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Study on EU Maritime Transport Capacity

How can maritime transport improve EU's defence readiness? This study assesses EU maritime transport capacity and its potential for European military mobility under dual-use conditions. It reviews the infrastructure, market and regulatory conditions to identify practical steps for a more coordinated and operationally ready transport system.

Context

Maritime transport is vital for military mobility, providing the scale, reach and flexibility needed to move heavy military equipment, fuel and supplies to and across Europe. Commercial vessels and ports are best placed to connect islands and peripheral regions. As both military movements and commercial operations rely on the same infrastructure and capacity, close civil-military coordination is crucial.

Purpose

The study examines how EU maritime system can support military mobility under dual-use conditions. It reviews ports, vessels, shipping networks, involved actors, and the legal and governance frameworks. The analysis identifies gaps and opportunities to strengthen civil-military coordination and improve readiness.

Geographical scope

The assessment covers 141 maritime ports in 22 coastal EU Member States, including TEN-T Core and Comprehensive ports in the Atlantic, North Sea, Baltic, Mediterranean and Black Sea basins. Landlocked countries were also consulted to assess the strength of port connections to the hinterland. The study identifies 219 direct Roll-on/Roll-off connections between ports located in different EU countries.

Outlook

The study finds that EU maritime system provides a strong foundation for defence logistics under dual-use conditions. However, access to ports, vessels and transport services remains uneven and procedures for crisis situations need strengthening.

The greatest opportunities lie in standardised port procedures, targeted investment and guaranteed access to commercial capacity. By addressing these challenges together, the EU maritime transport system can become less fragmented and fully support the operational needs of European defence. Additionally, closer integration with land and air transport would enable maritime transport to function as part of a coherent European military mobility system.



Infrastructure and technical readiness

The analysed maritime network provides substantial but uneven capability:

- Explosive handling capability is available only at 41 ports, mainly in Northern and Eastern Europe.
- 111 out of the 141 ports host terminals for wheeled cargo (Roll-on/Roll-off).
- Many ports are connected to railways but network constraints in the hinterland limit the usable capacity.
- No suitable alternative connections for island countries in the Mediterranean.
- Some ports and terminals operate close to capacity: military use of infrastructure would heavily impact civilian transport.

Key recommendations

- ➢ Focus investment on RoRo, explosives handling and hinterland links at confirmed bottlenecks.
- ➢ Plan for alternative gateways where few options exist.
- ➢ Regularly update port and vessel data and always confirm it with operators and authorities.

Legal and regulatory framework

Maritime military mobility operates within a well-developed civilian framework: international conventions, the International Ship and Port Facility Security Code (ISPS Code), EU maritime and port security legislation, the Union Customs Code and national port rules. The assessment found no significant legislative conflicts. Differences arise in implementation:

- No priority or harmonised fast track for military cargo at ports.
- Reporting, security clearance, customs release and dangerous goods administration:
  - Practices differ from port to port.
  - No EU country operates a single workflow.
- Only a few Member States use customs facilitation for military cargo (EU and NATO Form 302) consistently.

Key recommendations

- ➢ Establish a standard port-interface workflow with priority treatment and crisis-mode activation.
- ➢ Introduce an intermediate readiness regime for faster procedures for crisis situations.
- ➢ Set clear, shared requirements for admitting dangerous goods and military explosives to ports.

Stakeholders and market actors

Effective use of maritime capacity depends on coordination between public authorities and commercial actors at different levels:

- EU level: EDA and European Commission set the framework, while European Maritime Safety Agency (EMSA) supports maritime safety and data.
- National level: Ministries of Defence and Transport, and maritime, customs, and security authorities, implement the framework.
- Port authorities and terminal operators manage access, capacity and permissions.
- Shipowners and transport operators control most vessels and supporting services.
- International level: IMO sets the maritime conventions and frameworks.

Key recommendations

- ➢ Secure reliable access to sealift capacity by maintaining a core of assured capacity, supplemented by commercial agreements clearly defining notice periods, priority access and compensation arrangements.
- ➢ Conclude framework agreements with ports and terminals for availability, compensation and liability.
- ➢ Prepare security, cyber and service-continuity arrangements with operators and authorities.
- ➢ Pool and coordinate multinational demand, and test the procedures through exercises.

