbuilding, *blue tech*, defence & dual use assets.

Flagship Actions

- Support the **renewal and decarbonisation of the shipping fleet** under the current **Connecting Europe Facility** while fostering domestic **industrial capacity**
- Consider under the forthcoming ETS review an **EU mechanism to support the uptake of sustainable fuels and clean propulsion technologies**
- **Revise the EU taxonomy criteria** to improve access to sustainable finance and incentivise sustainable investments

Recommendations to Member States:

- Allocate a part of ETS revenues to maritime decarbonisation investments in Europe;
- Leverage the new Clean Industrial Deal State Aid Framework (CISAF) to support eligible investments



Pillar VI – Access to skills & quality jobs

Key elements

- Up- and re-skilling the EU shipbuilding workforce and seafarers
- Mobility, attractiveness and quality jobs



Flagship Actions

Create a **network of maritime higher education institutions and vocational training centers** across the EU providing education and training for maritime cluster jobs including re- and up-skilling programmes.

Encourage and support Member States in **increasing participation of maritime higher education in Erasmus+ and associated initiatives** by facilitating procedures and removing barriers to learning mobility.

Process & Next Steps

Delivering the Strategy together



Cooperation between all parties

Successful implementation will be based on cooperation with:

- Member States and regional authorities
- Industry and social partners
- Civil society and all interested stakeholders.



Establish a **high-level Maritime Industries and Ports Board**

chaired by the responsible Commissioner and EVPs to have a continued exchange on the implementation of the actions outlined in the EU industrial Maritime & Ports strategy.

