

## **#32 Port politics: Strategic autonomy and European ports**

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### **Key Takeaways**

- Foreign involvement in European seaports and related logistics, especially where China is concerned, has gained greater significance and affects the EU's strategic autonomy.
- A lack of EU cooperation concerning foreign involvement negatively impacts strategic autonomy and limits the EU's control over future scenarios.
- The proposed strategic framework is country-agnostic and aims to minimise risks from countries like China while maximising the economic benefits of foreign involvement.
- Risks to strategic autonomy are assessed as highest in port and maritime infrastructures and in the software domain, especially regarding data disruption.

### **Recommendations**

- The EU's Member States and the European Commission should develop a strategic policy framework to address and manage foreign involvement in seaports and related logistics. Its primary function should be to create a coherent EU-wide approach that reduces risks as much as necessary while maintaining the benefits of foreign involvement as much as possible.
- The framework should be based on a shared understanding that Member States have different economic interests and threat perceptions. It should facilitate convergence of views on the desired balance between limiting risks and maintaining benefits.
- The EU should strengthen key policy instruments, including coordinated FDI screening, competition regulation that limits concentrations of commercial and political power, and a secure EU-wide platform for port data. It should also address gaps in contingency planning, intervention capabilities and transparency requirements for foreign investors.
- The framework should address risks in the software domain through minimum safety requirements, regular maintenance of outdated IT systems, federated information systems and European cloud services for vital trade data. The Netherlands should play a leading role in EU-wide cooperation and build support with countries such as Belgium and Poland.

### **Executive Summary**

European seaports and related logistics are a key part of international trade and logistics, and foreign involvement by third countries has gained greater significance in this sector, especially where China is concerned. This report argues that individual Member States and the EU as a whole

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can actively influence future scenarios by managing the degree of foreign involvement in European seaports and logistics, but that the current lack of EU cooperation negatively impacts European strategic autonomy and limits control over such scenarios. Its central aim is therefore to conceptualise an EU-wide policy framework for strengthening strategic autonomy in the domain of seaports and related logistics sector systems, with China serving as a case study.

The draft strategic framework is designed as a building block for a country-agnostic policy framework, rather than as an instrument targeted only at China. It should serve as a strategic tool encompassing current and future European policies and instruments relevant to foreign influence in maritime infrastructure and related logistics. Its added value lies in improving the current toolbox of instruments, promoting implementation across Member States, and creating an overview of the internal connections and dynamics of a highly diverse and complex sector. The report stresses that such an approach should go beyond risk reduction and also contribute to factors such as economic competitiveness.

To build a common European approach, the framework needs to strike a balance between national interests and the interests of the EU as a whole, as well as between economic integration and economic security. The report finds that Member States differ significantly in their threat perceptions: Poland, Belgium and the Netherlands regard foreign involvement as an urgent potential security threat requiring EU coordination; Germany and France also see a potential security threat but prefer national-level action; while Italy, Spain and Greece do not view foreign involvement in seaports and related logistics as a major security issue, or as the most important issue. These different positions need to be considered if the framework is to mobilise support.

The proposed framework is based on the maritime logistics hub function, divided into four segments: port and maritime operations and infrastructures; hinterland operations and infrastructures; logistics support activities and infrastructures; and the regional impact of logistics operations, including warehouses and re-export operations. Each segment is assessed through three levels: hardware, orgware and software. The report finds that risk levels are highest in port and maritime infrastructures and in the software domain, including serious risks to data disruption and therefore to strategic autonomy.

Current EU tools, including FDI screening, NIS2, the Critical Entities Resilience Directive and the Anti-Coercion Instrument, already provide parts of the toolbox, but they do not yet amount to a focused European approach to seaports and logistics. Gaps remain in areas such as software, technology and digital infrastructure, competition regulation, contingency planning, information-sharing and public transparency requirements for foreign direct investors. The report therefore concludes that the EU and its Member States should further develop and implement the draft strategic framework, with the Netherlands playing a leading role in building support among interested Member States and at EU level.